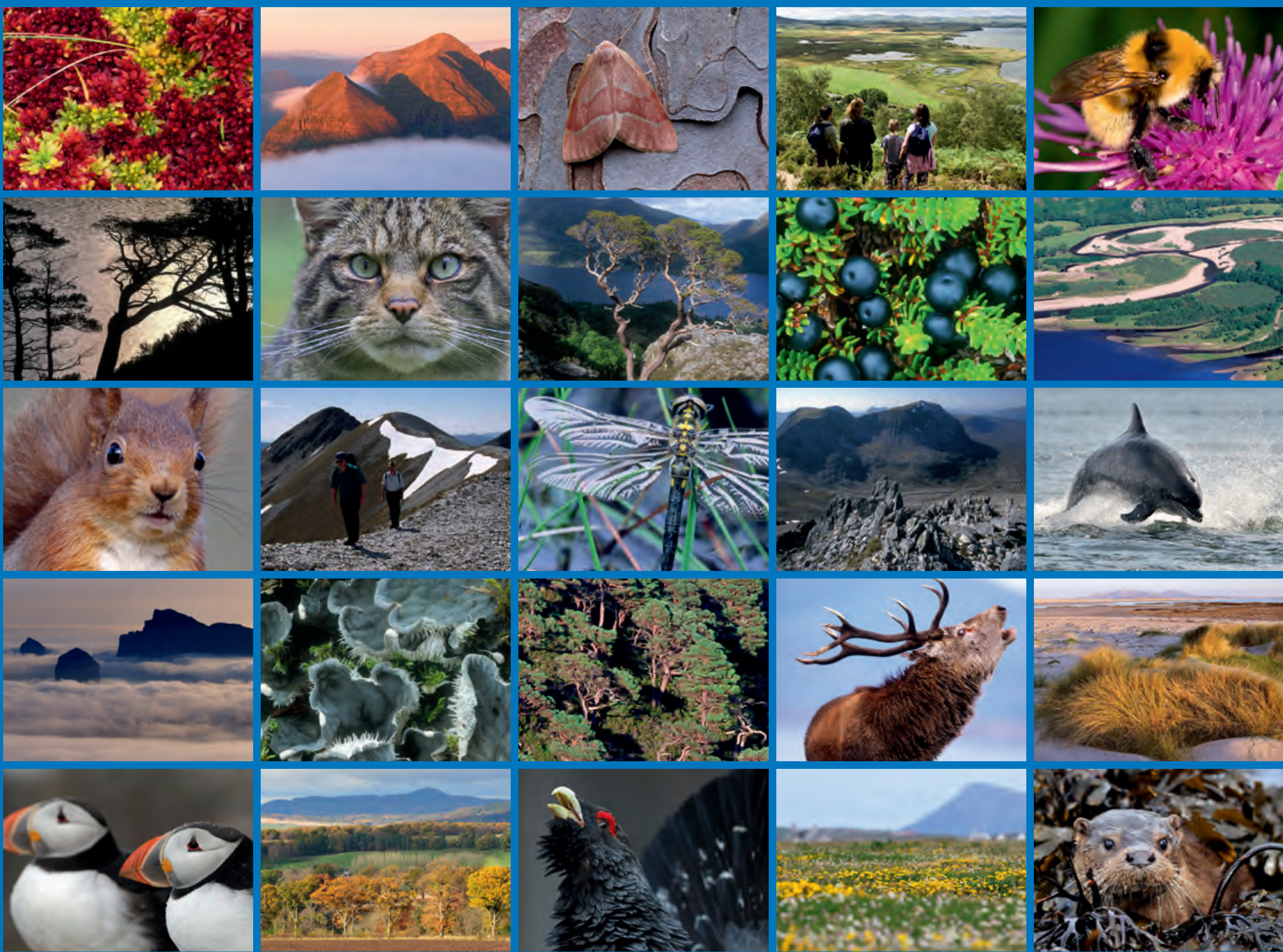
Scottish Natural Heritage
Commissioned Report No. 508

John Muir coast to coast trail: Economic benefit study



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COMMISSIONED REPORT

Commissioned Report No. 508

John Muir coast to coast trail: Economic benefit study

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COMMISSIONED REPORT

Summary

John Muir coast to coast trail: Economic benefit study

Commissioned Report No. 508
Contractor: The Glamis Consultancy Ltd. with Campbell Macrae Associates
Year of publication: 2012

Background

This study sets out an estimate of the potential economic impact of the proposed John Muir Coast to Coast (JMC2C) Long Distance Route (LDR) across Central Scotland.

This report provides an assessment of the overall economic impact that could accrue from the development of the JMC2C route, as well as disaggregating this down to the individual local authority areas which comprise the route. It also recommends ways of maximising the economic impact of the route through targeting its key user markets.

Main findings:

Estimated impact of the JMC2C proposal -

- It is estimated there will be **9,309 potential coast to coast users** in the **first year** of the JMC2C potentially generating **£2.9m** of direct expenditure and creating or safeguarding **127 FTE** jobs in year one.

- Over **five years**, coast to coast users could generate **£16.3m** of direct expenditure and **£27.2m** of total economic impact, creating or safeguarding **708 FTE** jobs.

- Increased **day visitor** use could generate **an increase** in **direct** visitor expenditure of **£8.83m** and **£14.7m** of total economic impact, creating or safeguarding an additional **384 FT**E jobs by year five.
- Combined day visitor and coast to coast usage could generate **£25.1m** additional direct expenditure, **£41.9m** in total economic impact and support **1,091** additional FTE jobs in the first five years

The current baseline -

- **Currently,** based on existing data and information, it is estimated that use of the areas through which JMC2C would pass is around **1.86 million** users annually.

- **Currently,** the total direct spend from existing users is assessed to be around **£36.8m** annually, with greatest direct spend assessed to be in the **Falkirk** and **East Lothian** areas.
- Taking multiplier effects into account, the **existing** economic impact levels derived from existing users is estimated to be **£61m**.
- This helps to create or safeguard around **1,598 FTE** jobs throughout the economy.
- There are currently **2,740 relevant businesses** within the vicinity of the proposed JMC2C route
- There are **57 visitor attractions** welcoming around **9.7 million visitors** per year within the vicinity of the proposed JMC2C route.

Marketing and promotion -

- Maximising the economic impact from coast to coast users is dependent upon creation of an attractive, branded route which becomes well known to LDR users and which can develop good word of mouth awareness amongst key user audiences.
- To maximise the economic impact requires an effective marketing strategy estimated to cost **£140k** over the first five years.

Targeting key user markets -

- It is recommended that the **key target market** is the coast to coast users.
- It is recommended that further stakeholder and consumer **research** is undertaken to market test the John Muir brand.
- In general, few user counts or survey data are available in relation to Scotland's LDRs and there is therefore little hard data available to support evidence based assessment of economic impact.

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Table of contents **Page**

ii. ACKNOWLEDGEMENTS

The consultants gratefully acknowledge the following organisations for their assistance in the preparation of this report.

- British Waterways Scotland
- Dumfries & Galloway Council
- Fife Coast and Countryside Trust
- Hadrian's Wall Heritage Ltd.
- Local authorities in the JMC2C orbit
- Loch Lomond, Stirling and Trossachs National Park Authority
- Pembrokeshire National Park Authority
- Scottish Borders Council
- Scottish Enterprise
- Scottish Natural Heritage
- The Scottish Government
- Visit Scotland

iii. SUMMARY

1. Background

This study sets out an estimate of the potential economic impact of the proposed John Muir Coast to Coast (JMC2C) Long Distance Route (LDR) across Central Scotland.

2. Characteristics of the Proposed Route

SNH is exploring the potential to develop the JMC2C across Central Scotland linking Dunbar to Helensburgh. The JMC2C route will be suitable for and attractive to walkers and cyclists, with horse riding possible on some sections. The route will encourage more users to visit specific sections of the route.

3. Scope of the Study

This report provides an assessment of the overall economic impact that could accrue from the development of the JMC2C route, as well as disaggregating this down to the individual local authority areas which comprise the route. It also recommends ways of maximising the economic impact of the route through targeting its key user markets.

4. Principal Study Conclusion

Based on analysis of readily available data and most realistic assumptions, there are estimated to be **9,309 potential coast to coast users** in the **first year** of the JMC2C LDR. They could generate **£2.9m** of direct expenditure and create or safeguard **127 FTE** jobs in year one.

Over **five years**, coast to coast users could generate **£16.3m** of direct expenditure and **£27.2m** of total economic impact, supporting **708 FTE** jobs over the initial five years of the route.

5. Other Study Findings

1. Based on existing data and information it is estimated that current use of the JMC2C constituent sections could be around **1.86 million** users annually, with around two thirds of these being on a day trip and one third being staying visitors.
2. Total direct spend from existing users is estimated to be around **£36.8m** annually, with greatest direct spend estimated to be generated in the **Falkirk** and **East Lothian** areas.
3. Taking multiplier effects into account, levels and derived from existing users, the total economic impact of the route is estimated to be **£61m** at the current levels.
4. This helps to create or safeguard around **1,598 FTE** jobs throughout the economy.
5. There is **no evidence** of existing **coast to coast** usage i.e. people currently using the sections of the proposed route to travel its entire length
6. Use by non coast to coast visitors (hereafter defined as day visitors) is likely to grow slowly but, as a result of the development of the JMC2C route a new market, **coast to coast users**, will be created.
7. Increased **day visitor** use could generate **an increase** in **direct** visitor expenditure of **£8.83m** and **£14.7m** of total economic impact, creating or safeguarding an additional **384 FT**E jobs by year five.
8. There are estimated to be **9,309 potential coast to coast users** in the first year of the JMC2C route.

9. Based on an average coast to coast trip requiring an average of 6 nights stay coast to coast users could generate estimated direct spend of **£2.9 m** and support **127 FTE** jobs in year 1.
10. Various scenarios have been presented to illustrate how coast to coast use might grow over time.
11. The most realistic scenario envisages coast to coast users alone generating an additional **£16.3m** of direct expenditure and **£27.2m** of total economic impact, supporting **708 FTE** jobs over the initial five years of the JMC2C
12. However in the most ambitious scenario, it is estimated that there could be around **255,000** coast to coast users with direct expenditure **increase** of **£92m**, total economic impact of **£154m** and employment impact of **3,996 FTE** over the five year period.
13. It is the consultants' view that the growth estimates in (11) are realistic by comparison with comparator routes elsewhere
14. This could mean that combined day visitor and coast to coast usage of the LDR could generate **£25.1m** additional direct spend, **£41.9m** in total economic impact and support **1,091** additional FTE jobs in the first five years following establishment of the LDR
15. There are currently **2,740 relevant businesses** within the vicinity of the proposed JMC2C
16. There are **57 visitor attractions** welcoming around **9.7 million visitors** per year within the vicinity of the proposed JMC2C
17. The study considered the impact of forming a branch of the JMC2C using the Kelvin Walkway into Glasgow.
18. Including the Kelvin Walkway in the JMC2C may marginally reduce the overall economic impact of the route, with Glasgow benefiting at the expense of West Dunbartonshire, Argyll & Bute and Stirling
19. Maximising the economic impact from coast to coast users is dependent upon creation of an attractive, branded route which becomes well known to LDR users and which can develop good word of mouth awareness amongst key user audiences.
20. To maximise the economic impact requires an effective marketing strategy estimated to cost **£140k** over the first five years.
21. It is recommended that the key target market is purely coast to coast users as day visitor use is likely to grow organically and offers less return on investment than the coast to coast market.
22. Stakeholder interviews indicated a strong degree of support for the route concept but there are some differing views over the proposed "John Muir Trail" route branding.
23. it is recommended that further stakeholder and consumer research is undertaken to market test the John Muir Trail brand and to identify alternative options
24. There is also a need for market research to indicate whether the coast to coast staying visitor market would regard it as an attractive LDR "offer"
25. There are parts of the JMC2C where the actual route is not complete. It is not yet clear when completion might be done.
26. The proposed route is strongly supported by local authorities at officer level and in some cases, at elected representative level
27. There is a wider issue identified, that little consistent user numbers or survey data is available in relation to Scotland's LDRs and there is therefore little hard data available to support evidence based assessment of economic impact.

28. Therefore our impact assessment is based upon readily available comparator data coupled with analysis of local authority tourism data gathered via STEAM

6. Conclusions and Recommendations

- The JMC2C could generate significant additional local economic impact through attraction of coast to coast users
- There is a requirement for consumer research amongst key target audiences to be undertaken on the route proposals to “market test” the overall concept
- Specifically further consumer research should be undertaken into the route branding and association with John Muir possibly through testing with focus groups of potential users
- Confirmation of the final route options should be developed as quickly as possible
- There are wider issues to be addressed of quality and availability of user information, and assessment of the economic impact of LDRs

As far as possible all estimates in this report are based on existing research, known factors and evidence from comparator routes. However, all estimates should be regarded as indicative, with significant scope for variation depending on the assumptions made in support of the visitor number and economic impact estimates.

1. INTRODUCTION

1.1. Introduction

The Glamis Consultancy Ltd and Campbell Macrae Associates were appointed by Scottish Natural Heritage (SNH) to undertake an assessment of the potential economic benefits arising from the establishment of the proposed John Muir Coast to Coast Trail Long Distance Route (LDR) in Central Scotland (referred to throughout this report as the JMC2C).

1.2. Background

SNH is exploring the development of the John Muir Coast-to-Coast Trail (JMC2C) linking Dunbar in the east to Helensburgh in the west, a distance of approximately 108 miles. The proposed route is based on a number of existing named paths including the John Muir Way in East Lothian, Forth & Clyde and Union Canal towpaths, the Antonine Wall, and the Strathkelvin Railway Path, as well as a range of other stretches of unnamed local paths/routes[1]. It is anticipated that the JMC2C route will be suitable for and attractive to walkers and cyclists, with some sections possibly being suitable for horse riding. Whilst a key aim is to attract users to tackle the whole route, a key principle in designating the line of the route is that it will also attract users to experience short sections.

A key principle in planning the route has been to link existing paths and routes and to connect into many settlements and visitor/heritage attractions in order to seek to provide added interest for users and to maximise the potential for economic impact. For instance, North Berwick, Musselburgh, Edinburgh, Linlithgow, Kirkintilloch, and Balloch all feature on the proposed JMC2C route. The trail encompasses many visitor/heritage attractions such as the Scottish Seabird Centre, Newhailes, The Water of Leith Visitor Centre, The Forth Bridges, Hopetoun House/Estate, Blackness Castle, The Falkirk Wheel, The Antonine Wall, Lomond Shores and The Hill House.

This proposed JMC2C project would be part of the Central Scotland Green Network (CSGN), a key aim of which is to create a network of strategic walking and cycling routes for active travel and recreation, within which, longer distance routes (LDRs) are an important part [2.] The JMC2C route is being proposed:

- as a flagship route in itself and
- as an important spine route supporting the wider network of CSGN LDR routes.

A meeting of all relevant local authorities and other agencies was convened in February 2011 to discuss and explore the concept of a JMC2C route. The outcome of this meeting was sufficiently positive to encourage SNH to undertake a more detailed consultation exercise with the various parties. This took place between May and July 2011 and concluded that there was strong support in principle for developing a route across the Central Belt, which would be popular with and accessible to a wide range of users and would link settlements and places of natural and cultural heritage interest. However, several key issues were identified as follows:

- **The route name -** there was some concern expressed that there is a mismatch between the route name and purpose. (Note that, at this time, there was a strong suggestion that the route could be called 'The John Muir Trail'.)
- **The route alignment** – some route sections needed to be clarified, e.g. Strathblane to Balloch, route options through\round Edinburgh for all users, and the western terminus (whether at Balloch or on the coast, e.g. Helensburgh).
- Identifying **which sections of the route are suitable for all users** and where alternative provision or route "braiding" is required for cycling and horse riding, and to clarify if horse riding provision is intended across the entire route.
- Identifying the required **capital works and costs** for route delivery, and revenue costs for ongoing management and maintenance, as well as potential funding sources.
- Exploring and **articulating the potential economic benefits** that could accrue from the JMC2C route to assist with making the business/funding case.
- **Clarifying the route delivery model and SNH's role**.

This report was commissioned by SNH to explore and articulate the potential economic benefits that could accrue from the JMC2C route. A separate technical feasibility study was undertaken by Donaldson Environmental Consultancy investigating the proposed route in more detail, including its suitability for all users, braiding for cyclists and the capital costs of works required. The studies ran concurrently.

1.3. Aim and Scope of the Study

The aim of this study was to undertake an assessment and estimation of the likely benefit to local economies of the proposed JMC2C. The main needs in this study were to identify and estimate (quantitatively) the potential additional economic benefits which could arise from the extra linkages and profile which the JMC2C project can provide across Central Scotland. The brief specifically required:

- A review of relevant economic studies, management information, academic research and project documents for equivalent proposals and existing routes to assist in identifying user profiles, likely benefits, and average spend by route users, etc.
- An assessment of the number of enterprises likely to be in the JMC2C orbit.
- An assessment of potential additional user numbers/user-types and the net additional benefits to the local economies from use of the route and the scale of these, in terms of visitor spend/income, jobs and gross value added, including multiplier impacts. The likely benefits profile (spatial e.g. local and Scotland, and temporal) should be outlined. It is noted that the approach should follow HM Treasury Green Book principles.
- Recommendations on ways to maximise benefits to local economies, particularly a marketing strategy/plan, but could also include aspects such as the approach to signage, access points/gateways and links to the route, information points, support to local businesses, etc.
- A presentation of the study findings and results to SNH, key local authorities and other partners.

2. METHODOLOGY

The consultants were required to:

- Undertake an assessment of the potential benefits to the local economies in each of the areas located along the proposed JMC2C.
- Provide an assessment of the total potential economic impact of the route along its 108 mile length from Dunbar to Helensburgh
- Make recommendations on maximising the potential economic impact of the route.

These requirements were to be fulfilled by:

- Estimating potential user numbers to the JMC2C
- Estimating potential spend from users in each area
- Using tourism multiplier values to estimate local expenditure and to estimate total expenditure across the JMC2C
- Applying an appropriate ratio to estimate Gross Value Added (GVA)
- Using the multiplier model to estimate employment impact
- Providing an outline promotional plan to maximise the usage of the JMC2C amongst key target markets
- Undertaking analysis of the business types and numbers which exist along the proposed route

2.1. Data Requirements

Deriving reasonable estimates of potential users and economic impact of the proposed JMC2C route required data from a number of sources as follows:

- Estimates of user numbers/user types on the existing sections of the route wherever available e.g. from data counters at various locations on the route and/or from user surveys.
- Market penetration rates (to be estimated through determination of factors such as access, competing attractions, location, etc)
- Expenditure data from any user studies along the proposed JMC2C route and from comparator studies undertaken elsewhere
- GVA Ratios available from the 2010 Destination Baseline Study undertaken by Scottish Enterprise [3]
- Multiplier figures using the Scottish Government Tourism Multipliers for 2007 [4]

2.2. Consultations and Desk Research

SNH provided contact details for the relevant staff (mainly access officers or similar) at the various local authorities along the route. Other relevant organisations such as British Waterways Scotland and Central Scotland Forest Trust were also contacted.

At an early stage an introductory e-mail was sent by SNH staff alerting the various contacts that this assignment was underway. This was followed by an e-mail from the consultants outlining the input we were seeking and requesting a meeting or a suitable time to undertake an in-depth telephone discussion. A range of inputs were sought including:

- Background information on the various sections of the route.
- How sections are currently used and to inform the assessment of what may transpire with the development of the JMC2C route.
- Any available user statistics, user survey data and visitor counts.
- Details of marketing activity and spend on the existing route were also requested
- Details of any previous user surveys or research.
- Consultation on the overall desirability of the route and the use of the name "John Muir Trail"

The outcome of these consultations is discussed in Section 5.

2.3. Comparator Routes

In tandem, various potential comparator long distance routes were identified including

- The West Highland Way
- The Fife Coastal Path
- The Sea to Sea Cycle Route (Northeast England)
- Hadrian's Wall
- The Southern Upland Way
- Pembrokeshire Coast Path
- Thames Path
- Jurassic Coast World Heritage Site

Any relevant information about use, users and economic impact was sourced from these LDRs. It became apparent that although there were some useful sources of information from other routes, this was not as extensive and comprehensive as had been anticipated but was sufficient to allow for visitor numbers and trends on some routes to be investigated and for average expenditure values to be estimated and used in the economic impact model deployed in this report.

Not all LDRs made good comparators. Some were fairly remote with wilderness characteristics, but others such as The Fife Coastal Path, Hadrian's Wall and Thames Path were considered to be similar and highly relevant to the proposed JMC2C route in terms of length and make-up whilst together with the West Highland Way and Southern Upland Way they offered reliable visitor numbers and survey data. Thus most of the comparative data employed in this study is derived from these routes.

2.4. Business Profile

Analysis of the businesses numbers and types in the vicinity of the proposed route was undertaken as follows:

- Postcode analysis was undertaken to identify numbers and types of businesses that might benefit from its development in each postcode district straddling the proposed route

- Through compiling a list of all visitor attractions near the route, along with visitor numbers where available.

For analysis of the business types and profile the following data was sourced

- Number and location of postcode districts along the proposed route
- Analysis of businesses in each postcode district

2.5. Counter Data - The Reality

In reality there were very few counters on the existing routes. Those which were available provided incomplete or variable quality of data or did not count all users e.g. there are cycle counts at sections in Edinburgh and in Strathblane but these do not count walkers.

Similarly in East Lothian, there are counters in car parks on the John Muir Way but they count the number of vehicles rather than individual visitors. In most areas there were no data counters whatsoever which meant that the available data was at best incomplete, inconsistent and at worst, of no real use at all.

As far as can be ascertained, counters which recorded all users exist only on a section of the Millennium Link between Craigmarloch and Linlithgow.

The available data was kindly made available by British Waterways Scotland and by relevant local authorities. Table 2.1 shows the locations where data was available and its usefulness for the study.

Table 2.1
Location And Relevance Of Available Counter Data

Location	**Counter Type**	**Relevance**
John Muir Way, East Lothian	Car Park Vehicle Counters	Useful as a guide in estimating visitor numbers in area
John Muir Way, East Lothian	Cycle counters at three fairly remote locations	Of interest but not regarded as representative of total use
East Lothian Cycle Paths	Cycles only	Useful as a guide
City of Edinburgh	Cycle counters on Innocent Railway, Cramond Bridge and Harrison Park	Useful as a guide
Millennium Link	All users counted at 5 locations on canals between Kilsyth and Linlithgow	Useful for validation of economic impact model used
Strathblane Cycleway	Cycles only	Useful as a guide

The general absence of data meant that an alternative method had to be devised of estimating the baseline visitor numbers from which to then develop analysis of the current and projected use of the JMC2C.

2.6. A Model for Estimating the Baseline User Numbers and Economic Activity

The aim at the outset was to establish a baseline of existing visitor volume and value from which to estimate the potential future use of the JMC2C. The lack of counter data meant that an alternative method had to be devised of providing the baseline which built on consistent and comparable data along the length of the route. We then developed estimates of the existing levels of use of each part of the JMC2C and then projected potential future use of the route based on trends from other LDRs. Data was available from the following sources:

- STEAM data from local authorities to derive estimates of the baseline visitor numbers[5]
- Available count data
- Scottish Census data for 2001 [6]
- The Scottish Recreation Survey [7]
- Scotland's People 2010 [8]
- Data from comparator LDRs and locations to estimate percentage of day visitor use and end to end use and visitor expenditure [9 to 16]

2.6.1. The Scottish Tourism Economic Activity Monitor (STEAM)

All but two Scottish local authorities (Shetland and City of Glasgow) monitor the volume, value and local economic impact of tourism using the Scottish Tourism Economic Activity Monitor (STEAM). STEAM is derived from a model developed in Canada in 1981 and was first run in the UK on behalf of Scarborough Borough Council in 1990. STEAM has been widely employed in Scotland since 1997, first by Area Tourist Boards and more recently by local authorities and is operated by Global Tourism Solutions (UK) Ltd.

STEAM approaches the measurement of tourism at the local level from the supply side, and the confidence level of the model is calculated to be within the ranges of plus or minus 10% in respect of the yearly outputs, making it a relatively reliable, and indeed the only, source of local visitor data for this study.

STEAM provided the **only consistent and replicable measure** of visitor volume and value across the length of the JMC2C. Based on STEAM data, the study team developed two possible models through which to estimate the existing use of the sections of the proposed JMC2C route as follows:

2.6.2. Model 1 – based on STEAM visitor data alone

This model generates direct **visitor numbers**, **visitor days** and **expenditure** estimates from:

- Overnight visitors (including SFR)
- Day visitors based on those making a trip lasting at least 3 hours (i.e. it does not include short and frequent trips, often made by locals to dog walk, etc and who are largely not economically active)

2.6.3. Model 2 – based on STEAM and 2001 Census data

This model also uses STEAM data to estimate direct visitor numbers, visitor days and expenditure estimates from the **staying** visitor market but uses a "top down" approach using disaggregated national level data from Scotland's People and Scottish Recreation Surveys to estimate **total day visit** usage. This model generates impact estimates from:

- Overnight visitors (including SFR)
- All day visitors including, in theory at least, local users, joggers and dog walkers who may visit the route for only minutes, visit a location several times per day and spending nothing

Both models are generally supported by available statistics and data from STEAM and from Census data and Scottish Government reports, mainly the Scottish Recreation Survey and Scotland's People 2010.

2.6.4. The Preferred Model

The main differences between the two models are as follows:

- The two models are based on significantly different **day** visitor figures – those for STEAM include day visitors on a trip of at least three hours whilst use of census data means that **all** local users, including dog walkers and joggers are potentially counted.
- Model 1 is therefore more likely to be measuring users who are economically active during their visit to the various sections of the route rather than incorporating those users who generate little economic impact.
- Model 1 is based on local survey data being gathered through STEAM whilst Model 2 is based on a representative snapshot of the entire Scottish population at national level, which may not be representative of the picture at local level as it is subject to large variances at local level
- Because Model 2 is based on levels of local use being a proportion of the total Scottish leisure day trips, it assumes that the percentage of the total number of local users is the same as the percentage of the total Scottish population which is resident in that locality.
- Model 2 does not take into account those day visitors who may cross boundaries to take a day trip in another part of the route e.g. residents of Edinburgh who may visit East Lothian for a day trip.
- In Model 1 all data is based on the local authority area as the unit of measurement. In Model 2, visitor data is based on the local authority area but the day trip market is based on resident population in each of the route sections – so like is not being compared with like

Model 2 is therefore more likely to artificially inflate usage through including **all** local use and adopts a "top down" approach to estimating day visits by using national level data disaggregated on a per capita basis, introducing potentially large variances between national and local level.
Model 1 is more likely to be representative of the staying and day visitor economic impact arising from economically active route users.

By employing model 1 we believe that a more realistic assessment is possible of the current and subsequently, the future potential levels of route usage from those visitors which are most economically active. Therefore model 1 was used to estimate the impact of current visitor activity and to form a basis for analysis of future JMC2C use.

2.6.5. Validating the Preferred Model

To attempt to validate the preferred model, estimates of the user counts derived from each of the two models were compared with actual count data for the few sections of the route where they were available. This data was provided from the BWS counters in three sections of the Millennium Link where the JMC2C is co-terminus with the Millennium Link and does not braid into separate cycle and walking routes. (Table 2.2)

Table 2.2

Comparison Between Actual BWS Counts And Model Estimates

Data Source	**Counts**
Model 1	800,250
Model 2	2,119,311
BWS Actual	848,510

Using Model 1, the estimated visitor numbers for the sections were not too dissimilar to the actual counts recorded. By comparison, using model 2 meant that the estimated counts were up to 2.5 times higher than the actual values recorded by BWS and by those using Model 1. Determining the situation on the ground in a much more accurate manner would require a significant programme of research to be undertaken which would include:

- An extensive set of counters to be put in place generating ongoing and reliable data
- A regular programme of visitor surveys to ask about visitor expenditure and types of usage

In the absence of these, we believe that the estimates provided are based on the best available data and local tourism knowledge and are therefore more likely to be representative of the actual situation on the ground.
On that basis, Model 1 was regarded as a more appropriate and realistic way to estimate the existing baseline levels of visitor usage of the JMC2C.

3. ECONOMIC PROFILE OF THE EXISTING SECTIONS OF THE PROPOSED JMC2C ROUTE

3.1. Introduction

Economic opportunities for communities and businesses are an important consideration for SNH in planning the route. A key principle in planning the JMC2C is to link together and promote existing paths and routes, and to link existing visitor and heritage attractions to maximise both the interest for users and the economic spin-offs to settlements and businesses along the route. There is already a substantial level of economic impact on the proposed route sections. This is because:

- Many sections are already heavily used by visitors
- Many of the sections are easy to access by car or public transport
- There are many locations where there are existing visitor attractions, some of them major
- Several of the sections in existence already form parts of other recognised way marked trails and routes

Based on the available data on current levels of usage, we have:

- Estimated visitor numbers and visitor expenditure on the whole route and on individual sections as a baseline on which to build projections of future use
- Estimated direct expenditure, total economic impact, GVA and employment impact for the entire route
- Estimated direct expenditure, total economic impact, GVA and employment impact for each local authority area
- Analysed the business profile along the route
- Through stakeholder consultations, identified issues which could impact on the potential to maximise the impact of the route.

3.2. Description of the JMC2C

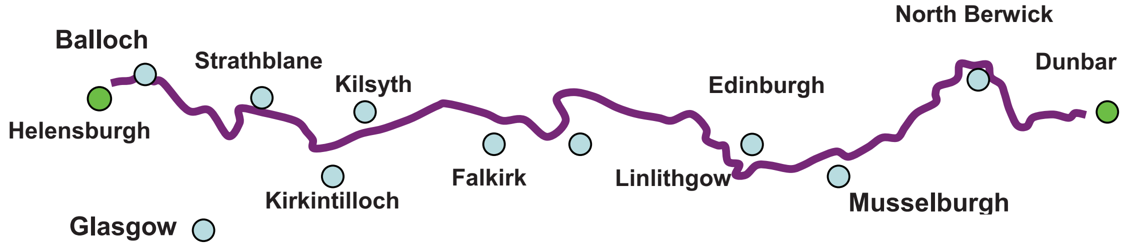
This section sets out an overview of the JMC2C route.

3.2.1. Length

The JMC2C spans 108 miles between Dunbar on the East Coast and Helensburgh on the north bank of the Firth of Clyde (Figure 3.1).

Figure 3.1

Schematic Map Of The JMC2C



Source : Scottish Natural Heritage

3.2.2. Potential Users

The intention of SNH is that the route will offer an opportunity to link together the finest scenery, wildlife and historic sites and other attractions along the way, and to encourage local people and visitors to explore local heritage, either as an end to end experience or by sampling the route through day trips. The route will have as much appeal for cyclists as walkers, and will offer opportunities for more gentle walking as well as more energetic hiking.

3.2.3. Route Characteristics and Topography

The route is characterised by ranging in landscape types from urban to rural, to coastal to upland. It is extremely diverse, passing through the centre of Scotland's capital city in the east, entering its largest city in the west and between them, passing through rural landscapes and amongst the sylvan scenery of the Forth & Clyde and Union canals with archaeological sites, industrial heritage and contemporary visitor attractions in abundance.

East of Edinburgh the coastal scenery is dramatic whilst north and west of Glasgow the route takes on more of a "wilderness" ambience with dramatic loch, estuary and mountain scenery at its western end. Unlike many other LDRs, the JMC2C is a route along which there is already a high level of preexisting visitor activity.

3.3. Establishing the Baseline of Existing Economic Activity – What is the Economic Impact of Existing Visitors?

To estimate future growth potential, there is a requirement to establish a baseline of existing economic activity from which to project the future impact of the development of the JMC2C. The data sources used in estimating the economic baseline using Model 1 are shown in Table 3.1.

Table 3.1

Data Types And Sources

Data Type	Source
Staying and day visitor numbers in each local authority area	Local authority STEAM data
Estimates of visitor spend per capita based on available comparator or pre-existing local survey data	Survey data from comparator LDRs
Data on visitor profile, seasonality of use and user types (e.g. walkers, cyclists)	Survey data from comparator LDRs
Estimates of the degree to which the route generates additional spend	Survey data from comparator LDRs
2007 Tourism Multiplier values	Scottish Government
Tourism Employment multiplier values	Scottish Government
GVA Ratio	Scottish Enterprise Destinations Baseline Audit 2010

3.3.1. Estimating the Baseline Visitor Numbers

Based on the model described above it is estimated that there could be a baseline of around 1.86 million visitors to the JMC2C route sections in total.

Of these, around 595,815 are estimated to be urban or rural staying visitors whilst an estimated 1.26 million are on a day trip of three hours or more in urban or rural parts of the route (Table 3.2).

Table 3.2

Estimates Of Baseline Visitor Numbers

Estimated Rural Day Visitors	632,377
Estimated Urban Day Visitors	633,686
Total Day Visitors	**1,266,063**
Estimated Rural Staying visitors	331,206
Estimated Urban Staying visitors	264,609
Total Staying Visitors (i.e. tourists)	**595,815**
Estimated Total visitors	**1,861,878**

It should be noted that this model makes no attempt to quantify **local use** from regular dog walkers and joggers etc who may generate high user numbers but little economic impact.

3.3.2. Estimating Market Penetration Rates

Central to estimating current visitor numbers is the need to estimate the degree of penetration of the route into the existing local visitor market in each area. This requires consideration of the following factors:

- **Location** – how close to the main area of visitor activity does the proposed JMC2C route lie? (e.g. in Falkirk, it is co-terminus with the Falkirk Wheel and both canals, the main areas of visitor activity in Falkirk, so market penetration will be extremely high
- **Access** – how accessible is the JMC2C to vehicles and public transport, e.g. in East Lothian, the car parks at Gullane and Yellowcraigs are co-terminus with the JMC2C and access by rail to North Berwick and Dunbar is good so market penetration is likely to be high.
- **Competing attractions** – what competing attractions lie nearby which may offer a more attractive visitor experience than the JMC2C. E.g. in Edinburgh, the JMC2C runs relatively close to attractions in the Royal Mile, the main tourism area in the city. Notwithstanding that, it is considered unlikely that the JMC2C attracts many visitors away from the Royal Mile therefore market penetration is likely to be low.

It should be noted that whilst the values in Table 3.2 appear to be precise, they are derived from analysis of STEAM data together with application of estimated market penetration rates. Therefore they are subject to potentially large ranges and should be interpreted as representative rather than absolute

3.3.3. Estimating the Baseline – Average Visitor Expenditure

The average expenditure per visitor was derived from a range of average expenditure values obtained through review of visitor surveys on a number of existing LDRs and destinations which are located on LDRs (e.g. Carlisle where VIC data indicates a high percentage of enquiries regarding Hadrian's Wall [17]). The average expenditure values were based on the following survey data (Table 3.3).

Table 3.3 Average Expenditure Values From Other LDR's And Locations	
Route/Location	**Spend per visitor per day**
Cairngorms National Park	£26.48
Carlisle staying visitors	£45.04
Dunkeld and Birnam day visitors	£12.40
Dunkeld and Birnam UK visitors	£30.30
Edinburgh staying visitors	£77.50
Fife Coastal Path	£26.00
Hadrian's Wall (End to end)	£43.84
Hadrian's Wall (local users)	£12.58
Lomond Hills	£7.00
Scottish NNR Overall average (excluding users who spent nothing)	£25.81
Scottish NNR Overall average (including users who spent nothing)	£20.86
Scottish NNRs day trip	£13.31
Scottish NNRs holiday visitors	£34.52
Scottish NNRs short day trip	£9.51
Southern Upland Way (sectional walkers)	£37.66
Southern Upland Way (whole way walkers)	£40.74
Southern Upland Way day visitors	£7.23
Thames Path (London)	£1.48
Thames Path (Outside London)	£0.99
Wainwright Coast2Coast	£41.52
West Highland Way day visitors	£4.73

Based on the data above, the average expenditure per person per day values for urban and rural staying and day visitors are shown in Table 3.4.

Table 3.4 Average Expenditure Values	
Average urban day visitor	£1.24
Average urban staying visitor	£61.27
Average rural day visitor	£9.54
Average rural staying visitor	£35.13

Based on the estimated user numbers and expenditure values obtained above, further estimates were then undertaken of:

- Direct user expenditure in each section of the JMC2C
- Direct user expenditure for the JMC2C route overall
- Total economic Impact through application of Type II multiplier values
- Estimates of employment created or safeguarded
- Estimate of the impact of displacement on the gross figures
- Gross Value Added (GVA) for each section and for the route overall
- Through applying seasonality data, a profile of users over the course of a typical year

3.3.4. Estimating the Baseline - Direct Visitor Expenditure

Direct visitor expenditure was estimated through multiplying the estimated number of day visitors and staying visitors by an average day expenditure value for each of the categories of visitors. The formula used to estimate the total direct visitor expenditure is as follows:

Spend per visitor x Estimated visitors = Total visitor spend

Applying this formula to the visitor numbers estimated in Table 3.2 means that it is possible to estimate direct visitor expenditure **currently taking place** on the length of the proposed route. Table 3.5 shows the “top line” estimates for:

- Total Visitor numbers
- Direct Visitor Expenditure

Table 3.5

Estimated Baseline Direct Visitor Expenditure On The JMC2C

Total Estimated Visitors	1,861,878
Total Estimated Direct spend	£36,812,476

The estimated existing direct expenditure on the proposed route is **£36.8 million**. This is the estimate of **direct visitor expenditure** – i.e. what is spent by visitors directly whilst they are in the vicinity of the route. These are the baseline expenditure values from the estimated visitor numbers in areas where the JMC2C will be developed before account factors such as displacement, substitution, leakage and multiplier effects are taken into account.

3.3.5. Multipliers, Gross Value Added and Employment Impacts.

The following section addresses the multiplier impact, displacement effect and Gross Value added (GVA) arising from within the baseline of visitor activity.

a) Application of Tourism Multipliers

The concept of the multiplier is based upon the recognition that the various sectors which make up the economy are interdependent. In addition to purchasing primary inputs such as labour, imports etc, each sector will purchase intermediate goods and services produced by other establishments within the local economy. There are three types of multipliers which relate to expenditure by tourists. These are:

- Direct Effect
- Indirect Effect
- Induced Effect

The **Direct Effect** is that felt by those establishments and their employees where tourist spend their money and include accommodation establishments, restaurants, shops, attractions etc.

The **Indirect Effect** results from the need of an industry which has experienced an increase in demand to make purchases from other industries within an economy in order to produce its output. Thus a change in tourist expenditure on hotel accommodation will have a direct effect on hotel employment plus an indirect effect on the employment of suppliers to the hotel sector.

The **Induced Effect** reflects the fact that as income levels rise throughout the economy as a result of the initial change in final demand, a portion of the increased income will be re-spent on final goods and services produced within the local economy.

There are two types of tourism multipliers, type I and type II. Type II multipliers measure the total of the direct, indirect and induced effects. We have applied the most recently available Type II Scottish Tourism multiplier values (from 2007)[4] to estimate overall baseline economic impact:

- For the overall length of the proposed JMC2C
- At the level of each section of the proposed JMC2C

The formula used to estimate the Type II multiplier impacts is as follows:

Direct Visitor Spend x Type II Multiplier = Gross D+I+I spend

On this basis, the estimated direct, indirect and induced economic impact is as follows:

D+I+I Expenditure = £36,812,476 x 1.67 = **£61,476,835**

b) Employment Impact

We have applied the most recently available Scottish Tourism employment multiplier values for 2007 to the estimated spend in each section and for the JMC2C overall to estimate Full Time Equivalent (FTE) employment impact:

- Locally as a result of the development taking place
- In the wider Scottish economy.

The formula used to estimate the employment created or safeguarded by baseline expenditure on the JMC2C overall is as follows:

Gross D+I+I Spend / *Employment Multiplier* = *FTE equivalent jobs impact*

On this basis, the employment multiplier impact of baseline visitor expenditure is as follows:

£61,476,835 / £38,461 = **1,598 FTE**

c) Gross Value Added (GVA)

GVA is essentially the profit, wages and salaries that are generated by businesses in producing and selling products and services to visitors and route users. We have estimated the GVA arising only from **direct** visitor expenditure as the GVA value for tourism expenditure is readily available. The formula used to estimate the GVA is as follows:

Direct Visitor Spend x GVA Ratio = Gross Value Added*

*The GVA Ratio employed is the average ratio of 42% derived in the Scottish Enterprise Destination Baseline Survey undertaken in 2010 by the consultants SQW[3].

On this basis, the GVA impact of baseline visitor expenditure is as follows:

£36,812,476 x 42% = **£15,460,418**

3.3.6. Summary of Estimated Existing Economic Impact

Based on the foregoing estimated visitor numbers, application of expenditure averages and multiplier values, it is estimated that **existing** visitor activity at locations along the proposed route currently has the following economic impacts (Table 3.6).

Table 3.6

Summary Of Estimated Existing Economic Impact

Total Estimated Staying Visitors	595,815
Total Estimated Day Visitors	1,266,063
Total Estimated Visitors	1,861,878
Total Direct spend	£36,812,476
Total D+I+I impact	£61,476,835
GVA	£15,460,418
Total FTE created or safeguarded	1,598

These figures form the basis of estimates of the economic impact of future day visitor and **additional** economic impact from coast to coast usage and economic impact.

3.4. Estimating Current Impact in Each Local Authority Area

STEAM is run on a local authority basis so there is a mismatch between local authority areas and the sections of the JMC2C. The relationships between the route sections and local authority areas are shown in Table 3.7.

Table 3.7

Relationship Between JMC2C Route Stages And Local Authority Areas

Stage	Route stage	Length (miles)	Local Authority area
1	Dunbar - North Berwick, via East Linton	15	East Lothian
2	North Berwick – Musselburgh, via Aberlady and Cockenzie	19	East Lothian
3	Musselburgh – Cramond, via Meadows and Corstorphine	14	City of Edinburgh
4	Cramond – Linlithgow, via South Queensferry and Bo'ness	15	City of Edinburgh West Lothian Falkirk
5	Linlithgow – Kilsyth, via Falkirk and Banknock	17	Falkirk North Lanarkshire
6	Kilsyth – Strathblane, via Kirkintilloch and Milton of Campsie	10	North Lanarkshire East Dunbartonshire Stirling
7	Strathblane – Balloch, via Kilpatrick Hills	10	Stirling West Dunbartonshire LLTNP
8	Spur link to Glasgow via Kelvin Walkway	c10	City of Glasgow
9	Balloch - Helensburgh	8	Argyll & Bute LLTNP

Based on the preferred model, it is possible to provide an estimate of the current economic impact, including the multiplier and employment impacts in each section of the proposed route on the basis of the local authority area in which the JMC2C lies.

3.4.1. Direct Visitor Expenditure in Each Local Authority Area

Based on the formula applied at the level of the entire route and taking market penetration at the local level into account, it is also possible to estimate visitor numbers and direct expenditure in each local authority area (Table 3.8)

Table 3.8

Estimated Visitor Numbers And Direct Expenditure In Local Authority Areas

Local Authority	Estimated Visitors	Estimated Direct Expenditure
East Lothian	440,885	£7,904,067
City of Edinburgh	193,731	£1,426,973
West Lothian	207,236	£3,960,724
Falkirk	346,934	£14,375,056
North Lanarkshire	357,038	£3,301,216
East Dunbartonshire	75,317	£1,306,809
Stirling	23,232	£351,914
West Dunbartonshire	214,411	£4,078,419
Argyll & Bute	2,502	£66,217
City of Glasgow*	592	£41,082
TOTAL	**1,861,878**	**£36,812,476**

**likely to be underestimated*

Taken in its entirety, the total direct visitor expenditure currently taking place in the areas where the JMC2C will be developed is estimated to be approximately £36.8 million (Table 3.6).

3.4.2. Multiplier and Employment Impact in Each Local Authority Area

Based on application of type II and employment multiplier values, it is possible to estimate the impact of direct expenditure in each local authority area (Table 3.9)

Table 3.9

Impact On Local Authority Area

Local Authority	Visitors	D+I+I	FTE
East Lothian	440,885	£13,199,792	343
City of Edinburgh	193,731	£2,383,044	62
West Lothian	207,236	£6,614,409	172
Falkirk	346,934	£24,006,343	624
North Lanarkshire	357,038	£5,513,031	143
East Dunbartonshire	75,317	£2,182,371	57
Stirling	23,232	£587,696	15
West Dunbartonshire	214,411	£6,810,960	177
Argyll & Bute	2,502	£110,582	3
City of Glasgow*	592	£68,607	2
TOTAL	**1,861,878**	**£61,476,835**	**1,598**

**likely to be underestimated*

A full breakdown is provided in Appendix 1.

3.4.3. Comments on Economic Impact Estimates

It should be noted that these estimates relate to visitor expenditure which may be **already** occurring based on **current** estimates of volume and value derived from STEAM reports. The estimates include the impact of staying visitors and day visitors with a stay of three hours. Many of the sections of the proposed JMC2C route already attract significant visitor numbers, with the exception of some of the more rural sections and it appears that there is significant economic activity already taking place along the length of the proposed route. Below, we set out:

- A summary of **current economic impact** in each local authority area
- Comments on why the levels of visitor numbers and direct expenditure **in each area** are as estimated

a) East Lothian

• Estimated Total Visitors	• 440,885
• Total Direct Spend	• £7,904,067
• D+I+I (Total Economic Impact)	• £13,199,792
• FTE	• 343

East Lothian benefits from the existing way marked and promoted John Muir Way which is one of East Lothian's main tourism assets. There are extremely high vehicle counts at coastal car parks including:

• Longniddry Bents	600,000 (over the three car parks)
• Gullane	300,000
• Yellowcraig	280,000
• John Muir Country Park	440,000 (over the three car parks)

Major attractions such as the Scottish Seabird Centre and Dirleton Castle lie on the route and it is clear that there is high usage from tourists and from day visitors throughout the year, many of whom are likely to be on a day trip from Edinburgh, or tourists staying in the East Lothian area.

b) City of Edinburgh

• Estimated Total Visitors	• 193,731
• Total Direct Spend	• £1,426,973
• D+I+I (Total Economic Impact)	• £2,383,044
• FTE	• 62

There is significant existing economic impact in Edinburgh. Available evidence from cycle counts on sections such as the Innocent Railway and the A90 cycle route at Cramond Bridge indicates that there is also regular use of these sections as commuter routes for cyclists.

c) West Lothian

• Estimated Total Visitors	• 207,236
• Total Direct Spend	• £3,960,724
• D+I+I (Total Economic Impact)	• £6,614,409
• FTE	• 172

There are relatively high levels of use of the existing route sections as a result of existing signage and recognised routes together with good access from coastal car parks, town centres and relatively good public transport, including rail access at Linlithgow. Existing routes are a key aspect of the West Lothian tourism offering.

d) Falkirk

• Estimated Total Visitors	• 346,934
• Total Direct Spend	• £14,375,056
• D+I+I (Total Economic Impact)	• £24,006,343
• FTE	• 624

Estimates of current local economic impact are extremely high. The Falkirk Wheel attracts very high visitor numbers and customer awareness - 98% of respondents in the 2004 Falkirk Visitor Survey knew of it[18]. Another potentially significant attraction, the Antonine Wall, is adjacent to the route and benefits to some degree from the Falkirk Wheel with 8% of Wheel visitors also visiting the Antonine Wall[19] (now a World Heritage Site).

e) North Lanarkshire

• Estimated Total Visitors	• 357,038
• Total Direct Spend	• £3,301,216
• D+I+I (Total Economic Impact)	• £5,513,031
• FTE	• 143

With its large urban population North Lanarkshire there is significant economic impact as a result of high existing visitor numbers. The Forth and Clyde Canal offers an attractive and accessible recreation and visitor location for the large numbers of day visitors which are already present in North Lanarkshire. Developments such as Auchinstarry Marina have added to the attractiveness of the canal and demonstrated that as new visitor facilities and services are developed then visitor numbers are likely to increase. As with Falkirk, some parts of the Antonine Wall are also an existing major draw which complements the proposed route.

f) East Dunbartonshire

• Estimated Total Visitors	• 75,317
• Total Direct Spend	• £1,306,809
• D+I+I (Total Economic Impact)	• £2,182,371

- FTE — 57

There is currently a relatively high level of economic activity on the proposed route as a result of adjacency to the Forth and Clyde Canal for much of its length. At locations such as Kirkintilloch Marina and Glasgow Bridge there are already high levels of visitor usage due to commercial developments, waterside facilities, restaurants and boat trips. Proximity to main routes and good access means that estimated usage levels are high.

Mugdock Country Park lies in the Stirling Council area but is managed by East Dunbartonshire Council. There are high levels of local and day visitor activity. The park is also a potential nodal point on the proposed JMC2C where routes from west, east and Glasgow converge with the existing West Highland Way. This strategic location may offer a nodal point for the development of a range of visitor facilities to meet the requirements of the users of all these routes as well as offering potential for increased local usage.

g) West Dunbartonshire

- Estimated Total Visitors — 214,411
- Total Direct Spend — £4,078,419
- D+I+I (Total Economic Impact) — £6,810,960
- FTE — 177

There are high levels of visitor activity around Balloch. The area includes Balloch Castle Country Park, the River Leven and Drumkinnon Bay with a number of major attractions such as the Loch Lomond Aquarium, Loch Lomond Shores and Loch Lomond itself and a range of cycle routes and walking routes. All of these locations lie on the proposed route or will join with it.

Elsewhere in West Dunbartonshire the proposed route offers the greatest level of “wilderness” experience as it crosses the Kilpatrick Hills from Strathblane with distant views of Loch Lomond, Ben Lomond and the Southern Highlands. There is currently no economic impact in these areas and it is unlikely that this part of the proposed route will be available until 2014.

h) Stirling

- Estimated Total Visitors — 23,232
- Total Direct Spend — £351,914
- D+I+I (Total Economic Impact) — £587,696
- FTE — 15

The impact of current visitor activity in the Stirling area is negligible as there is no marked route between Strathblane and Balloch. Only the Strathblane Cycleway and West Highland Way offers a recreation or tourism resource in the area and are probably responsible for any current economic impact. There are few accommodation outlets or visitor attractions and only one visitor attraction, at Glengoyne Distillery. However if the route was established, the local economic impact could be significant, with increased numbers of coast to coast users passing through the area.

i) Argyll & Bute

• Estimated Total Visitors	• 2,502
• Total Direct Spend	• £66,217
• D+I+I (Total Economic Impact)	• £110,582
• FTE	• 3

The current economic impact in this area is likely to be **extremely low**. The route goes over Stoneymollan Hill from Balloch to Helensburgh and although known by local users its attraction to day visitors is very limited on account of relative inaccessibility and competitor attractions at Balloch. There are no businesses on the currently proposed route. In the wider context of Argyll, the route is not as attractive to users as other routes such as the Cowal Way, Kintyre Way and the Three Lochs Trail which potentially, it could share between Balloch and Helensburgh. If the route was established, the local economic impact **could** be significant, with increased numbers of **coast to coast** users passing between Balloch and Helensburgh, generating demand for local services mainly in the two towns where businesses are located.

j) City of Glasgow

• Estimated Total Visitors	• 592
• Total Direct Spend	• £41,082
• D+I+I (Total Economic Impact)	• £68,607
• FTE	• 2

Estimates of the current impact in Glasgow are likely to be **underestimated.** As Glasgow does not use STEAM, there is no data readily available to support estimates of day visitors from which to make assumptions on the potential level of day visitor use of the Kelvin Walkway. A sylvan setting in an urban environment, the Kelvin Walkway could offer an attractive aspect of the JMC2C as an alternative to the sections north and west of Mugdock Country Park. Given the location, availability of competing city attractions, availability of other recreational spaces such as the many city parks and coupled with lack of vehicular access to the Kelvin Walkway, it is likely that there are **few day visitors or tourists** currently using the route. There may be scope to increase use if the route was more visibly branded as part of the JMC2C or West Highland Way and more effectively linked with the rest of the route at Mugdock Country Park

On the basis of the analysis undertaken in section 3, we proceed to estimate the **additional economic impact** of the JMC2C in future years in section 4.

4. ESTIMATING FUTURE ECONOMIC IMPACT OF THE JMC2C

4.1. Introduction

If the JMC2C becomes established as an LDR, levels of visitor numbers and economic impact on the route may increase through greater awareness, driven by a range of marketing and promotional activities and developments. In this section we consider

- The impact of growth in usage by day visitors
- The impact of growth in coast to coast users
- The potential to increase coast to coast usage
- Sensitivity analyses setting out the potential economic impact of increasing coast to coast usage

Note that the term "day visitors" relates to **any non-coast to coast** usage and includes **tourists** to the area and **day visitors** on a visit of three hours or more, from within the local authority area or beyond.

4.2. Estimating Growth in Usage by Day Visitors

In general it is likely that use by day visitors will continue to grow in future. The reasons for this are as follows:

- Access legislation has opened up potential for greater access via core paths and designated routes
- Demand for access to the countryside is likely to increase as more facilities are provided
- There is scope to develop facilities for walkers, cyclists, horse riders at particular locations making these areas more accessible for public use
- Usage is regularly enhanced through local events and activities such as walking festivals, green space campaigns and canal festivals
- Where new, attractive outdoor recreation spaces are provided use increases as a result of word of mouth communication and increasing awareness of the space

From consultation with access officers it is likely that future day visitor use of the JMC2C may not necessarily be dependent upon route branding but is driven more by local knowledge, word of mouth and enhancing the profile of recreation facilities in general. However it appears that where LDRs such as Hadrian's Wall have been established then the level of day visitor use has generally increased over a period of time as a result of the route being clearly branded and promoted and enhancing access. In this section we estimate:

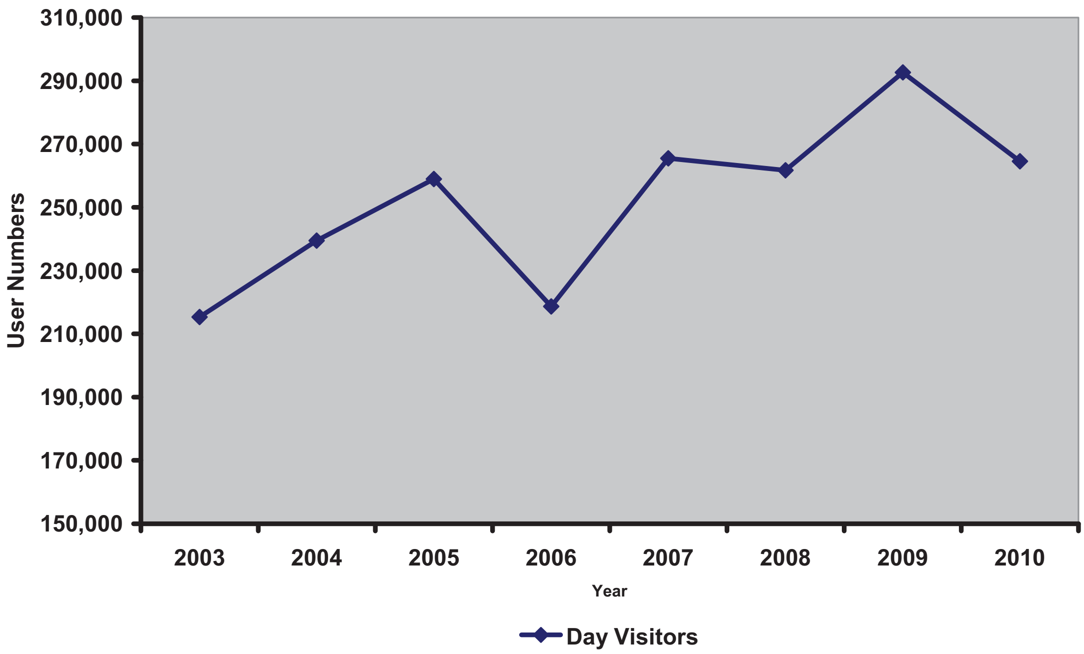
- The potential for growth in day visitor usage
- Impact of growth in day visitor usage

Based on

- the estimates provided above and
- the available data on growth of day visitor usage from other comparator coast to coast routes

We have considered available data from the Hadrian's Wall LDR to estimate the rate at which use of the JMC2C by day visitors could grow. Growth in day visitors on Hadrian's Wall has not been constant year on year, indeed there have been years when it has declined, but it has still increased at an **overall** growth rate of 3.7% between 2004 and 2010. Because patterns of use have been erratic during that time period, the actual visitor numbers between 2003 and 2010 have increased only by an annual average of 0.6% per year (Figure 4.1).

Figure 4.1 : Day Visitors on Hadrian's Wall



Source : Hadrian's Wall Heritage Ltd

On this basis, it is estimated that day visitor use of the JMC2C could grow, organically, at a "smoothed" average of around 0.3% per year in response to the factors described in section 4.2. This is lower than Hadrian's Wall because currently, the growth rate of 0.6% is driven by:

- New developments at key visitor sites on Hadrian's Wall
- Strong marketing of the wall as a local leisure and education facility as well as a destination
- A much lower presence of local competitor attractions on the wall than in the vicinity of the JMC2C

However, given that the launching of the branded JMC2C will generate a higher profile than is currently the case, it might be expected that the market exposure associated with its opening may drive a higher growth rate in the day visitor market – towards around

0.5% per annum. Therefore, we have assumed a growth rate of 0.5% per annum in future **day visitor** activity.

4.3. Impact of Growth in Day Visitor Usage

Estimating the impact of day visitor usage assumes the following variables:

- annual growth rate in local use of 0.5%
- increase in visitor expenditure per capita at 5% per annum to take real growth and inflation into account
- Average spend data based on a range of surveys for rural and urban staying or day visitors
- Use of the baseline data as the basis of growth estimates

Note that in the subsequent projections, the baseline data, i.e. the estimated current visitor level, is used as the basis of the Year 1 user numbers.

The estimated impact of these assumptions is set out in Table 4.1.

Table 4.1
Estimated Impact Of Future Day Visitor Usage

	Year 1	Year 2	Year 3	Year 4	Year 5
Estimated Rural Day Visitors (0.5% pa growth)	632,377	635,539	638,717	641,910	645,120
Estimated Urban Day Visitors (0.5% pa growth)	633,686	636,854	640,039	643,239	646,455
Estimated rural staying (0.5% pa growth)	331,206	332,862	334,526	336,199	337,880
Estimated urban staying visitors (0.5% pa growth)	264,609	265,932	267,261	268,598	269,941
Estimated total visitors (0.5% pa growth)	1,861,878	1,871,188	1,880,543	1,889,946	1,899,396
Average spend per urban day visitor (5% pa growth)	£1.24	£1.30	£1.37	£1.44	£1.51
Average Spend per urban staying visitor (5% pa growth)	£69.38	£72.85	£76.49	£80.32	£84.33
Average Spend per rural day visitor (5% pa growth?)	£9.54	£10.02	£10.52	£11.04	£11.60
Average spend per rural staying visitor (5% pa growth)	£35.13	£36.89	£38.73	£40.67	£42.70
Total spend - urban day visitors	£785,771	£829,184	£874,997	£923,340	£974,355
Total spend - urban staying visitors	£18,358,556	£19,372,867	£20,443,218	£21,572,705	£22,764,597
Total spend - rural day visitors	£6,032,879	£6,366,196	£6,717,928	£7,089,094	£7,480,766
Total spend - rural staying visitors	£11,635,270	£12,278,118	£12,956,484	£13,672,330	£14,427,726

Table 4.1 (Continued)

Estimated Impact Of Future Day Visitor Usage

Total Direct Spend	£36,812,476	£38,846,366	£40,992,627	£43,257,470	£45,647,445
GVA Ratio	42%	42%	42%	42%	42%
GVA	£15,461,240	£16,315,474	£17,216,903	£18,168,137	£19,171,927
Type II multiplier	1.67	1.67	1.67	1.67	1.67
D+I+I	£61,476,835	£64,873,430	£68,457,687	£72,239,975	£76,231,233
FTE	1,598	1,687	1,780	1,878	1,982

A summary of the potential additional impact over five years from growth in day visitor activity is shown in Table 4.2.

Table 4.2

Additional Day Visitor Activity Over Five Years

	Year 1	**Year 2**	**Year 3**	**Year 4**	**Year 5**
Direct Expenditure Increase from Baseline	0	£2,033,889	£4,180,151	£6,444,994	£8,834,969
D+I+I increase from baseline	0	£3,396,595	£6,980,852	£10,763,139	£14,754,398
GVA increase from Baseline	0	£854,234	£1,755,663	£2,706,897	£3,710,687
FTE increase from Baseline	0	88	182	280	384

In summary increased **day visitor use** by year five could generate:

- Increase in overall usage from **1.86m** to **1.89m** visitors
- Increase in direct expenditure of **£8.83m**
- Increase in total economic impact of **£14.7m**
- Increase in GVA of **£3.7m**
- Increase in FTE of **384**

4.4. Estimating the Economic Impact of Coast to Coast Usage

Based on available data and consultations, there is no evidence of any **coast to coast** usage of the JMC2C route in its **current** state. This is unsurprising given that:

- The route is incomplete
- It is not promoted as a branded and identifiable coast to coast LDR “offer”
- It currently has no market appeal to long distance users
- There is no survey data to identify any coast to coast users

However, based on:

- Existing volume and value from the baseline data in section 3
- Comparison from surveys undertaken on other LDR's

Estimates have been made of the volume and value of coast to coast users which might be expected in year 1 if the route was available in its entirety and promoted to target user markets.

4.4.1. Estimating the Percentage and Numbers of Coast to Coast Users

Numbers of potential coast to coast users on comparator LDRs is shown in Table 4.3

Table 4.3

Percentage End To End Use On Various Routes

Route	**% end to end**
Hadrian's Wall	3.7
C2C Cycle Route[23]	5.0
Millennium Link (estimate for boats)	0.5
Southern Upland Way	1.9
Fife Coastal Path (estimate)	1.0
Average	**2.4**

The average percentage of end to end usage across these 5 routes is 2.4%. However routes such as the C2C, Southern Upland Way and Hadrian's Wall are well established and have higher profile in the market place than the JMC2C. The inclusion of the C2C Cycle Route increases the overall average, which in its absence, falls to 1.8%. Out of all of these routes, we believe that the Fife Coastal Path offers a more reasonable comparator for the JMC2C at least in year 1.

The reality is that the JMC2C is not currently active in the market place and when it is, it would compete with a range of potentially more attractive LDRs to generate its own share of the long distance business. We believe therefore that the JMC2C is likely to experience a relatively low level of coast to coast usage in its early years, until it becomes widely known as an attractive, interesting and safe route established in the "must do" category for aficionados of LDRs.

4.4.2. How Many Coast to Coast Users?

Assuming that the percentage of coast to coast users will be a proportion of the baseline number of total estimated users, we have developed an estimate of the volume and value of coast to coast users on the JMC2C in year 1 based on:

- available visitor number and expenditure data set out in section 3

- using a user market penetration rate of 0.5% of the baseline in year 1, comparable to less well known routes as through traffic will be negligible at the outset
- the reality that the route will not be widely known in its first year
- the likelihood that a route through the central belt is likely to be less attractive to users than other, more attractive and higher profile LDRs

On the basis of a 0.5% market penetration rate, it is estimated that a coast to coast user number of 9,309 is realistic in year 1. There are 10,600 end to end users on Hadrian's Wall and around 34,000 end to end users on the West Highland Way. Estimates suggest there may be around 4,800 to 5,800 end to end users on the Fife Coastal Path. These compare realistically with an estimated 9,309 potential coast to coast users on the JMC2C based on comparator levels of market penetration of the existing baseline user market.

4.4.3. Deadweight and Displacement

To estimate the net economic impact or 'additionality' consideration must be given to 'leakage', 'deadweight' and 'displacement' effects. These terms are described in HM Treasury Green Book[20] and are summarised below.

- **Leakage** effects benefit those outside of the spatial area or group that the intervention is intended to benefit.
- **Deadweight** refers to outcomes that would have occurred without intervention.
- **Displacement** measures the extent to which the benefits of a project are offset by reductions of output or employment elsewhere.

All of these effects could reduce the net benefit from development of the JMC2C.

a) Leakage

Leakage occurs when spending by users of the JMC2C takes place outside the immediate area of the route, for example, by staying overnight in a neighbouring area. However, as the route runs through the central belt and through major urban centres users are unlikely to travel far from the route to their accommodation. A route with some similar characteristics in terms of proximity to rural settlements and urban areas is the Thames Path where most path users who were not local residents were staying locally. We would therefore suggest that there is unlikely to be any significant leakage from the JMC2C to more distant areas.

b) Deadweight

In the context of this study, deadweight refers to the level of economic activity which exists without development of the JMC2C – what we have so far termed the "baseline" of economic activity. It is likely that there is a significant level of deadweight on the route, which will not be adversely or beneficially affected by the establishment of the JMC2C.

However anecdotal evidence from access officers suggests that when access is enhanced, routes are effectively branded, signposted and promoted as part of a wider network then the deadweight or baseline use increases, with the potential to generate additional user spend. This view is supported by available evidence from Hadrian's Wall where both day visitor use and end to end usage have increased since establishment of the LDR. We therefore assume that all of the existing baseline activity represents "deadweight" whilst future economic impact generated through establishment of the JMC2C will be additional to the existing baseline activity.

c) Displacement

Displacement occurs when economic activity on the JMC2C is generated at the expense of activity elsewhere in Scotland.

d) Displacement Amongst Coast to Coast Users

There is evidence to support the view that the long distance coast to coast user market is:

- Highly enthusiastic about LDRs
- Knowledgeable about LDRs throughout the UK
- Comprised dedicated "route baggers"
- Highly susceptible to sampling new LDRs on an end to end basis
- Very likely to return in future to repeat their visit

This is supported by evidence from a number of LDR visitor surveys as follows:

e) The West Highland Way Visitor Survey

Responses to the West Highland Way online survey indicates that 80% of users on the West Highland Way would do the whole way again, indicating the strength of commitment amongst end to end users for the route. However 40% of West Highland Way users indicated that they had also walked another LDR in Scotland, with the Great Glen Way being the most cited and even lesser known trails such as the Cateran Trail, Kintyre Way and Cowal Way being popular with respondents. These findings reflect the 2006 West Highland Way survey which found that half of all respondents had used other long distance routes in the UK in the last 5 years whilst 75% of respondents intended to walk other long distance routes in the next 5 years. Of those respondents 15% indicated that they intended to walk a "coast to coast" route. Again, this is representative of a robust "route bagger" market which would be target for the JMC2C. It is likely that there is a market for the JMC2C which constitutes "route baggers" – i.e. staying visitors who seek out long distance routes, a high percentage of whom may be resident outside Scotland.

f) Fife Coastal Path User Survey

Respondents in the FCP survey who were aware of other walks or paths in the UK were asked if they had used any of these paths. Nearly two in three of these respondents had done so (63% or 42% of all users) with the West Highland Way being the LDR most often used.

g) The experience in England and Wales - National Trail Users Survey

Research carried out by Natural England and the Countryside Commission for Wales on the 15 National Trails in England and Wales in 2007[21] indicated 33% of those taking part in the survey were classified as dedicated "National Trail users". The biggest survey samples were taken on the Hadrian's Wall Path (278) and The Pennine Way (252), although over 2,150 questionnaires were completed overall. 51% of users surveyed were staying away from home. 93% of the users surveyed were walkers and 5% were cyclists.

4.4.4. How much Displacement might occur on the JMC2C?

It appears that users of LDRs are well informed, dedicated users who regularly undertake end to end walks. The challenge in estimating displacement is to determine what degree of coast to coast users are likely to be resident in Scotland and what impact this would have on visitor expenditure. The only available comparative data relates to the West Highland Way, where 46% of all users are Scottish residents (Table 4.4).

Table 4.4

Origin Of Visitors On The West Highland Way

	Country of Residence		
	Scotland	England	Other
Numbers	118	34	106
% total	46%	13%	41%

Source : West Highland Way Online Visitor Survey

For dedicated LDR users, if the overall LDR "offer" was to be expanded to include the JMC2C they are likely to use the JMC2C **in addition** to revisiting the West Highland Way and other LDRs in future.

The JMC2C offers an entirely different experience from the West Highland Way, where 35% of walkers did the route primarily because it was challenging. Clearly the JMC2C is less so and not as scenic but there was also a percentage of West Highland Way users (6%) indicating that a factor in walking the West Highland Way was because it was an LDR, because it offered a wildlife experience (5%), was safe (3%) and had a good standard of path (3%). It is feasible that many users of the West Highland Way may also look for another route which is not necessarily as challenging but still offers an attractive, but possibly different, long distance route experience which they will undertake in addition to existing LDRs. There appears to be a core market of "route baggers" who will walk a route simply because it is there.

4.4.5. Conclusions on Displacement amongst Coast to Coast Users

Based on the foregoing, we regard it as likely that users of the JMC2C undertaking a coast to coast journey, irrespective of place of residence, are likely to be **additional** to current levels of activity on other LDRs and that they will add the route to their list and "bag it" within five years of route opening rather than using it at the expense of other LDRs. Therefore, we are of the view that amongst this group of dedicated LDR users, **all coast to coast** usage can be regarded as **additional**.

4.4.6. Displacement amongst Day Visitors

It is also assumed that as has happened on Hadrian's Wall, the establishment of the JMC2C raises the profile of all sections of the route and is responsible for generating an average incremental increase in day visitor usage of around 0.5% per annum.

4.4.7. Additionality

Scottish Enterprise defines additionality as [22]:

"the extent to which something happens as a result of an intervention that would not have occurred in the absence of the intervention"

In the case of the JMC2C, additionality occurs mainly as a result of the generation of new day visitor and coast to coast visitors and expenditure over and above that which would have taken place in the absence of the JMC2C being established. It is likely that there is a small level of additionality arising from the baseline of day visitors along the route as a result of establishment of the JMC2C.

However the main additionality accrues from those **new** users who will undertake a coast to coast transit and particularly those who are from beyond Scotland. Coast to coast users from within Scotland could be regarded as potential displacement at the Scottish level but we believe that evidence suggests that the "route bagger" market is sufficiently robust for the JMC2C to be used **in addition** to existing routes.

However the market is very competitive with a range of scenic LDRs ranging from the Pennine Way (most frequently used) to the Thames Path. The challenge is to position the JMC2C in the market to ensure that it becomes a "must do" route within the UK long distance route "bagger" market. If this can be achieved and the route offers a high quality and welcoming experience, then it may rapidly increase in profile amongst the "route baggers".

4.4.8. Conclusions on Deadweight, Displacement and Additionality

For the purposes of the estimates we therefore assume that:

- Existing day visitor usage is 100% deadweight
- Future day visitor usage is additional assuming that it can be attributed to the JMC2C establishment
- All coast to coast usage is additional and can be attributed to the establishment of the JMC2C.

4.5. Estimating the Economic Impact of Coast to Coast Users in Year 1

The estimated volume and value of potential impact of coast to coast users in year 1 is as shown in Table 4.5.

Table 4.5 *Year 1 Impact Of Potential C2C Users In Year 1*	
Coast to Coast Users Alone	**Estimated Total**
Potential Coast to Coast Visitors	9,309
Average Spend per Visitor per day (based on average of urban and rural staying visitors)	£52.25
Average number of days to do route	6
Total Direct Spend	£2,918,494
GVA	£1,225,767
D+I+I	£4,873,885
FTE	127

It is estimated that an average of 6 nights is required to undertake a coast to coast transit and that all coast to coast economic impact generated is additional. Note that in estimating average expenditure values and types of users, no recent or specific data exists to differentiate spend values for cyclists from that of walkers. However it is likely that on urban sections around 15% to 20% of users could be cyclists, based on the Thames Path in London and on available (anecdotal) evidence for the Innocent Railway in Edinburgh. In England, on average, the percentage split on all National Trails is:

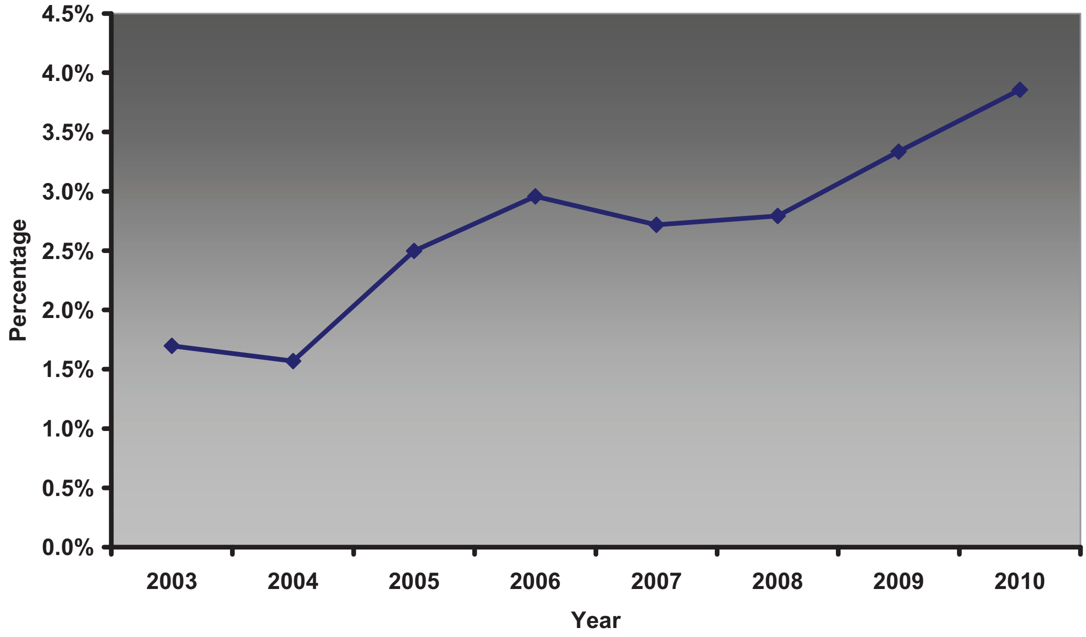
- Walkers 93%
- Cyclists 5%
- Horse riders <2%

The percentage split varies dependent upon the nature and location of the National Trail. Therefore average visitor expenditure values are based on average values for all users, from available data.

4.5.1. Impact of Future Growth in Coast to Coast Usage

The growth of coast to coast, or end to end usage would be **additional** to that of the day visitor impact estimated above. There is evidence to suggest that when routes become well defined and promoted then the levels of end to end usage as a percentage of the total increases. As an example, the percentage of users on Hadrian's Wall who are undertaking an end to end journey has increased from a starting point of 1.8% to 3.7% in 2010 (Figure 4.2)

Figure 4.2 : Percentage End to End Users on Hadrian's Wall



4.6 Sensitivity Analysis

To reflect the potential for a range of growth rates, we have set out three scenarios for projecting future coast to coast growth. These are:

- Scenario 1: Market penetration of the total user numbers **remains at 0.5%** throughout year 1 to year 5
- Scenario 2: Market penetration rate **increases** from 0.5% in year 1 to 3% in year 5
- Scenario 3: Market penetration rate of 0.5% in year 1 **increases** to 5% in year 5, comparable to the C2C Cycle Route in England

Based on these three scenarios, the estimated user numbers, direct expenditure and economic impact from **coast to coast users** are as shown in Table 4.6.

Table 4.6 Sensitivity Analysis Scenarios					
Scenario	**Year 1**	**Year 2**	**Year 3**	**Year 4**	**Year 5**
Scenario 1 user numbers	9,309	9,356	9,403	9,450	9,497
Scenario 2 user numbers	9,309	18,712	37,611	47,249	56,982
Scenario 3 user numbers	9,309	28,068	47,014	75,598	94,970
Scenario 1 Direct Expenditure	£2,918,494	£3,079,741	£3,249,896	£3,429,453	£3,618,931
Scenario 2 Direct Expenditure	£2,918,494	£6,159,482	£12,999,586	£17,147,266	£21,713,583
Scenario 3 Direct Expenditure	£2,918,494	£9,239,222	£16,249,482	£27,435,626	£36,189,305
Scenario 1 GVA	£1,225,767	£1,293,491	£1,364,957	£1,440,370	£1,519,951
Scenario 2 GVA	£1,225,767	£2,586,982	£5,459,826	£7,201,852	£9,119,705
Scenario 3GVA	£1,225,767	£3,880,473	£6,824,783	£11,522,963	£15,199,508
Scenario 1 D+I+I	£4,873,885	£5,143,167	£5,427,327	£5,727,187	£6,043,614
Scenario 2 D+I+I	£4,873,885	£10,286,334	£21,709,308	£28,635,934	£36,261,684
Scenario 3 D+I+I	£4,873,885	£15,429,501	£27,136,635	£45,817,495	£60,436,139

4.7. Estimated Employment Impact

The estimated impact of each of the three scenarios on additional employment is shown in Table 4.7.

Table 4.7 Employment Supported (FTE) In Each Scenario					
Scenario	**Year 1**	**Year 2**	**Year 3**	**Year 4**	**Year 5**
Scenario 1 FTE	127	134	141	149	157
Scenario 2 FTE	127	267	564	745	943
Scenario 3 FTE	127	401	706	1,191	1,571

4.8. Summary of Sensitivity Analysis

The three scenarios and their impact on direct expenditure, GVA an employment over five years are summarised in Table 4.8.

Table 4.8

Summary Of Coast To Coast Scenarios Over 5 Years

	Scenario 1	**Scenario 2**	**Scenario 3**
Estimated coast to coast users	47,015	169,863	254,958
Total Direct Spend	£16,296,515	£60,938,410	£92,032,129
GVA	£6,844,536	£25,594,132	£38,653,494
D+I+I	£27,215,180	£101,767,145	£153,693,656
FTE	708	2,646	3,996

These growth figures are based on relatively small baseline numbers at the outset. However evidence from Hadrian's Wall indicates that where a recognisable and popular coast to coast or end to end route has been developed, the coast to coast traffic develops at an average annual growth rate which is reflective of the overall profile of the route and the strength of branding.

On Hadrian's Wall, the number of end to end users has almost trebled since the route was formally opened in 2003, even though the end to end numbers are only 10,600. However growth reflects not only the high profile and popularity of the route but also the strength of the marketing and promotion which lies behind it. Whether such growth rates could be seen on the JMC2C which has no current market presence is debatable.

4.9. Which is The Most Likely Scenario?

We believe that the most likely scenario lies close to scenario 1 but with potential to increase towards scenario 2 if:

- The route is strongly marketed
- It generates good word of mouth amongst the "early adopters" who then pass on positive recommendations to other LDR aficionados

Growth in end to end use is facilitated by:

- A clear geographic focus e.g. the West Highland Way and Great Glen Way
- Branding of the route with a recognisable logo – e.g. Wainwright's Coast to Coast, Hadrian's Wall, Pembrokeshire Coast Path, Fife Coastal Path and Jurassic Coast
- Increasing awareness amongst potential users through effective marketing
- Providing high standards of facilities and service to encourage repeat visitors
- Generating positive word of mouth referrals – over 70% of users of the West Highland Way heard about the route via word of mouth recommendation
- All available LDR user surveys indicate that "end to enders" have high awareness of other routes apart from the one they are on – there is a need to get on their "wish list"

4.10. Additional Economic Impact – Day Visitor and Coast to Coast Users Combined

The potential **additional** impact from the baseline over the five year period is estimated by combining the impact from **day visitors** with that of **coast to coast** users from the sensitivity scenarios (Table 4.9)

Table 4.9

Summary Of 5-Year Additional Economic Impact

	User Numbers	Direct Expenditure	GVA	D+I+I	FTE
Day visitors	37,518	£8,834,969	£3,710,687	£14,754,398	384
C2C Scenario 1	47,015	£16,296,515	£6,844,536	£27,215,180	708
C2C Scenario 2	169,863	£60,938,410	£25,594,132	£101,767,145	2,646
C2C Scenario 3	254,958	£92,032,129	£38,653,494	£153,693,656	3,996
Worst case	84,533	£25,131,484	£10,555,223	£41,969,578	1,091
Mid case	207,380	£69,773,379	£29,304,819	£116,521,543	3,030
Best case	292,476	£100,867,098	£42,364,181	£168,448,054	4,380

The range of the potential economic impact over the first five years of the route can be summarised as follows:

- Visitor Numbers increase by between **84,533** and **292,476**
- Direct Expenditure increases by between **£25.1m** and **£100.8m**
- GVA increases by between **£10.5m** and **£42.3m**
- D+I+I increases by between **£41.9m** and **£168.4m**
- FTE increases by between **1,091 FTE** and **4,380**

4.11. Comparison of Impact of the Five Year Scenarios

Clearly the ranges in each category are substantial. However this is caused by the range of growth rates in each of the sensitivity scenarios. In all likelihood, we believe that coast to coast scenario 1 will be the more likely to occur in which case the impact on expenditure and employment will still be substantial but at the lowest level of potential growth.

Day visitor usage could increase by 37,500 users creating or safeguarding 230 jobs, however even at the lowest level of coast to coast usage, (with only 47,000 coast to coast users over five years) this will generate a **significantly greater** economic and employment impact, than from increased day visitor use.

Thus it is clear that even modest levels of coast to coast usage could have a greater economic impact than increased day visitor use, even if the most pessimistic scenario for coast to coast use occurs. This indicates that any marketing resources devoted to the JMC2C should be focussed on **coast to coast users**, leaving growth in day visitor use to occur more organically, as has been suggested occurs already in existing recreational areas when access becomes available.

4.12. Seasonality

In the absence of specific data for comparator Scottish coast to coast routes, it is assumed that the seasonal distribution of visitors to the JMC2C will broadly mirror that of tourism in Scotland as a whole, based on seasonality profiles available from VisitScotland and published in the UK Tourist 2010[24].

It is also possible to undertake a comparison of how seasonal patterns of use might compare with the actual situation on Hadrian's Wall (Figure 4.3).

Figure 4.3 : Seasonality Comparisons

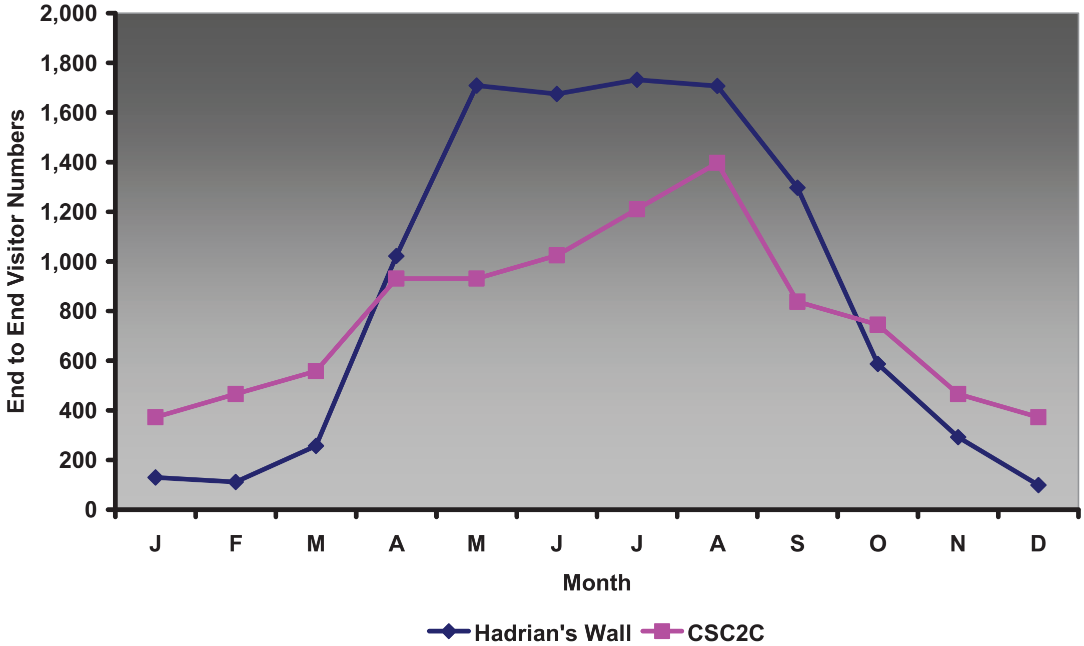


Figure 4.3 illustrates that the actual pattern of end to end usage on Hadrian's Wall does not mirror the seasonal national tourism profile experience in Scotland. Consistently high levels of usage are maintained from March to September and the seasonal August peak is not apparent amongst end to end trail users. This may reflect the age and demographic profile on Hadrian's Wall where 62% of users are over 45 years of age and only 4% are accompanied by children. They may be prepared to undertake the route at times when there are fewer visitors about and they are more prepared for a range of weather conditions. End to end walking on Hadrian's Wall is generally not a family holiday experience and neither is it considered likely that a coast to coast transit of the JMC2C will offer a family holiday experience.

4.13. Employment Impact

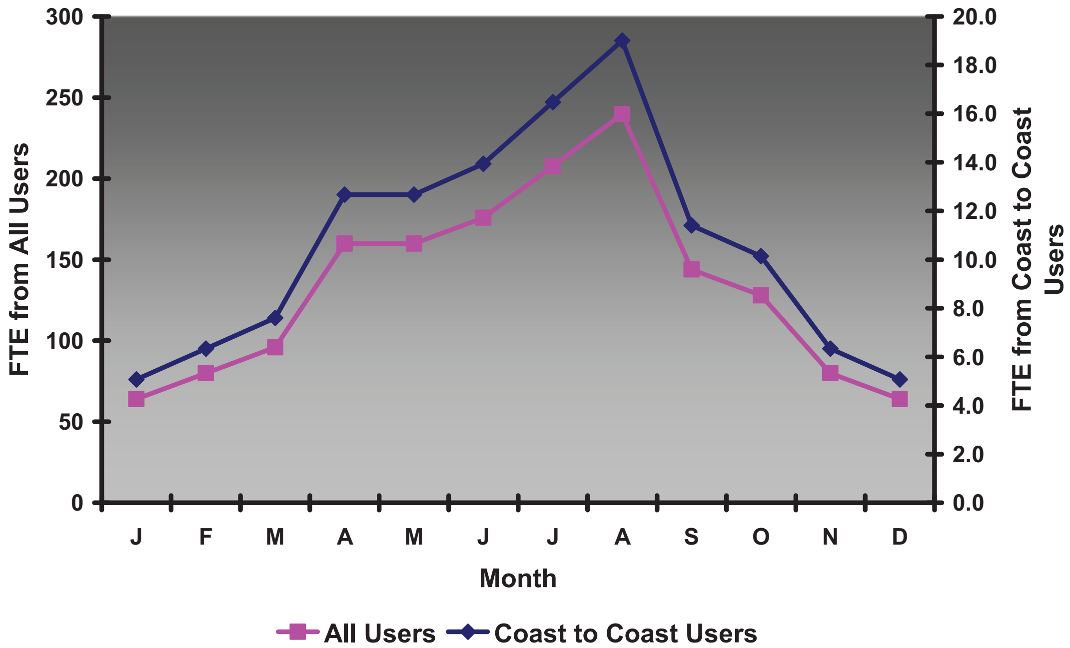
If it follows the Scottish national trend, the employment supported on the JMC2C by expenditure from total users and coast to coast visitors will also be highly seasonal in nature. Based on year 1 FTE of 957 (supported by day visitor expenditure) and 76 (supported by coast to coast visitor expenditure), the seasonal employment profile is illustrated in Table 4.10 and Figure 4.4.

Table 4.10

Year 1 Seasonal Employment Impact Of Visitor Spend

	FTE supported				
User Type	**Q1**	**Q2**	**Q3**	**Q4**	**TOTAL**
All user spend	240	496	591	272	1,598
C2C user spend	19	39	47	22	127
TOTAL	**259**	**535**	**638**	**293**	**1,725**

Figure 4.4 : Estimated Seasonal Employment Impact



The total direct, indirect and induced expenditure generated is estimated to support around 1,725 FTE in the local and national economy in year 1 with the peak level of support occurring in August when 240 FTE are supported with 591 supported in the third quarter overall.

This could rise in future years in all of the scenarios, but the employment supported is likely to remain highly seasonal in nature, with a highly pronounced third quarter seasonal peak. The employment created by impact of coast to coast visitors **alone** is estimated to be 127 FTE in year 1, which is also likely to be seasonal in nature, with a peak of 19 FTE jobs created or safeguarded in August, and 47 in the third quarter, as a result of expenditure from coast to coast users.

4.14. Local Impact of Coast to Coast Users

In estimating the potential local impact of coast to coast users, there are some variations from the "whole route" analysis which must be taken into account. These are:

- It is assumed in estimates of local economic impact that **all** of the projected 9,309 users in year 1 stay **one night** in each of the nine local authority areas
- However this is **unlikely to happen** as the average time for a transit is likely to be 6 nights
- Several local authority areas can be crossed in one day's walking or cycling
- Therefore the local impact estimates in the following tables are **overestimated**.
- This gives local impact estimates which **do not add up to the total impact** for the route as a whole as set out earlier in section 4.
- The estimates are therefore **highly illustrative** in nature

Taking the above caveats into consideration and **based on 9,309** visitors staying overnight in every local authority area, the economic impacts are shown in Table 4.11.

Table 4.11

Illustrative Impact Of C2C Users In Each Local Authority Area

Local Authority	C2C Visitors	Direct Expenditure	D+I+I	FTE
East Lothian	9,309	£327,025	£546,132	14
City of Edinburgh	9,309	£645,858	£1,078,584	28
West Lothian	9,309	£327,025	£546,132	14
Falkirk	9,309	£645,858	£1,078,584	28
North Lanarkshire	9,309	£485,660	£1,078,584	28
East Dunbartonshire	9,309	£327,025	£546,132	14
Stirling	9,309	£327,025	£546,132	14
West Dunbartonshire	9,309	£327,025	£546,132	14
Argyll & Bute	9,309	£327,025	£546,132	14
TOTAL	**n/a**	**£3,739,526**	**£6,512,544**	**168**

Notwithstanding the health warnings over the statistical analysis, it is apparent that the additional coast to coast users generated via the JMC2C could have significant local economic impact, particularly in those more rural areas where there is currently little or no existing visitor activity.

4.15 Impact of Route Branching – the Kelvin Walkway to Glasgow

4.15.1. Current Assumptions

This section considers the impact of inclusion of the Kelvin Walkway. This is a 10 mile spur which currently exists and could form a southern extension of the JMC2C route and of the West Highland Way linking Mugdock Country Park via the River Kelvin into Glasgow to the River Clyde walkway.

4.15.2. The JMC2C without the Kelvin Walkway

If the Kelvin Walkway is included in the JMC2C then there is a potential **decrease** in economic impact in the three local authority areas west of Glasgow. This occurs as a result of the through traffic splitting at Mugdock. Using the Kelvin Walkway means a shorter journey from end to end. The economic impact of these scenarios is shown in Table 4.12.

Table 4.12

Economic Impact Of Branching At Mugdock

Local Authority	**Total Expenditure (D+I+I)**	
	No use of Kelvin Way	**50% use of Kelvin Way**
East Lothian	£546,132	£546,132
City of Edinburgh	£1,078,584	£1,078,584
West Lothian	£546,132	£546,132
Falkirk	£1,078,584	£1,078,584
North Lanarkshire	£1,078,584	£1,078,584
East Dunbartonshire	£546,132	£546,132
Stirling	£546,132	£273,095
West Dunbartonshire	£546,132	£273,095
Argyll & Bute	£546,132	£273,095
City of Glasgow	£0	£539,350
TOTAL	**£6,512,543**	**£6,232,783**

There is also an impact on employment in which use of the Kelvin Way results in a decrease of 21 jobs overall, in the three rural areas to the north and west. However the converse is that 14 FTE jobs are generated in Glasgow due to expenditure taking place in the city, a net decrease of 7 FTE (Table 4.13).

Table 4.13

Impact On Employment Of Branching At Mugdock

Employment Impact	**FTE**	
Local Authority	**50% Use of Kelvin Way**	**No use of Kelvin Way**
Stirling	7	14
West Dunbartonshire	7	14
Argyll & Bute	7	14
City of Glasgow	14	0
TOTAL	**35**	**42**

Branching on the Kelvin Walkway has no impact on areas which are east of Mugdock Country Park as all users, irrespective of their direction of travel, will use those sections, even in those areas where braiding takes place over short sections.

4.16. Return on Investment Analysis

Does the JMC2C represent good value for money? In the absence of a readily available specific cost/benefit analysis method we have estimated the value for money of the JMC2C by comparing

- Overall estimated capital costs (as identified by Donaldson Environmental Consultancy)
- With GVA for the route
- Cost per job

The total capital costs of the project are estimated at £901,488. Based on this, the return on investment (RoI) over **five years** for each of the three scenarios set out in the project are shown in Table 4.14.

Table 4.14

Return On Investment Estimates

	Scenario 1	**Scenario 2**	**Scenario 3**
Total costs (ex VAT)	£901,488	£901,488	£901,488
Coast to coast visitors (5 years)	47,015	169,863	254,958
Cost per visitor	£19.17	£5.31	£3.54
Direct Expenditure (5 years)	£16,296,515	£60,938,410	£92,032,129
Return on Investment	18	68	102
D+I+I (5 years)	£27,215,180	£101,767,145	£153,693,656
Return on Investment	30	113	170
GVA	£6,844,536	£25,594,132	£38,653,494
Return on Investment	8	28	43
Jobs created or safeguarded (5 years)	708	2,646	3,996
Cost per job	£1,274	£341	£226

In summary, based on the economic impact of coast to coast users alone, the return on investment for the capital expenditure is as follows:

- Cost per visitor ranges from **£19.17** to **£3.54** per visitor
- RoI for direct expenditure ranges from **18** to **102**
- And for total economic impact ranges from **30** to **170**
- RoI for GVA ranges from **8** to **43**
- Cost per job reduces from **£1,274** to **£226**

These values do not take into account the expenditure accrued on marketing and promotion of the JMC2C.

4.17. Conclusions on JMC2C Economic Impact

The findings of the economic impact assessment can be summarised as follows:

- There is a high level of existing economic activity along the length of the proposed JMC2C route
- This baseline may be worth around **£61.5m** to the local and Scottish economies
- There is no evidence that any coast to coast use is currently undertaken using the proposed route
- In the most likely scenario there is potential to increase **day visitor** usage to generate up to £14.7m over five years in additional direct visitor expenditure
- In the most likely scenario there is potential to generate additional coast to coast users of around **47,000** over five years.
- In the most likely scenario there is potential to generate up to **£16.3m** over five years of direct expenditure from coast to coast users, if the route offers a competitive and attractive LDR experience
- In the most likely scenario additional coast to coast use offers scope to generate or safeguard employment of an estimated **708 FTE** jobs in the local and Scottish economies over five years

From the foregoing analysis, we conclude that:

- There is a high level of existing economic activity as a result of the proposed route of the JMC2C being overlaid on existing visitor locations and routes where there are already high levels of visitor activity
- There may be scope to generate significant levels of **coast to coast** users
- Levels of both day visitor and coast to coast use would be likely to grow following route establishment, possibly at a rate which could generate significant levels of additional economic impact
- However the most significant economic and employment impact comes from increased **coast to coast** usage
- There is scope to generate significant economic impact from coast to coast users particularly in those areas where **visitor activity is currently low**.
- However our analysis is based purely on readily available data and does not take into account the consumer view or competitive position of the route within the overall Scottish and UK LDR “offer”
- Nor does it consider how the potential user market may respond to an LDR offer which does not offer the wilderness experience of the most successful LDRs.
- However to make it competitive for long distance users may require significant levels of marketing support in order to raise awareness amongst the higher value staying visitor market
- We therefore recommend that some detailed market research is undertaken into how potential end to end users would view the “offer” and how they would respond to it.

5. CONSULTATIONS WITH STAKEHOLDERS

5.1. Introduction

At the outset the study team anticipated that the access officers and route managers could provide robust information on current user numbers and types of users of the route and that user surveys were undertaken. This proved not to be the case and it proved challenging to source user data across the entire length of the proposed route.

5.2. Consultation Findings

A summary of the consultations is provided below with details set out in Appendix 2.

- The proposed JMC2C project was welcomed and all consultees were enthusiastic about its potential
- As highlighted from previous meetings there are some concerns about the John Muir name/connection.
- Counter data was available for some sections of the proposed route. However, there was generally insufficient counter data on the current use of the sections of the proposed JMC2C route.
- Some counters were designed to only count cyclists. Even where there are counters, data was not always consistent or collected on an ongoing basis. Due to malfunctioning counters, some of the count data was incomplete
- As far as can be ascertained, no user surveys had been undertaken on any section of the proposed route. Hence all of the information provided in terms of the profile of users and most of the information provided on trends was anecdotal and based on the experience, views and observations of the consultees.
- No user expenditure data or estimate of economic impacts was available for any of the route sections, necessitating the use of expenditure data from other LDRs.
- The Central Scotland Forest Trust provided a series of perception studies it had undertaken in 2005, 2007 and 2011. These covered the whole of the Central Scotland Forest area and found high levels of local repeat visitors, with many arriving by foot and staying for a relatively short time but no questions on spend were included.
- Falkirk Council undertook a short survey of visitors to the Falkirk Wheel in summer 2011 to ascertain what else visitors to the Wheel did. Whilst 8% of those surveyed visited the Antonine Wall on the same trip and 23% said they might visit it in the future, again there was no question on spend. Almost two thirds of those surveyed were from outwith FK postcodes indicating that the Wheel is a major regional, as opposed to local attraction.
- Useful vehicle counts from coastal car parks in East Lothian were available. The various country parks close to the proposed route were also approached to ascertain if they had any relevant visitor profile or spend data and helpful information was provided by Mugdock Country Park.
- The anecdotal evidence suggests that currently, walkers predominate on the route sections and the vast majority of users are local, with some day trippers but no overnight stays.
- Use throughout the year is fairly stable but often with some peaking in the better weather but as awareness increases more use of the paths/route sections is apparent.

- There was some evidence that the route sections had been instrumental in stimulating business establishment or expansion. In Falkirk it was suggested that horse livery yards had been established/expanded partly on the basis of the path network in south Falkirk. A number of farm shop type operations had also sprung up in the south Falkirk area. In East Lothian, a noticeable impact on local businesses in East Linton was cited as a result of linking two existing paths to form part of the John Muir Way.
- A comprehensive report from BWS[24] indicated that there have been significant economic benefits of the reopening of the Millennium Link on increased visitors and on commercial property and businesses.
- the establishment of the JMC2C along part of it could further enhance the impact of the Millennium Link in West Lothian, Falkirk, North Lanarkshire and East Dunbartonshire
- The current path/route infrastructure has been provided largely as a local resource but consultees recognised the potential to tap into a wider market and attract overnight stays.
- Current marketing activity was patchy although some sections had leaflets and web based resources. Some but not all routes were signed and some were already partly branded e.g. John Muir Way (in East Lothian), Millennium Link, Three Lochs Trail and Strathblane Cycleway.
- Some consultees indicated that although they provided and maintained the infrastructure they did not or could not get involved with marketing as this was the responsibility of another department or organisation. Some indicated they had previously had a marketing budget but no longer did and that it had proved very difficult to secure funds for marketing activity.
- Some authorities organised events and themed activities to encourage visitors and groups to use their sections of the route as part of authority-wide green space and countryside festivals.
- Overall the current marketing of the sections of the route is probably best described as low key, although the Falkirk area has a suite of brochures publicising its routes and providing excellent guidance for users e.g. Walk, Ride and Cycle Around The Falkirk Wheel and South Falkirk, Discover the Path Networks In and Around Bo'ness and Blackness and Discover the Frontiers of the Roman Empire – The Antonine Wall (a series of short walks to access the World Heritage Site).

Connected to the three points above, it is worth noting that direct contact with economic development staff was limited (with one or two exceptions) and our general impression is that the current routes do not feature strongly on the economic development agenda. If it is possible to progress with the new route, then it is suggested that it will be important to secure the buy in of economic development staff to ensure the route has access to marketing budgets and is viewed as part of the local tourism portfolios. Economic development staff facilitated contact with the main attractions at Balloch and Drumkinnon Bay on Loch Lomond indicating that where access officers and economic development staff work closely, the result can be beneficial.

6. PROFILE OF EACH SECTION OF THE JMC2C

6.1. Introduction

The profiles are based on analysis of a range for the 80 postcodes which cover the route of the JMC2C. The postcode districts and their correlation with route sections are shown in Table 6.1.

Table 6.1

JMC2C Sections In Relation To Postcode Districts

Balloch-Helensburgh	G84 7	G83 0			
Balloch-Strathblane	G63 9	G83 8			
Strathblane-Kilsyth	G66 1	G62 7	G64 4		
	G66 2	G62 8			
	G66 3	G66 8			
	G66 7				
Kilsyth-Linlithgow	FK2 0	FK1 1	FK4 1	G68 0	
	FK2 9	FK1 2	FK4 2		
		FK1 4	G65 0		
		FK1 5	G65 9		
Linlithgow-Cramond	EH30 9	EH49 6	EH51 0		
		EH49 7	EH51 9		
Cramond-Musselburgh (Edinburgh)	EH15 1	EH16 4	EH9 1	EH3 8	EH4 1
	EH15 2	EH16 5	EH12 5	EH3 9	EH4 2
	EH15 3	EH10 4	EH12 6	EH8 7	EH4 3
	EH11 1	EH10 5	EH12 7	EH8 9	EH4 4
	EH11 2	EH14 1	EH12 8	EH4 6	EH4 5
	EH11 3	EH14 2	EH4 8	EH4 7	
Musselburgh-North Berwick	EH31 2	EH32 0	EH21 6		
		EH32 2	EH21 7		
		EH32 9	EH21 8		
North Berwick-Dunbar	EH42 1	EH40 3	EH39 4		
			EH39 5		
Kelvin Way (Glasgow)	G20 0	G12 0	G3 6	G11 5	
	G20 6	G12 8	G3 7	G11 6	
	G20 8	G61 1	G3 8	G64 3	

A detailed profile of each section of the route is provided in Appendix 3. It should be noted that a small number of postcodes cross local authority boundaries. This section provides a summary of the overall findings for the route as a whole. The metrics assessed are as follows:

6.2. Population of each section of the JMC2C

Based on postcode analysis and 2001 Census data it is estimated that there are 549,830 residents in the 80 postcode districts through which the route is currently proposed to travel.

6.3. Businesses Profile of the JMC2C

Based on analysis of 80 postcode districts, there are estimated to be 2,740 registered businesses in appropriate service related categories located in the postcode districts through which the route is currently proposed to travel. A summary is provided in Table 6.2

Table 6.2

Breakdown Of Businesses On JMC2C Route By Type

	Dunbar –North Berwick	North Berwick-	Musselburgh-Cramond	Cramond-Linlithgow	Linlithgow-Kilsyth	Kilsyth-Strathblane	Strathblane-Balloch	Balloch-Helensburgh	Kelvin Way	**Total**	**% of Total**
Restaurants and Eateries	29	65	358	32	117	32	13	15	182	843	30.7
Shops and Services	48	64	325	48	105	55	22	14	155	836	30.5
Accommodation	29	26	174	11	17	4	36	7	51	355	12.9
Pubs Bars &Nightclubs	7	16	96	10	39	9	7	8	52	244	8.9
Sports & Leisure Facilities	20	27	81	19	34	19	8	9	22	239	8.7
Transport	11	31	20	9	29	7	2	9	6	124	4.5
Other	2	13	37	2	16	9	4	1	15	99	3.6
TOTAL	146	242	1,091	131	357	135	92	63	483	2,740	
% of Total	5.3	8.8	40.0	4.8	13.0	4.9	3.4	2.2	17.6		100

The most numerous types of businesses are Restaurants/Eateries and Shops/Services accounting for 30.7% and 30.5% respectively of the total identified. Some 12.9% of businesses are Accommodation. Not surprisingly almost 40% of businesses are found on the Musselburgh to Cramond section which runs through the City of Edinburgh.

The sections with fewest businesses are those of a more rural character including Balloch to Helensburgh, Strathblane to Balloch, Kilsyth to Strathblane and Dunbar to North Berwick, with each of these sections accounting for less than 5% of the total businesses found along the route. The relative scarcity of businesses on the three sections comprising Kilsyth to Helensburgh is perhaps a cause for concern in terms of servicing visitor's needs and in particular the lack of accommodation on the Kilsyth to Strathblane and Balloch to Helensburgh sections is worth highlighting.

6.4. Visitor Attractions on the JMC2C

Based on available attractions data[25], there are estimated to be 57 visitor attractions located in the 80 postcode districts through which the route is currently proposed to travel and for which visitor numbers are readily available.

There are estimated to be 9,794,254 annual visits to attractions located in the 80 postcode districts through which the route is currently planned (Table 6.3).

Table 6.3

Distribution Of Visitor Attraction And Visitor Numbers

Sector	Number of attractions	Visits to Attractions
Helensburgh - Balloch	5	483,058
Balloch - Strathblane	2	630,898
Strathblane-Kilsyth	3	63,208
Kilsyth - Linlithgow	5	1,358,804
Linlithgow - Cramond	14	587,521
Cramond-Musselburgh	10	3,329,337
Musselburgh-North Berwick	5	326,887
North Berwick - Dunbar	7	588,927
Glasgow	6	2,425,614
TOTAL	**57**	**9,794,254**

Source : Scottish Visitor Attractions Monitor 2009 and postcode analysis

The numbers at visitor attractions is likely to be underestimated as some attractions do not publish visitor numbers, including Dunbar Castle, Auchinstarry Marina and Hopetoun House.

6.5. Overall Profile of Each Section of the Route

The overall profile of each sector of the proposed route is shown in Table 6.4.

Table 6.4

Overall Profile Of Each Section Of The Route

Sector	Population	Number of postcode districts	Number of businesses	Attractions	Visits to attractions
Helensburgh - Balloch	13,378	2	63	5	483,058
Balloch - Strathblane	11,320	2	92	2	630,898
Strathblane - Kilsyth	41,712	8	135	3	63,208
Kilsyth - Linlithgow	81,193	11	357	5	1,358,804
Linlithgow - Cramond	41,011	5	131	13	587,521
Cramond - Musselburgh	227,815	29	1,091	10	3,329,337
Musselburgh - North Berwick	43,038	7	242	5	326,887
North Berwick - Dunbar	19,057	4	146	8	588,927
Kelvin Walkway	71,306	12	483	6	2,425,614
TOTAL	**549,830**	**80**	**2,740**	**57**	**9,794,254**

Sources : Scottish Census 2001, VisitScotland and SVAM 2009

The JMC2C is located in an area of Scotland where:

- There is a high population
- There are large numbers of service businesses
- There are large numbers of well used visitor attractions

All of these factors should combine to ensure that if established, the potential level of usage of the route and its subsequent economic impact could be substantial for many of the locations along its length.

7. MARKETING AND PROMOTIONAL PLAN

7.1 Introduction

A key task specified in the brief was to

"Make recommendations for ways to maximise benefits to local economies, such as marketing strategies, signage approaches, access points/gateways and links to the route, information points, support to local businesses, etc, based on successful approaches adopted elsewhere"

At the inception meeting it was agreed that the current study would focus more on marketing and promotion as a parallel technical study was being undertaken by Donaldson Environmental Consultancy into development and infrastructure requirements. Therefore we address mainly the marketing and promotional requirements for the route which will generate user interest and consequent economic impact for local businesses.

7.2. Would the Route Attract Coast to Coast Users?

The data presented in the economic impact analysis is based on an assumed level of visitor market penetration. It assumes that people will use the route. But will they? In her 2008 report on LDRs for SNH[26], the countryside management consultant Vyv Wood-Gee identified the main factors affecting the success of LDRs. These factors included:

- Credible recognised route - e.g. West Highland Way, Great Glen Way
- Length of route – the most successful take less than a week to complete
- Iconic landscapes – spectacular scenery is more appealing than historic landscapes
- Visual variety along the route – changing vistas and views
- Historic and other interest - important in inspiring and sustaining the interest of users who might not otherwise think to use an LDR
- Wildness - Routes which offer a feeling of "wildness" are more popular than those through more urban or populated areas, although the appeal of routes which are too remote is limited to the most determined users.

Vyv Wood-Gee concluded that the most notable of the success characteristics appears to be that LDRs need to:

- be readily accessible to large numbers of people (with easy public transport links for walkers and cyclists);
- present sufficient challenge to be satisfying but without being too arduous for less fit users;
- be achievable within 3-4 days;
- require no previous skills or experience;
- have significant heritage or other interest over and above the physical achievement of completing the route.

Vyv Wood-Gee concluded that:

"Although readily accessible to large numbers of people and public transport nodes, and with potential to include features, sites and existing routes of historic and other interest, a Central Scotland LDR fails to meet some of the other criteria identified as common to most successful LDRs. Most significant of these is that relatively few people are likely to consider the Central Lowlands of Scotland to be an iconic landscape."

As currently proposed the JMC2C possesses several of the essential characteristics, although the current estimated length at 6 days may be too long for many potential users. However thanks to ease of access to the route they have the option to undertake the route in sections if required. Conversely, 44% walkers on the West Highland Way spend more than seven nights on the route, although the scenic qualities of this route may be more conducive to longer visits than would be the case on the JMC2C.

The JMC2C does not generally offer a "wilderness" experience. Consultation respondents indicated that the main "wilderness" landscapes are those located towards the Loch Lomond end, although there is no doubt that the Falkirk Wheel, the Forth Bridges and the East Lothian coast are iconic structures and iconic landscapes in their own right. This is not necessarily a negative feature and indeed may be something of a competitive advantage for the JMC2C, offering a Scottish LDR which is diverse in character and distinctive from existing "wilderness" routes such as the West Highland Way. There is some evidence that LDRs with a predominately urban and rural character, rather than wilderness in nature, are also attractive - data from the Thames Path, with its mix of London and rural landscapes, indicates that 11% of end to end users intend to complete the entire length in one trip.

The JMC2C does not, as yet, offer a recognised route. Developing a distinctive route brand which is credible, which has coherence from east to west and which differentiates the route from the many other route brands which already overlay it (such as the Millennium Link, Three Lochs Trail, John Muir Way) is therefore important in positioning the route in the perception of future visitors.

No market research has been undertaken so far to establish:

- If the proposed route would be attractive to long distance users
- What percentage of them may use it
- What would have to be done to encourage them to use it

Prior to considering the detailed marketing strategy, we therefore consider the issues arising from our consultations regarding the need to develop a strong, recognisable and agreed brand for the JMC2C.

7.3. Branding the Route

Some Scottish LDRs have been successfully branded – the West Highland Way for example, is known worldwide as being one of Britain's premier LDR routes. Similarly, the name of the Great Glen Way is inspiring and allows visitors to pinpoint exactly where it is located. The overall impact has been to reinforce as walking one of Scotland's most popular visitor activities [27].

The working title for the JMC2C route has been the "John Muir Trail" in honour of the Scots born father of the National Parks movement in the USA. There are varying reasons why it is felt that this name may be appropriate, mainly the fact that 2014 will be the centenary of his death and that the route may be reminiscent of that which John Muir followed as a boy upon his emigration (although some consultees regard this as somewhat spurious as it is believed that Muir travelled by train to Glasgow then by steamer to Greenock and has no tangible connection with most of the locations along the proposed JMC2C beyond East Lothian). As part of our consultations we undertook to investigate the views of consultees on this proposed brand name for the route.

7.3.1. Pros and Cons of the John Muir "Brand"

In our consultations, we frequently encountered strong and varying views on this title. Those who support it stress that:

- John Muir is a Scottish giant in the field of international landscape conservation
- There is a view that the route may parallel to some degree his journey as an émigré from Dunbar to his departure port, although it is not certain whether this was Glasgow or Greenock
- It is an appropriate way to promote John Muir in his native land and to raise awareness of him in Scotland
- The route could be finished by 2014, the centenary of his death
- This would be the third John Muir Trail – the others are the famous 211 mile route in the Sierra Nevada Mountains in California, with the second being a shorter 21 mile recreational trail in Tennessee

Although there was unanimous support for celebrating and commemorating John Muir, there are a number of reasons why this particular route was not regarded by some residents as the appropriate vehicle to achieve this. These are:

- The link to John Muir is tenuous for most of the proposed route – he travelled by train and has no relationship with most of the route
- Visitors associate John Muir with wilderness and may expect the route to offer a wilderness experience
- Plainly it does not as it passes through cities, towns, archaeological and former industrial sites
- The only part of the route where it offers a glimpse of remotely wilderness scenery is on the high route by Burncrooks Reservoir and over Stoneymollan between Strathblane, Balloch and Helensburgh
- There is potential for "brand overload" with other existing and recognised route marks and logos such as the BWS Forth and Clyde Canal and Union Canal logos, Millennium Link, West Highland Way, Antonine Wall and the Three Lochs Trail

7.3.2. Balance of Opinion

On balance, there is a broader view that whilst there is a need to celebrate and commemorate John Muir, there is a small majority who believe that associating his name with this particular route is not generally regarded as an appropriate choice, mainly because of its lack of genuine wilderness characteristics which visitors from overseas, and particularity the USA, might expect to find in a trail bearing John Muir's name. There is a divergence of opinion that the John Muir brand is appropriate for this route and this requires resolution at an early stage.

Vyv Wood-Gee reinforces this view. Relating to future LDR development in general, she says:

"The potential market for any future LDRs should be clarified at the feasibility study stage and demonstrated to potential route funders, so that route development can take into account the needs of the target market(s)."

In our view this indicates a need for further **research** to be undertaken with project funders and stakeholders, as well as **brand testing** with potential route users, prior to developing a preferred and agreed brand for the route. This research should include brand testing of the John Muir Way and assessment of all options.

7.4. Developing a brand presence for LDRs

Brand presence is central aspect of the success of LDRs.

- Research undertaken by Natural England in 2007 found that 11% of visitors surveyed were motivated to use an LDR route because it was a National Trail. The Fife Coastal Path is clearly valued by local businesses and 98% of those who participated in 2007 research considered that it a positive effect on their business.
- Research commissioned by the Countryside Commission for Wales in 2005 found that over one third of accommodation providers located on or near a National Trail described the Trail as 'very important to the profitability' of their business [28] and on average, accommodation providers attributed 36% of their turnover to the National Trail.
- Similarly, 73.3% of accommodation providers within one mile of the South West Coast Path consider it to be an important selling point for their business.
- Experience on the Jurassic Coast also indicated that when a strong, identifiable brand is developed, businesses respond positively - 92% of respondents to the Jurassic Coast World Heritage Site Survey indicated in 2008 that their businesses valued the UNESCO Jurassic Coast World Heritage Site status 'highly' or 'to some extent' whilst 67% of businesses on the Jurassic Coast had witnessed increased numbers of UK visitors as a result of the branding being developed. [29]

There are clear business and community benefits arising through effectively branded LDRs. Most consultees in the current study agreed that whilst local use will occur irrespective of whether or not the route is branded for all of its length, it is likely to be more important for longer stay visitors and for those who are undertaking a coast to coast transit, that an identifiable route brand is developed.

This has been illustrated in the Cairngorms National Park where 34% of day visitors regarded the fact that the Cairngorms is a national park as very important or quite important, whilst 45% of 1 to 4 night staying visitors and 63% of longer staying visitors regarded the national park brand as important.[30] In NNRs in Scotland, visitor recognition of the fact that the location was an NNR was high but recognition of the actual logotype was found to be low.[16] So it is questionable whether branding and logos are relatively more important than the fact that the route is recognised as a joined up entity in its own right. The increase in visitors on Hadrian's Wall is likely to be driven in part as a result of the excellent branding and supporting promotional materials developed in support of the route.

7.5. Brand Development for the JMC2C

Irrespective of what brand image is chosen, there will be a requirement to develop the brand for use in promotional items and activities in advance of the opening of the route. This will require:

- Consumer research
- Stakeholder research
- Creative brand design development
- Devising brand use guidelines
- Application of the brand to a range of products and services

Therefore we have included £35,000 for further market research and brand development costs in year 1 of the project.

7.6. Consultee comments regarding the Proposed Route

There was some confusion amongst consultees and differences of opinion about the location of sections of the route. Specific issues raised on several occasions were:

- It's not really coast to coast as Helensburgh is not the west coast "proper"
- Views that, as John Muir's family, when emigrating, took a train from Edinburgh to Greenock, the route has no relevance to him
- There is some belief that Muir actually sailed from Glasgow and not Greenock
- A surprise that the route went to the north bank of the Clyde and not the south to Greenock, from where Muir may have sailed for America.
- A view that as Muir has strong associations with national parks, then the route should end in a national park and not continue to Helensburgh
- The most "wilderness" part of the route, across the Kilpatrick Hills, is not currently accessible and is unlikely to be so until around 2014

These views reflect a range of diverse opinions and views which require clarification both on the actual route and on the rationale for the use of the John Muir association, hence the need for further stakeholder consultations and research prior to agreeing:

- If the use of the John Muir "brand" is appropriate
- If it is not, then what might be a suitable alternative

7.7. Identifying the User Markets

Based on our discussions with access officers and other LDRs elsewhere, it is apparent that the main economically active visitor market for LDRs is comprised of two main market segments. These are:

- Staying Visitors (including coast to coast users)
- Local or Day Visitors

On a route such as the JMC2C where there is a large local population, there will be high levels of “local “ use i.e. regular visitors for the purposes of dog walking etc who are not economically active. The methodology used effectively screens these users out and focuses on the key economically active markets. This section assesses the main markets and the marketing activities required to address them.

7.7.1. Staying Visitors

This segment includes:

- Visitors **staying** in an given area as part of a wider holiday or short break
- Special interest groups e.g. ornithologists, wildlife or history enthusiasts
- Visitors who are “bagging” the entire coast to coast route from Dunbar to Helensburgh or vice versa
- LDR enthusiasts

The staying visitor market for the route is comprised of three segments as follows:

- Visitors using serviced accommodation (i.e. hotels, B&Bs etc)
- Visitors using self catering accommodation
- Visitors staying with friends and relatives (VFR market)

These markets are competitive – there are many other attractive and wild LDRs in the UK many of which offer greater drama of scenery and wilderness environment than the JMC2C. So to address these markets, a range of online and offline marketing tactics are required although specifically which ones are to be delivered depends on available financial resources.

Coast to coast visitors will be undertaking the coast to coast route on foot or by cycle and are likely to be attracted by the appeal of the entire route. Based on user profile of other LDRs elsewhere, they may be older and tend to use LDRs frequently. With the right offer and visitor experience, they represent the key target market. There are currently no identified coast to coast users on the route, so it will require a significant marketing effort to raise the profile of the route to the degree where it becomes established as a “must do” LDR.

7.7.2. Local or Day Visitors

This segment includes:

- **Local Visitors** from the immediate vicinity – including dog walkers, joggers, general public staying in cars or undertaking a two minute walk - visitors from whom there may be little economic spin off
- **Day visitors** from further afield (e.g. in the three hour trip time used in STEAM analysis) who are on a day trip and are likely to spend in the local economy as part of their day out.
- Educational groups, many may be local but in some cases may visit a particular feature of the route as part of their formal education (e.g. to sections of Antonine Wall)

According to consultees, use by local and day visitors is not particularly dependent upon brand awareness with enhanced access creating greater demand for access to the countryside.

7.8. Targeting marketing resources

Staying visitors generate the greatest expenditure. Local users are unlikely to generate as much on average whilst day visitors may visit anyway, even in the absence of a new brand for the route. Based on the expenditure values used in the economic impact sections earlier in this report, it is feasible that if the route is adequately developed and promoted, there is potential for expenditure of around £2.9 million of direct expenditure from coast to coast users alone in year 1. On balance therefore, it is recommended that the marketing strategy focuses almost exclusively on those users which may be interested in undertaking the coast to coast transit.

7.9. Required Consumer research

At the present time, no consumer research has been undertaken to advise the project promoters on:

- How attractive the JMC2C would be to the key target market
- What their response is to it as an LDR offer
- What they might expect to experience on a visit
- What would the JMC2C need to offer to make it an LDR which can compete with the many others which are available

We therefore echo the comments of Vyv Wood-Gee regarding the need to assess the potential market at the viability stage and have incorporated a cost element in the pre-opening marketing costs for required user research.

7.10. Marketing Strategy

Raising awareness of the route and its attractions can be effectively undertaken through a range of online and offline marketing techniques. This section sets out examples of the marketing tools to be employed.

7.10.1. Online Presence

a) The Route Website

There is anecdotal evidence from our consultations and evidence from available surveys to suggest that a strong and well branded website which is readily found using search engines is the essential starting point for promotion of routes of any distance. The website should be:

- High on search engine rankings
- Dynamic – regular updating of content
- Inspirational – through attractive powerful, welcoming and enthusing imagery which makes visitors want to be there. A great example is Hadrian's Wall

- Informative – everything from current weather to detail on what to see, where to go and what to do
- Well linked – to relevant third party websites
- Online sales – of hard copy of the companion guide and other relevant products
- Downloads – websites have readily downloadable information sheets which can be printed and taken with you
- Navigable – alphabetical listings of places and things to see along the route
- Enquiry facility – which is responded to quickly via an effective response handling mechanism
- Contacts – to VICs, enquiry handling mechanism etc
- Visit Planner – a facility to help coast to coast users plan their itineraries – used on websites such as Go Lakes
- Encourage visitor feedback using mechanisms such as forums and Trip advisor

b) Web 2.0 and Social Media

The JMC2C should develop ongoing relationships with groups of "supporters" through development of Facebook and Twitter sites which allow regular news items to be distributed about events and activities along the route and which allows route users to engage with each other and share their experiences as they use the route.

c) iPhone or Android applications

The JMC2C should be promoted via applications for iPhone or Android 3G mobile phones, based on the website content, which can be downloaded as a virtual companion guide to complement the hard copy version of this document.

d) Links to Third Party Sites

JMC2C content should regularly be added to high traffic websites such as VisitScotland.com and walkscotland.com and web linkages with other local tourism businesses, accommodation providers and attractions along the route should be developed.

7.10.2. Print Based Marketing Resources

Online activities should be supported through a range of print based promotional materials as follows:

- Production of a Companion Guide which readily fits walking and cycling gear. The production run should ideally cover two years print requirements. Based on comparator this could cost around £6,000 gross and would be likely to attract advertising support
- Production of a summary 1/3 A4 or A5 illustrated route leaflet for racking in accommodation and business outlets, used for mail shots and made widely available in VICs etc
- Distribution of the leaflets around accommodation outlets and information points in Central Scotland can be undertaken using a distribution company such as EAE or Direct Distribution.

7.10.3. Local and Day Visitor Use

Ensuring that residents are aware of the route as a recreational and leisure resource and as a place to visit will be important in securing local buy in. However it is likely that local and day visitor use will happen anyway and that little additional effort or resources are required to attract this audience. Indeed it is possible that they will use the existing parts of the route even if no route branding is applied.

a) Day Visitors

There is scope to attract additional day visitors to the route to walk or cycle short lengths. A number of marketing tactics are suggested:

- Insert the promotional leaflet in local newspapers at certain times of the year e.g. Easter
- Local PR – generate one good story per month for local media consumption
- Incentives e.g. off season two for one deal in partnership with businesses and attractions along the route
- Develop local events linked to specific environmental issues and nature cycle – some councils already run such programmes in their areas
- Develop seasonal events
- Work closely with public transport operators to encourage use of shorter sections

b) Education Groups

School children are key drivers in deciding where adults should go for a day out. There are a number of ways that children and teachers can be made aware of the JMC2C and its attractions. These include:

- Leaflet drop to all primary schools via local authorities in each area
- Use of a schools based distribution channel such as Bags of information (offered via PPD) to provide school children with free information on the route
- Talks on the route and its health giving and educational values for groups of local teachers and PTA's
- Incentives for teachers visits and activities
- Developing content for the GLOW network through working with Education Scotland and local teachers

c) Special Interest Groups

The JMC2C is a haven for wildlife along its length, ranging from the hidden parts of the Millennium Link to the wilder moorlands of the Kilpatrick Hills and attracts special interest groups with specific wildlife interests. It is also a source of great archaeological interest and there is scope for promotion of its attractions and sites of interest to local enthusiast groups. Groups such as the Forth and Clyde Canal Society are already highly active in taking advantage of the route and engagement with them will lead to repeat usage from locals and visitors from further afield.

7.10.4. Collaborative Approach to Marketing

The JMC2C route should collaborate with local attractions, visitor facilities, transport operators and local guest houses and other serviced accommodation outlets could work together to form a marketing consortium could undertake the following PR activities:

- PR stories
- Mail shots
- Joint viral campaigns
- Joint promotions with other family attractions on the route

7.10.5. Evaluation

Knowledge of visitor's views, opinions, wants and needs is central to effective marketing. The JMC2C should put in place evaluation mechanisms for obtaining regular visitor feedback. These could include:

- Visitor Feedback section on the route website
- Ongoing Visitor Surveys on the route – can be online and easy to set up.
- Use of customer review websites such as TripAdvisor

7.11 Marketing and Promotional Plan Costs and Revenue

This section considers the costs of the marketing plan and scope to offset the costs through attracting revenue to support the programme.

7.11.1. Marketing Costs

Based on the above outline marketing plan the indicative marketing costs over a five year period are as shown in Table 7.1.

Table 7.1

Indicative Marketing Costs

	Gross Costs (approx)					
Item	**Year 1**	**Year 2**	**Year 3**	**Year 4**	**Year 5**	**Total**
Brand development	£35,000					£35,000
Companion Guide	£6,000		£4,000		£4,000	£14,000
Promotional leaflet	£2,500	£1,000	£1,000	£1,000	£1,000	£6,500
Distribution	£3,000	£3,000	£3,000	£3,000	£3,000	£15,000
Website	£10,000	£5,000	£5,000	£5,000	£5,000	£30,000
Local PR	£5,000	£5,000	£5,000	£5,000	£5,000	£25,000
Evaluation	£3,000	£3,000	£3,000	£3,000	£3,000	£15,000
TOTAL	**£64,500**	**£17,000**	**£21,000**	**£17,000**	**£21,000**	**£140,500**

Leaflet costs have been provided on the basis of an actual quote sourced for design, print and production from a local supplier and the estimated cost of the Companion Guide is based largely on that of the West Highland Way and should be self financing through advertising. Both publications will incur development costs up front and revisions on a regular basis with new print runs being required as stocks are depleted.

With regard to the website, the initial design costs are incurred in advance of the route opening and thereafter content should be controlled by the route managers with small scale design changes and additions taking place as required.

7.11.2. Scope for Revenue generation

It is likely that many of the above costs can be offset through generation of advertising revenue from local business or sponsorship. The cost of for example, the Companion Guide, could be completely offset through advertising income as could much of the website costs in years 2 and beyond, following initial setup.

We have not however, attempted to make estimates of the potential revenue values as this would require some brand testing of the whole route concept with potential advertisers and local businesses.

7.12 "Walkers Are Welcome" Towns

There are 70 Walkers are Welcome towns in Great Britain. Two of them, Kilsyth and Kirkintilloch, lie on the JMC2C. Kilsyth currently claims to offer:

- 50 km of signed and surfaced paths
- 50 km of rough grass rights of way
- the best stretch of the Roman Antonine Wall
- Forth and Clyde Canal and Auchinstarry Basin
- Kilsyth Hills and Campsie Fells
- Woodlands, wetlands and wildlife

Walkers are Welcome is a community led scheme which strengthen a town's reputation as a place for visitors to come to enjoy the outdoors, bringing useful benefits to the local economy. Unlike many other LDRs which pass through few towns, the JMC2C is well placed to take advantage of this scheme and engage towns such as Linlithgow, Musselburgh and Falkirk to ensure that route promotional efforts are underpinned by community led support.

7.13. Horses Welcome

The British Horse Society manages a "Horses Welcome Scheme". This is a quality assured scheme for equine "bed and breakfast accommodation" aimed at people who want to holiday with their own horse either in a single location or as part of a trip stopping off at various locations. Rider accommodation is also provided. All Horses Welcome premises are inspected to ensure that the stabling, grazing and other facilities are of a suitable standard for visiting horses. The scheme undertakes central marketing activity.

The Horses Welcome website (www.horseswelcome.org) lists some 28 establishments in Scotland, with concentrations in the Borders and Highlands. The only Horses Welcome establishment close to the proposed JMC2C route is at North Berwick. This website also lists 27 suggested routes, ranging from over around 4km to over 100km. Many of those are based around the Tyne Esk Trails, Parkpaths in LLTNP and those on the South of Scotland Countryside Trail network. None of those listed is close to the proposed JMC2C route, although there area three routes to the north of Drymen.

Comments re the suitability of the proposed JMC2C route for equestrian use will be given in the technical survey. It is expected that this will conclude that although there are several nodes where equestrian activity is possible and could be encouraged, the route as a whole is not suitable as a horse riding trail. In any event horse riders usually prefer circular routes. On the basis of the current lack of Horses Welcome participants, we would also concur that the route could not be promoted for such use. In the future, it may be that farms and livery yards identify business development opportunities associated with the route and it may be that certain sections can be developed and promoted as longer distance equestrian routes with suitable overnight accommodation for horse and rider.

A recent study into equestrian activity and equestrian tourism in Falkirk and West Lothian (2010)[31] concluded there was perhaps less scope for and interest in developing long distance routes than had been anticipated but there was potential to develop nodes of activity around Beecraigs/Oatridge/Hopetoun and Falkirk.

7.14. Route Infrastructure

We have not considered the infrastructure requirements in detail as this is largely being addressed in the technical study undertaken by Donaldson Environmental Consultancy.

8. CONCLUSIONS AND RECOMMENDATIONS

This section sets out our conclusions from consultations and analysis of the available data.

8.1. The Proposed Route

- There is potential to generate significant economic impact from the establishment of the JMC2C LDR
- The proposed route is strongly supported by local authorities at office level and in some cases, at elected representative level
- There remains some lack of clarity over some of the specific routes to be taken in certain areas
- However there is a need to develop a consensus on the possible association of the route with John Muir
- The route already generates significant economic impact for the areas which it passes through, probably from local and day visitor use even though it does not exist as yet, as an official LDR.
- Establishing it as an official LDR would generate potential for significant incremental economic impact from coast to coast users.
- It is likely that local usage will continue to grow irrespective of whether or not the route is established as an official LDR
- However there is a need for market research to indicate how the staying visitor market, and in particular the coast to coast users would regard it as an LDR "offer"

8.2. Weaknesses in Data

In her commissioned report no 274 for SNH in 2008, Vyv Wood -Gee commented that:

"Reliable statistics that clearly demonstrate the role and use of LDRs are critical to securing funding and support to develop, maintain and promote routes"

In the course of the study, we experienced a range of issues relating to the quality of available data on Scotland's footpaths and LDRs. These are:

- Data gathered on most routes is of poor quality, inconsistent, insufficient in content and not replicable on a year to year basis to allow accurate quantification of user numbers or user types on an ongoing basis and across Scotland
- Where user data is gathered it is inconsistent and does not give a broad picture across all of Scotland meaning that comparisons between small sections and entire LDRs are not possible.
- Data is often incomplete due to broken counters or inability of counters to function in extreme weather conditions
- Visitor surveys are not standardised and often focus on the cosy touchy feely stuff rather than the hard economic impact – there should be standard survey questions set which also includes visitor profile and expenditure questions
- Major surveys have been commissioned which, incredibly, do not ask fundamental questions of route users such as – are you an end to end user or expenditure questions – how much are you spending per day?

- On that basis the project developers have no idea of the economic impact or value for money of the developments which they are funding and no benchmarks against which to compare projects
- The Millennium Link and West Highland Way are honourable exceptions where reasonably good quality count data is maintained whilst the Southern Upland Way has reasonable data but is not analysed on an ongoing basis
- Hadrian's Wall represents best practice with regular count data collected, visitor surveys undertaken regularly giving the capability to undertake comprehensive economic impact on a regular basis.

This research can be expensive. Fife Coast and Countryside Trust commissioned extensive research on the route on the FCP between July 2005 and June 2006 at significant cost and included research with users, businesses, local people and also questions in national level surveys, counts at 18 points along the route and focus groups. The West Highland Way undertakes regular counts and surveys but appears that it is generally the case that information on LDR user numbers, user profile and economic impact is generally extremely poor or, in most cases, non existent.

However we would echo the comments made by Vyv Wood-Gee in relation to data requirements and we have made several recommendations on how to address this weakness.

8.3. Recommendations

Specifically in relation to the JMC2C:

- Further research should be undertaken into the route branding and association with John Muir possibly through testing with focus groups of potential users
- There is a requirement for consumer research to be undertaken on the route proposals
- Confirmation of the final route options should be developed as quickly as possible

In relation to wider issues of data quality and assessment of economic impact on LDRs

- There needs to be national agreement on what data is to be collected, where and how often
- There should be standard survey questions set for all routes which include visitor profile and expenditure questions
- A cost benefit model should be developed which provides comparisons of impact and value for money for existing and proposed routes
- Creation of strong links is required between the providers of the infrastructure and staff involved in economic development or tourism order to ensure that the route is an integral part of the tourism strategy in each area.

APPENDIX 1 ESTIMATED EXISTING ECONOMIC IMPACT IN EACH LOCAL AUTHORITY AREA

Area	East Lothian	Edinburgh	West Lothian	Falkirk
Urban Rural Classification (as used in Scotland's People)	**Accessible rural**	**Large urban**	**Accessible small towns**	**Other Urban**
Serviced Accommodation	171,270	2,051,590	121,190	211,230
Non-Serviced Accommodation	120,090	404,010	17,620	7,520
SFR	123,900	547,210	195,320	173,300
Day Visitors	971,720	10,221,130	829,400	235,960
Total Tourist and Day Visitor Numbers	1,386,980	13,223,940	1,163,530	628,010
Market penetration rates*				
Tourists (from TIS Walking Tourism OfG1)	58%	58%	58%	58%
Likelihood to use JMC2C (based on access, other routes and open spaces etc)	60%	1%	40%	90%
Day Visitors				
Potential Day Visitors Penetration Factor (from Scotland's People SHS 2009-10 Table 11.15 see note 1)	61%	69%	68%	67%
Potential Day Visitors	592,749	7,052,580	563,992	158,093
Likelihood to use JMC2C (based on access, other routes and open spaces etc)	50%	3%	23%	90%
Estimated Day Visitors	296,375	176,314	129,718	142,284
Estimated Actual users				
Estimated staying visitors	144,510	17,416	77,518	204,650
Estimated day visitors	296,375	176,314	129,718	142,284
Estimated Total Visitors	440,885	193,731	207,236	346,934
POTENTIAL USERS ON ROUTE (Local and C2C)	**1,861,878**			
Economic Impact				
Average Spend per Rural Day Visitor	£9.54		£9.54	
Average Spend per Rural Staying Visitor	£35.13		£35.13	
Average Spend per Urban Day Visitor		£1.24		£1.24
Average spend per Urban Staying Visitor (from average of EVS May 2010 and Glasgow and Carlisle city averages)		£69.38		£69.38
Direct Spend				
Rural or Urban Day Visitors	£2,827,414	£218,630	£1,237,511	£176,432

Rural or Urban Staying Visitors	£5,076,653	£1,208,343	£2,723,213	£14,198,624
Total Direct Spend	£7,904,067	£1,426,973	£3,960,724	£14,375,056
Type II multiplier (from Scottish Govt)	1.67	1.67	1.67	1.67
D+I+I	£13,199,792	£2,383,044	£6,614,409	£24,006,343
Employment multiplier (from ScotGov)	£38,461	£38,461	£38,461	£38,461
FTE	343	62	172	624
GVA ANALYSIS				
Total Direct Spend	£7,904,067	£1,426,973	£3,960,724	£14,375,056
GVA Ratio (%)*	42%	42%	42%	42%
GVA for section	£3,319,708	£599,329	£1,663,504	£6,037,523

Area	**North Lanarkshire**	**Stirling**	**East Dunbartonshire**	**West Dunbartonshire**
Urban Rural Classification (as used in Scotland's People)	**Other Urban**	**Accessible Rural**	**Accessible Small Towns**	**Accessible Rural**
Serviced Accommodation	279,090	564,430	110,410	143,010
Non-Serviced Accommodation	28,260	217,830	31,560	26,440
SFR	415,930	95,540	122,270	104,490
Day Visitors	940,560	2,973,820	256,510	553,150
Total Tourist and Day Visitor Numbers	1,663,840	3,851,620	520,750	827,090
Market penetration rates*				
Tourists (from TIS Walking Tourism OfG1)	58%	58%	58%	58%
Likelihood to use JMC2C (based on access, other routes and open spaces etc)	10%	1%	15%	50%
Day Visitors				
Potential Day Visitors Penetration Factor (from Scotland's People SHS 2009-10 Table 11.15 see note 1)	67%	61%	68%	61%
Potential Day Visitors	630,175	1,814,030	174,427	337,422
Likelihood to use JMC2C (based on access, other routes and open spaces etc)	50%	1%	30%	40%
Estimated Day Visitors	315,088	18,140	52,328	134,969

Estimated Actual users				
Estimated staying visitors	41,950	5,091	22,989	79,443
Estimated day visitors	315,088	18,140	52,328	134,969
Estimated Total Visitors	357,038	23,232	75,317	214,411
Economic Impact				
Average Spend per Rural Day Visitor		£9.54	£9.54	£9.54
Average Spend per Rural Staying Visitor		£35.13	£35.13	£35.13
Average Spend per Urban Day Visitor	£1.24			
Average spend per Urban Staying Visitor (from average of EVS May 2010 and Glasgow and Carlisle city averages)	£69.38			
Direct Spend				
Rural or Urban Day Visitors	£390,709	£173,058	£499,210	£1,287,600
Rural or Urban Staying Visitors	£2,910,508	£178,855	£807,599	£2,790,819
Total Direct Spend	£3,301,216	£351,914	£1,306,809	£4,078,419
Type II multiplier (from Scottish Govt)	1.67	1.67	1.67	1.67
D+I+I	£5,513,031	£587,696	£2,182,371	£6,810,960
Employment multiplier (from ScotGov)	£38,461	£38,461	£38,461	£38,461
FTE	143	15	57	177
GVA ANALYSIS				
Total Direct Spend	£3,301,216	£351,914	£1,306,809	£4,078,419
GVA Ratio (%)*	42%	42%	42%	42%
GVA for section	£1,386,511	£147,804	£548,860	£1,712,936

Area	**Argyll & Bute***	**Glasgow****
Urban Rural Classification (as used in Scotland's People)	**Remote Rural**	**Large Urban**
Serviced Accommodation	191,046	789,941

Non-Serviced Accommodation		158,408
SFR	94,251	1,093,485
Day Visitors	163,000	0
Total Tourist and Day Visitor Numbers	448,297	2,041,834
Market penetration rates*		
Tourists (from TIS Walking Tourism OfG1)	58%	58%
Likelihood to use JMC2C (based on access, other routes and open spaces etc)	1%	0.05%
Day Visitors		
Potential Day Visitors Penetration Factor (from Scotland's People SHS 2009-10 Table 11.15 see note 1)	52%	69%
Potential Day Visitors	84,760	0
Likelihood to use JMC2C (based on access, other routes and open spaces etc)	1%	1%
Estimated Day Visitors	848	0
Estimated Actual users		
Estimated staying visitors	1,655	592
Estimated day visitors	848	0
Estimated Total Visitors	2,502	592
Economic Impact		
Average Spend per Rural Day Visitor	£9.54	
Average Spend per Rural Staying Visitor	£35.13	
Average Spend per Urban Day Visitor		£1.24
Average spend per Urban Staying Visitor (from average of EVS May 2010 and Glasgow and Carlisle city averages)		£69.38
Direct Spend		
Rural or Urban Day Visitors	£8,086	£0
Rural or Urban Staying Visitors	£58,130	£41,082
Total Direct Spend	£66,217	£41,082
Type II multiplier (from Scottish Govt)	1.67	1.67
D+I+I	£110,582	£68,607
Employment multiplier (from ScotGov)	£38,461	£38,461
FTE	3	2

GVA ANALYSIS		
Total Direct Spend	£66,217	£41,082
GVA Ratio (%)*	42%	40%
GVA for section	£27,811	£16,433

Notes

**data for Helensburgh derived from 2008 SQW destination baseline analysis*
***data for Glasgow derived from 2010 SE baseline analysis*
Note 1 - % people in urban/rural areas using green spaces at least once per year

APPENDIX 2 STAKEHOLDER CONSULTATIONS

Research into John Muir Coast-to-Coast trail – Dunbar to Helensburgh

Route and LA	Rural/Urban Split	Number of Users	Types of Users	Profile of Users	User Spend	Annual Use	Trends	Businesses	Marketing
East Lothian	80% rural 20% urban Several railways stations	Some counter data provided - 3 for walkers and 1 for cyclists Car parking data provided for main coastal car parks No user surveys but would like to do one	JMW is a walking route but some sections are suitable for cyclists	No hard data Vast majority are locals doing short sections but do attract day trippers and repeat visits Maybe 1% do whole JMW	No spend data	Seems fairly steady and more so than local routes	Definitely increased interest and use and this is put down to branding as JMW and linking existing routes	Positive impact on businesses in East Linton in particular	Did provide leaflets but have run out and cannot get funding for reprinting. On website only now Local councilors favour the John Muir Trail name, staff less certain
Edinburgh	2/3s urban ¾ avoids traffic	No data for walkers Some data provided from 3 cycling counters No user surveys etc	Mainly walkers but with lots of cyclists A lot of regular commuters and dog walkers plus more infrequent leisure users Some sections much busier than others	No hard data A lot of commuters and other local use. Some holidaymakers but not generally day trippers	No spend data	Fairly steady but peaking in better weather	Increasing – investment in infrastructure, signposting and increased awareness	No evidence to suggest any new businesses as a result of route development – but perhaps the tearoom at Innocent Railway	No longer has a marketing budget this has all been centralised No issue with the John Muir Trail name but the new route must provide a quality route and experience
West Lothian	20% urban, 80% rural	No data, no visitor surveys Suggest BWW and CSFT	80% walkers – with dogs and/or families	No data but suspect 90% local No overnight	No spend data	Fairly steady	Does not know	Mainly in Linlithgow	Limited marketing budget overall and no specific budget or activity associated with

		might	NCR 76 Horses around Hopetoun						walking and cycling Some parts of the route are not even signed
Falkirk	30% urban and 70% rural inc some coast	No data, no visitor surveys Suggest BWW and CSFT might	Mainly walkers but cyclists on canals and horse riders on South Falkirk routes	No data but suspect high local use but with some day trippers from surrounding area. No overnight	BWS survey indicated average spend of £3.70 in 2005	Fairly steady but peaking in better weather	Think it is definitely upwards but no figures	Evidence suggests routes in South Falkirk have encouraged livery yards to establish or expand. A number of farm shops type operations have also sprung up	No dedicated budget but think they spend £15,000 - £20,000 a year and this will probably increase as infrastructure is now largely complete
North Lanarkshire	70% urban and 30% rural along canal	BWS counter data for Craigmarloch shows high levels of usage No surveys	Mainly walkers	No data	As above	High and increasing as new developments come on stream e.g. Auchinstarry Marina	Increasing	New businesses set up on basis of Millennium Link again, Auchinstarry Marina	BWS marketing of the Millennium Link and local attractions. Kilsyth is a Walkers Welcome town
Stirling	90% rural	Good counter data from Strathblane Cycleway but no user surveys	Mainly walkers but with quite a few cyclists	No hard data Day use but a mix of locals and day visitors	No spend data but Mugdock CP provided spend and profile data	Fairly steady but peaking in better weather	Although counters show downwards – impression is that it is busier than before	Limited provision in Killearn and Strathblane and Mugdock CP	Dept (Transportation) does not have a budget and does not really get involved with marketing
East Dunbartonshire	50% rural 50% urban Use of canal towpaths	Counter data from BWS	Likely to be mainly local but with visitor activity around Glasgow Bridge on the Canal	No data	BWS survey indicated average spend of £3.70 in 2005	No BWS counter in this area	Likely to be increasing as canal use increases.	Evidence from BWS impact study that the canal is generating new businesses and creation of business apace	BWS marketing of the Millennium Link and local attractions such as boat trips
Glasgow	100% Urban	No count data No survey data	Well used by local users, and groups undertaking leisure	No data but likely to be local and organised groups from within the city	No spend data	Steady and seasonal	Anecdotally, believed to be becoming more popular	Many businesses in the area but few on the actual route itself	Not actively marketed.

			activities driven by Glasgow's health lifestyle agenda						
West Dunbartonshire	Mainly rural but lochside and country park in areas of greatest visitor activity. Remote rural in Kilpatrick Hills	No counter data but there are large numbers of visitors to Balloch and Loch Lomond attractions.	Walkers and cyclists as the route joins up to the Loch Lomond Cycleway	Mix of day visitors, locals and major tourist traffic.	No spend data	Heavy year round use but probably seasonal in nature with summer peak	Very popular area likely to have potential for increased activity	Many tourist related businesses ranging from major attractions to small businesses – shops, restaurants and accommodation	None currently but attractions undertake their own marketing activity which attracts visitors to the area
Argyll and Bute	100% rural	No data available	No data available	No data available. Probably walkers as the route is similar to that of the Three Lochs Way	No spend data	No data available	No data available but likely to be increasing as the Three Lochs Way becomes better known	None until Helensburgh	Three Lochs Way is promoted via a comprehensive website and leaflet
LLTNPA – around park boundary in Balloch area	Rural – agricultural landscapes but with a busy loch side environment				As for West Dunbartonshire				
British Waterways Scotland (BWS)	Attractive route in urban and rural areas on Millennium Link towpaths	Provided available counter data for Forth & Clyde and Union Canal towpaths	High levels of local usage likely but there are tourism hotspots such as Falkirk Wheel and Linlithgow	No data	No spend data	Annual use is high – estimated around 2m visits over the year	Increasing	BWS have undertaken an impact study which shows that businesses have developed as a result of the opening of the Millennium Link	The Millennium Link is marketed strongly by BWS as are individual attractions such as the Falkirk Wheel. Other attractions do their own marketing with success e.g. the Forth and Clyde Canal Society
CSFT		Provided limited counter data for Rough							

		Castle Also provided perception surveys of greenspace 2005, 2007 and 2011 – useful in assisting with profile and what people do but no spend info

APPENDIX 3 BUSINESS PROFILE BY ROUTE SECTION

	Dunbar –North Berwick	North Berwick-Musselburgh	Musselburgh-Cramond	Cramond-Linlithgow	Linlithgow-Kilsyth	Kilsyth-Strathblane	Strathblane-Balloch	Balloch-Helensburgh	Kelvin Way	**Total**
Pubs, Bars and Nightclubs										
Bars – Mobile	0	0	1	0	0	0	0	0	0	1
Pubs	7	16	87	10	35	8	7	8	43	221
Night Clubs & Bars	0	0	6	0	3	1	0	0	4	14
Bars & Wine Bars	0	0	2	0	1	0	0	0	5	8
Total Pubs, Bars and Nightclubs	**7**	**16**	**96**	**10**	**39**	**9**	**7**	**8**	**52**	**244**

Shops and Services	Dunbar –North Berwick	North Berwick-Musselburgh	Musselburgh-Cramond	Cramond-Linlithgow	Linlithgow-Kilsyth	Kilsyth-Strathblane	Strathblane-Balloch	Balloch-Helensburgh	Kelvin Way	**Total**
Antique Dealers	2	3	11	3	0	1	0	0	9	29
Bakers - Retail	2	5	33	9	3	6	0	1	9	68
Book Shops	0	0	9	3	6	1	0	0	3	22
Books-Rare & Secondhand	0	0	3	0	2	0	0	0	3	8
Clothes Shops - Specialist	0	1	2	0	0	0	0	0	4	7
Cycle Shops & Repairs	2	0	11	0	2	3	0	1	3	22
Delicatessens	2	1	10	1	1	2	0	0	11	28
Drug Stores	1	1	5	1	2	1	0	1	1	13
Factory Outlets	0	0	1	0	0	0	0	0	0	1
Farm Shops	3	3	0	0	1	1	1	0	0	9
Fishing Tackle	1	0	2	1	0	1	0	1	0	6
Garden Centres	5	3	0	1	3	5	2	0	0	19
Gift Shops	12	7	29	2	9	4	4	0	13	80
Grocers & Convenience Stores	10	11	66	13	32	11	8	4	39	194
Health Food Shops	0	1	5	2	1	0	1	0	2	12
Mobile Phones & Accessories	0	0	14	0	7	1	0	0	8	30
New Age & Ethnic Shops	0	0	1	0	0	1	0	0	1	3
Newsagents	3	10	53	5	16	6	2	4	21	120
Pharmacies	3	15	48	7	19	9	2	2	17	122

Photographic Equipment	0	0	4	0	0	0	0	0	0	4
Pick-your-Own Fruit & Vegetables	1	1	0	0	0	0	0	0	0	2
Sandwich Shops & Delivery	0	1	12	0	1	1	0	0	8	23
Stained Glass	0	1	3	0	0	0	1	0	1	6
Riding Kit	0	0	1	0	0	0	0	0	0	1
Camping & Outdoor Equipment	1	0	0	0	0	0	0	0	1	2
Horse Supplies	0	0	0	0	0	1	1	0	0	2
Maps & Charts	0	0	2	0	0	0	0	0	1	3
Total Shops and Services	**48**	**64**	**325**	**48**	**105**	**55**	**22**	**14**	**155**	**836**

Restaurants and Eateries	Dunbar –North Berwick	North Berwick-Musselburgh	Musselburgh-Cramond	Cramond-Linlithgow	Linlithgow-Kilsyth	Kilsyth-Strathblane	Strathblane-Balloch	Balloch-Helensburgh	Kelvin Way	**Total**
Cafes & Coffee Shops	11	11	68	8	19	3	3	0	48	171
Internet Cafes	0	0	2	0	1	0	0	0	3	6
Fish & Chip Shops & Restaurants	3	8	31	3	17	4	1	2	4	73
Pizza Delivery & Takeaway	0	2	8	0	2	0	0	0	4	16
Restaurants - American	0	1	3	0	1	0	0	0	2	7
Restaurants - Bistros & Bars	0	0	2	0	1	0	0	0	3	6
Restaurants - Chinese	2	4	26	0	9	2	1	1	6	51
Restaurants - European	0	0	1	0	0	0	0	0	0	1
Restaurants - Fish & Seafood	1	1	1	0	0	0	0	0	5	8
Restaurants - French	1	0	4	0	0	0	0	0	1	6
Restaurants - Hotel Restaurants	0	1	0	0	0	0	0	0	0	1
Restaurants - Indian	2	3	21	4	4	2	0	0	25	61
Restaurants - Italian	3	3	22	1	1	1	2	0	17	50
Restaurants - Japanese	0	0	3	0	1	0	0	0	2	6
Restaurants - Mediterranean	0	0	0	0	0	0	0	0	1	1
Restaurants - Mexican	0	0	2	0	0	0	0	0	2	4
Restaurants - Pizzeria	0	0	5	0	0	0	0	0	1	6
Restaurants - Pub Food	1	3	7	0	8	1	0	0	2	22
Restaurants - Scottish	0	0	3	0	1	0	0	0	2	6
Restaurants - Spanish	0	0	2	0	1	0	0	0	2	5
Restaurants - Steakhouse	0	0	1	0	0	0	0	0	0	1
Restaurants - Thai	1	1	11	0	2	0	0	0	1	16
Restaurants - Traditional	0	3	8	3	3	1	2	0	3	23
Take Away Food	4	24	127	13	46	18	4	12	48	296
Total Restaurants and Eateries	**29**	**65**	**358**	**32**	**117**	**32**	**13**	**15**	**182**	**843**

Sports and Leisure Facilities	Dunbar –North Berwick	North Berwick-Musselburgh	Musselburgh-Cramond	Cramond-Linlithgow	Linlithgow-Kilsyth	Kilsyth-Strathblane	Strathblane-Balloch	Balloch-Helensburgh	Kelvin Way	**Total**
Adventure & Activity Centres - Children's	1	0	0	2	2	1	0	2	0	8
Amusement Parks & Arcades	0	0	3	0	0	1	0	0	1	5
Boat Hire	1	1	0	0	0	0	0	0	0	2
Bowling Centres	1	1	4	2	3	3	0	1	0	15
Fisheries (Sport)	0	0	0	1	3	1	0	1	0	6
Football Clubs	0	0	0	0	1	0	0	0	0	1
Golf Clubs, Courses & Professionals	8	10	14	4	6	7	1	0	0	50
Paintball & Combat Games	0	1	2	1	0	0	0	1	0	5
Outdoor Pursuits	0	0	1	1	2	2	4	0	0	10
Water Sports	1	0	0	0	0	0	1	0	2	4
Leisure Centres	2	5	12	2	5	1	1	0	3	31
Skating & Skateboarding	1	0	1	0	0	0	0	0	1	3
Sports Clubs & Associations	3	7	38	6	11	2	1	3	13	84
Sports Grounds & Stadia	0	2	3	0	0	0	0	0	1	6
Stables	1	0	0	0	0	1	0	0	1	3
Swimming Pools	1	0	3	0	1	0	0	1	0	6
Total Sports and Leisure Facilities	**20**	**27**	**81**	**19**	**34**	**19**	**8**	**9**	**22**	**239**

Transport	Dunbar –North Berwick	North Berwick-Musselburgh	Musselburgh-Cramond	Cramond-Linlithgow	Linlithgow-Kilsyth	Kilsyth-Strathblane	Strathblane-Balloch	Balloch-Helensburgh	Kelvin Way	**Total**
Taxis & Private Hire Vehicles	7	27	9	8	16	5	1	6	1	80
Train Information & Companies	2	3	3	1	5	1	1	3	4	23
Airport Transfers	2	1	4	0	7	0	0	0	0	14
Bus, Coach & Tram Companies	0	0	0	0	1	1	0	0	0	2
Car, Coach & Lorry Parks	0	0	4	0	0	0	0	0	1	5
Total Transport	**11**	**31**	**20**	**9**	**29**	**7**	**2**	**9**	**6**	**124**

Accommodation	Dunbar –North Berwick	North Berwick-Musselburgh	Musselburgh-Cramond	Cramond-Linlithgow	Linlithgow-Kilsyth	Kilsyth-Strathblane	Strathblane-Balloch	Balloch-Helensburgh	Kelvin Way	**Total**
Bed & Breakfast	2	3	14	0	2	2	9	0	2	34
Caravan Parks	5	2	1	1	0	0	2	0	0	11
Holiday Accommodation – Self Catering	3	1	8	3	2	0	5	0	2	24
Hostels	0	0	5	0	0	0	1	1	9	16
Hotels & Inns	14	14	58	2	11	2	9	1	29	140
Guest Houses	5	6	88	5	2	0	10	5	9	130
Total Accommodation	**29**	**26**	**174**	**11**	**17**	**4**	**36**	**7**	**51**	**355**

Other	Dunbar –North Berwick	North Berwick-Musselburgh	Musselburgh-Cramond	Cramond-Linlithgow	Linlithgow-Kilsyth	Kilsyth-Strathblane	Strathblane-Balloch	Balloch-Helensburgh	Kelvin Way	**Total**
Artists	0	0	6	0	3	2	2	0	4	17
Community Centres	0	5	13	0	10	4	0	0	4	36
Libraries	2	7	13	2	3	3	2	1	5	38
Theatres & Concert Halls	0	1	5	0	0	0	0	0	2	8
Total Other	**2**	**13**	**37**	**2**	**16**	**9**	**4**	**1**	**15**	**99**
TOTAL	**146**	**242**	**1,091**	**131**	**357**	**135**	**92**	**63**	**483**	**2,740**

EXPLANATORY NOTE

The above analysis is based on the number of **registered businesses** in each postcode area through which the proposed route runs and NOT in each local authority area as a whole. Examples – there are many bus and taxi firms in Edinburgh. However **very few** of them are located in the **specific** postcode areas being analysed. By contrast, it is likely that many taxis in East Lothian are small, often one person businesses. As such their place of business registration may fall within one of the residential communities, villages or towns which lie within the postcode areas under analysis and they accumulate to give a total number of taxi firms which is larger than those in the Edinburgh city postcodes analysed, few of which are city centre postcodes. Data analysis was undertaken by Business Lists UK, Macclesfield, Cheshire.

APPENDIX 4 LIST OF CONSULTEES

The following organisations and individuals were consulted in the preparation of this report.

Organisation	Name
• Argyll & Bute Council	• Jolyon Gritten
• British Waterways Scotland	• Richard Miller
• Central Scotland Forest Trust	• Stephen Hughes
• City of Edinburgh Council	• Bob McAllister
• City of Edinburgh Council	• Jenny Hargreaves
• City of Edinburgh Council	• Chris Brace
• City of Edinburgh Council	• Joanne Lennon
• Donaldson Environmental Consultancy	• Neil Donaldson
• East Dunbartonshire Council	• Kathleen McWhirter
• East Lothian Council	• Nick Morgan
• East Lothian Council	• Paul Ince
• East Lothian Council	• Elaine Carmichael
• Falkirk Council	• Angus Duncan
• Falkirk Council	• Mandy Brown
• Falkirk Council	• Ian White
• Falkirk Council	• Ian Ludbrook
• Fife Coast and Countryside Trust	• Amanda McFarlane
• Fife Coast and Countryside Trust	• Simon Philips
• Fife Coast and Countryside Trust	• Marta Ramage
• Forth & Clyde Canal Society	• Tommy Lawton
• Glasgow City Council	• Sue Hilder
• Hadrian's Wall Heritage Ltd	• Janine Howorth
• Helensburgh & District Access Trust	• John Urquhart
• Historic Scotland	• Robert Eckhart
• LLTNPA	• Gordon Forrester
• Loch Lomond Shores	• Clare Gemmell
• North Lanarkshire	• John Brinkins
• North Lanarkshire Council	• Hayley Andrew
• Mugdock Country Park	• Ian Arnott
• Pembrokeshire Coast National Park	• Dave MacLachlan
• Scottish Borders Council	• Keith Robeson
• Scottish Enterprise	• Eddie Brogan
• Scottish Government	• Tricia Weeks
• Scottish Government	• Stevan Croasdale

Scottish Natural Heritage	Rob Garner
Scottish Natural Heritage	Ron McCraw
Southern Uplands Partnership	Pip Tabor
Stirling Council	Penny Stoddard
VisitScotland	Xander Burgess
VisitScotland	Ranald Duff
Water of Leith Visitor Centre	Helen Brown
West Dunbartonshire	Elizabeth Hendry
West Dunbartonshire Council	Donald Petrie
West Lothian Council	Chris Alcorn
West Lothian Council	Anna Young
West Lothian Council	Eirwen Hopwood

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