



Scottish Rural Development Programme



The European Agricultural Fund for Rural Development: Europe investing in rural areas



Kelvin Valley and Falkirk LEADER

Canal by Bike Feasibility Study



Executive Summary



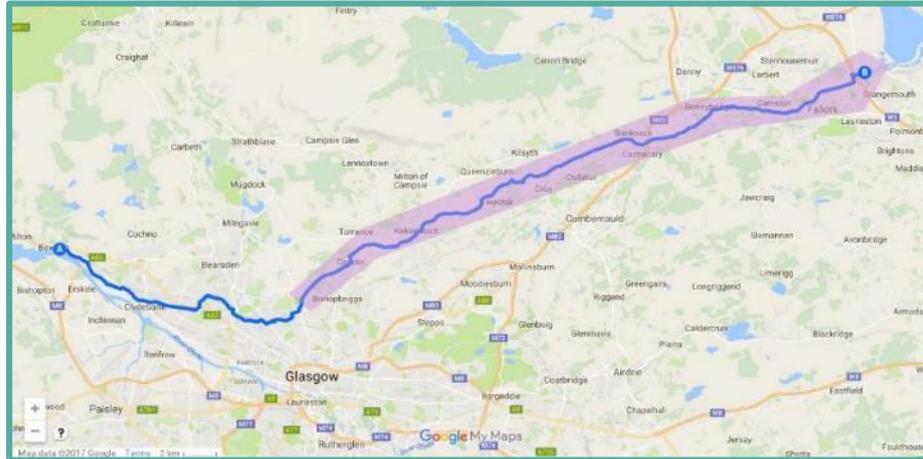
ESTD 2014
CYCLEHACK
GLOBAL MOVEMENT

9th June 2017

Executive Summary

Plan for Bikes Ltd was commissioned by Central Scotland Green Network Trust to investigate the feasibility of a Canal by Bike project, to develop cycle tourism on the Forth and Clyde Canal within the Kelvin Valley and Falkirk LEADER area (Figure 1, magenta shading).

Figure 1 – Study Area



There is clear potential to extend the study the full length of the Forth and Clyde Canal (blue line) and the Union Canal into Edinburgh. It is proposed that this could be progressed as a co-operation project with West Lothian and Forth Valley Lomond LEADER Local Action Groups.

Methodology

This study reports the first phase in developing the feasibility of the project and comprised four stages:

1. Desk based/ on site research;
2. Primary research and consultation;
3. Developing the elements; and
4. Funding and next steps.

The key findings of the study are summarised in this Executive Summary.

Vision

The emerging Vision of the Canal by Bike Project is that:

The Forth and Clyde Canal will be the Central Belt destination and route of choice for relaxed leisure and easy tourism cycling, for day trips or weekend adventures and to access the Roman, industrial and natural heritage.

Policy alignment

The emerging Canal by Bike vision has clear links with KVF LEADER's Heritage, Tourism and Leisure theme. There are further strong synergies in Heritage, Tourism and Leisure, Sustainable Economic Development and Active Travel, as summarised in Table 1.

Table 1 – Partners' strategies with which Canal by Bike is aligned

Policy/ Strategy	National	Regional	Local
Heritage, Tourism and Leisure			
Tourism Scotland 2020 (2012 and 2016)	Scottish Tourism Alliance		
Visit Scotland: Tourism Development Framework to 2020 (2016)	Visit Scotland		
Historic Environment Strategy (2014)	Historic Environment Scotland		
People Make Heritage: Heritage Tourism 2020 Strategy	Scottish Tourism Alliance: Heritage Tourism Group		
Making the most of Scotland's Canals	Scottish Government		
Scottish Canals Heritage Strategy 20013-38	Scottish Canals		
Local Development Strategy 2014-2020		Kelvin Valley & Falkirk LEADER	
Tourism Falkirk 2020			Visit Falkirk
Tourism Lanarkshire 2020			Visit Lanarkshire
East Dunbartonshire Economic Development Strategy 2013-16			East Dunbartonshire Council
Sustainable Economic Development			
National Planning Framework	Scottish Government		
Central Scotland Green Network Vision		Central Scotland Green Network Trust/ SNH	
National Walking and Cycling Network		Scottish Natural Heritage	
Active Travel			
Cycling Action Plan for Scotland 2017	Transport Scotland		
East Dunbartonshire Active Travel Strategy 2015-2020			East Dunbartonshire Council



This demonstrates the breadth of partnerships and funding opportunities that could be developed.

User Requirements

Surveys of cyclists and other Canal users were undertaken to understand their needs. It was demonstrated that there is strong demand for day and multi-day trips, with the following interventions required:

- Better physical connections to and from the Canal to permit independent cycle trips;
- More cycle-friendly and family-friendly destinations and services to enhance the experience;
- Signing improvements and a website and mobile app to aid navigation and planning;
- A range of flexible and inexpensive accommodation and related services to permit overnight trips;
- Certainty of return rail travel, particularly for large groups.

Further to this, partners and communities identified the following opportunities:

- More accessible and flexible bike hire;
- Flexible, moveable facilities such as barge cafes, accommodation and bike services;
- Connectivity between all vested community groups and businesses the services they provide; and
- A printed and branded promotional map; and
- Promotion of all active modes jointly - paddle boarding, Segway, cycling, canoeing, walking etc.

A branded, co-ordinated offer is essential to tap into the potential effectively.

SWOT Analysis

The research identified clear strengths, weaknesses, opportunities and threats for the Forth & Clyde Canal as a cycle tourism product. A high level summary is provided in Figure 2.



Table 2 SWOT Analysis Summary

<p>Strengths</p> <ul style="list-style-type: none"> • Tranquility – rural experience • Relaxing and easy – the canal network is predominantly flat, suitable for all abilities (children, young, old disabled to cycle on) • Enticing natural and cultural heritage <ul style="list-style-type: none"> ○ ‘Frontier of the Roman Empire’ World Heritage site Antonine Wall ○ Access to nature – antidote to towns ○ Strong local & industrial heritage identities to build on – Clydebank/ Falkirk, North Glasgow, Kirkintilloch, Kilsyth, Falkirk, Grangemouth • Rail connections • Regional connections: John Muir Way, National Cycle Route 754 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Towpath capacity limits the potential for growth at some locations • ‘featureless’ sections of Canal – can it compete? • Unattractive or unsafe community connections • Incoherent directional signing • Lack of Canal Businesses co-ordination and shared goals • Lack of bespoke services aimed at cycle visitors • Canal towpath to Edinburgh splits from Carron Valley to Kelpies.
<p>Opportunities</p> <ul style="list-style-type: none"> • Local catchment: 40% of Scottish population • Strong public sector partners – in particular Scottish Canals, Sustrans, Visit Scotland, Scottish Natural Heritage, Tourism DMOs (particularly Falkirk) • Strong new destinations: Bowling Harbour, Auchinstarry Marina, Falkirk Wheel (400k visits pa), Kelpies (350k visits pa) and The Helix • Extension routes to Bowling; Glasgow, Edinburgh, Loch Lomond, NCN7, 75, 78, 1, 76, Eurovelo 1 & 12 • Range of infrastructure and tourism promotion funding • Local development projects, including Auchinstarry Marina, Bowling Harbour, Falkirk Active Travel Hub and THI, Extension of NCN76 to link the Kelpies, Kirkintilloch Town Centre Masterplan 	<p>Threats</p> <ul style="list-style-type: none"> • Lack of awareness of economic benefit, particularly amongst businesses • Rural development funding threatened by Brexit. • Perception of ‘cyclists’ as a nuisance – opposition/ competition for space, particularly at towpath constraints, with John Muir Way walkers and fishing • The level of buy-in from Edinburgh and Glasgow stakeholders is not known



Target Markets

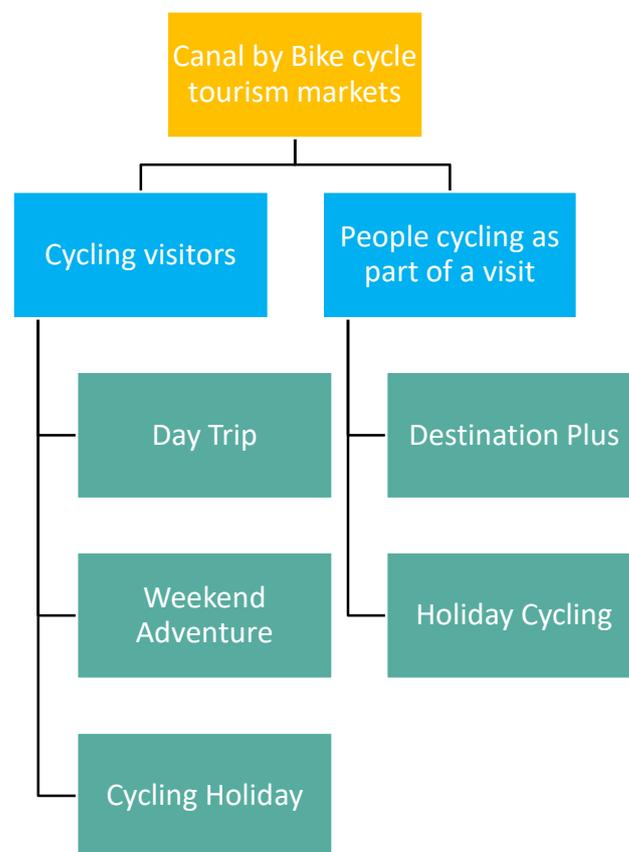
Cycle tourism is: “non-competitive, non-utilitarian leisure cycling, i.e. cycle tourism based on quiet roads and traffic-free paths.”¹

The Canal by Bike cycle tourism markets are identified as:

- Cycling visitors - people for whom cycling is the main purpose of the visit; and
- People cycling as part of a visit – people who may choose to cycle as part of a destination or holiday visit.

The linkages between the Canal by Bike target markets (blue boxes) and potential experiences (green boxes) were developed and are illustrated in Figure 2:

Figure 2 Canal by Bike Cycle Tourism Target markets and products



Potential for Growth

Sustrans RUIS Report², found that 925,000 trips were made per annum on the Canal close to the Falkirk Wheel, a 9% increase between 2011 and 2015. However the number of trips by

¹ The Value of Cycle Tourism, Transform Scotland (2013:11)

² NCN Route User Intercept Surveys, October 2015

bike did not grow over the same period. This is despite a 24% annual increase in cycle tourism spend in two years across the Scottish National Cycle Network as a whole³ and suggests that demand and opportunity is suppressed by:

- Poor cycling accesses from local communities and public transport;
- Lack of opportunity at destinations; and
- Lack of co-ordination and brand recognition between services and businesses.

Based on the data collected, case study and policy reviews and the engagement work, the ease of reaching different cycling target markets it illustrated in Table 3.

Table 3 - Ease of reaching key target markets

Cycle tourist type	Product	Local (Central belt catchment)	Wider domestic (Scottish)	International (incl rest of UK)
Cycle visitors	Cycle day trips	Easy	Moderate	Hard
	Weekend adventure	Easy	Moderate	Hard
	Cycling holidays	Moderate	Hard	Hard
Cycling as part of a visit	Destination Plus	Easy	Easy	Moderate
	Holiday cycling	Easy	Moderate	Hard

The greatest potential for cycle tourism growth is with existing Canal users and Central Belt originators. The easy to reach markets are those that should be prioritised demonstrate short term project impact to partners and businesses.

Interventions required

In response to user requirements and aligned with best practice, it is recommended that the following interventions are implemented.

Facilities

- Cycling opportunities like bike hire at major destinations that act as drivers of growth;
- Access infrastructure to increase the catchment of the towpath; and
- Mini-destinations and facilities that add value to the experience.

Marketing and Promotion

Targeted promotion based on improved market intelligence:

³ Sustrans (2015) Third Annual Report

<http://www.sustrans.org.uk/sites/default/files/images/files/Scotland%20annual%20report%202015.pdf>



- Develop a marketing strategy and brand identity;
- Communicate the market intelligence and potential to stakeholders and businesses; and
- Develop phased promotional content and delivery, including digital, targeted at the highest potential growth markets.

Governance

The study findings recommend establishing:

- A dedicated, full-time project co-ordinator;
- A strategic steering group of delivery bodies, possibly comprising Scottish Canals, and Local Area Tourism Partnerships, Sustrans, Visit Scotland, SNH and CSGNT; and
- Early business engagement through the Area Tourism Partnerships and focussed on demonstration of business benefits.

Cost Estimate

High level indicative costs have been prepared to identify the scale of the project. These are summarised (excluding VAT) as:

- Capital cost of £1.6m
- Year One revenue cost of £190,000
- Annual revenue cost of £120,000

These costs have been developed in the broadest terms. There will be opportunities to deliver much of the project within the current work of the partners. For example, Scottish Canals already runs an excellent user-facing website and is delivering a Towpath Strategy. Synergies with partners need to be explored in greater depth. However in order to develop high level costs, these potential synergies have not been considered. Table 4 presents the cost breakdown in further detail.



Table 4 – Indicative Canal by Bike cost estimate (excl VAT)

RECOMMENDATION	CAPITAL *	Y1 REVENUE	ANNUAL REVENUE
Rest – areas	£ 98,055		
Rest - seating	£ 130,137		
Information - Interpretive	£ 188,760		
Information – signposts (directional)	£ 23,064		
Shelter	£ 121,470		
Toilets	£ -		
Bike Storage	£ 112,464		
Secure baggage storage	£ 26,070		
Mini-destinations	£ 183,955		
Flexible, seasonal business locations	£ 54,360		
Attractive access routes	£ 624,000		
Cycle Hire	£ 24,000		
Luggage transfer and cycle rescue	£ 12,000		
Governance		£ 71,739	£ 71,739
Marketing Strategy - development		£ 50,000	£ -
Marketing Strategy - delivery		£ 60,000	£ 42,000
TOTAL PROJECT COST	£1,598,336	£ 181,739	£ 113,739
COST ROUNDED UP (NEAREST 1,000)	£ 1,600,000	£ 190,000	£ 120,000

* Capital cost estimates include a mid-range Optimism Bias rate of 20% to account for the difficulty of estimating infrastructure costs at Feasibility stage.

Recommendations and Next Steps

The potential for cycle tourism on the Forth & Clyde Canal is strong, but it is suppressed by a lack of opportunity and a lack of co-ordination. Canal by Bike can act as a driver for cycle tourism growth and it is recommended that KVF LEADER progresses the following steps with strategic stakeholders:

- Appoint a dedicated, full-time co-ordinator to get the project running successfully;
- Establish a strategic steering group of delivery bodies, possibly comprising Scottish Canals, Sustrans, Visit Scotland, SNH and Local Area Tourism Partnerships;
- Deliver a marketing strategy to provide clear market intelligence; and
- Prioritise the proposed interventions to deliver quick wins for businesses, with a longer deliver plan in mind
- Develop an evaluation approach that fills the current data gaps and demonstrates delivery for Tourism, Heritage and Active Travel policy partners in particular.

Above all, the project group should be focussed and deliver in phases. Targets for strong growth areas should be developed and activity should remain aligned with the marketing strategy. It is important to take a strategic approach by engaging communities and businesses to deliver.

