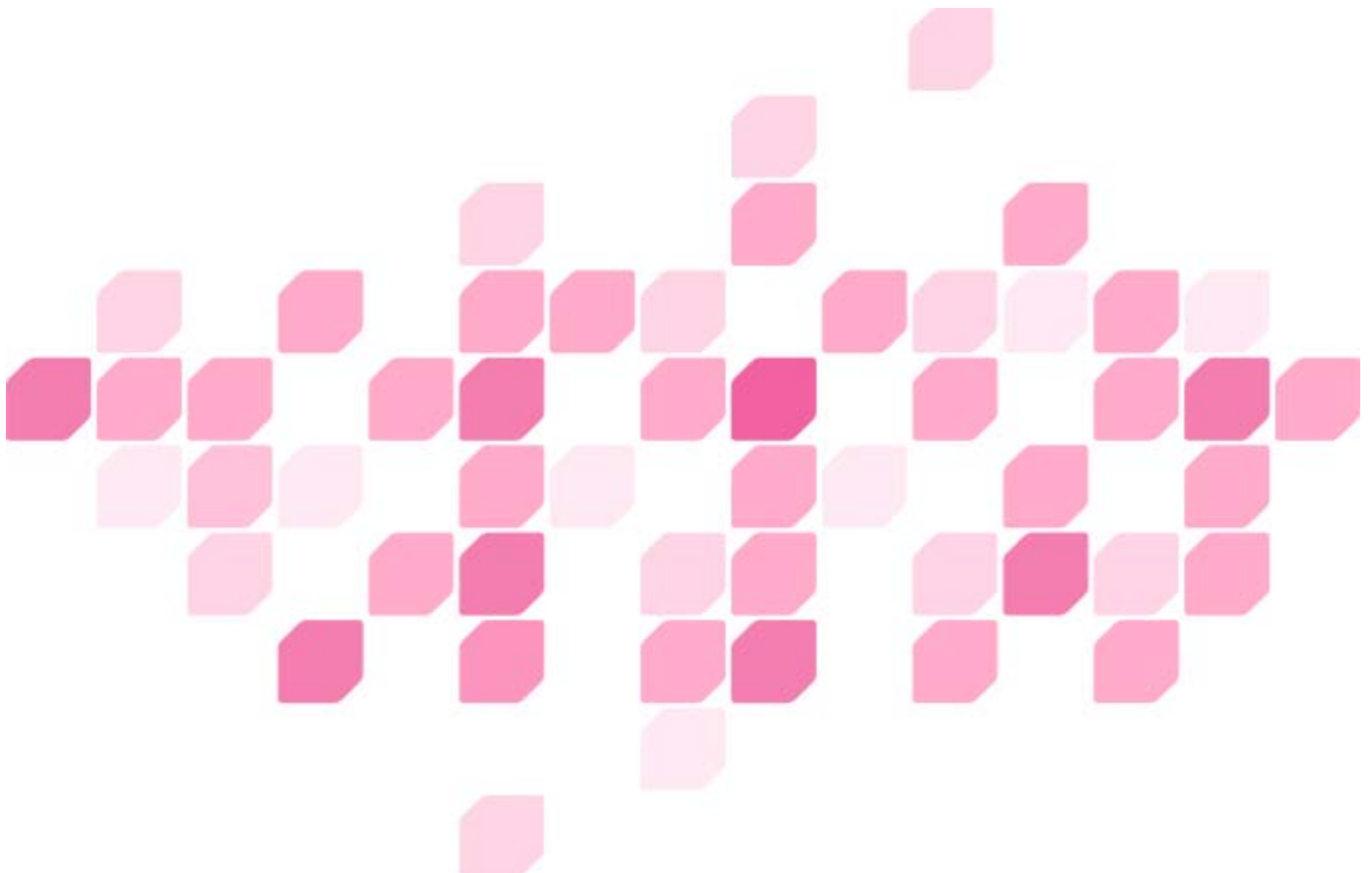




Fife Coast and Countryside Trust
Usage and Impact Study – Fife Coastal Path
Final Report

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1. Executive Summary

A usage and economic impact study of the Fife Coastal Path was undertaken from July 2006 to June 2007. Results are based on 667 personal interviews and counts at 18 locations along the path, together with 104 self-completion questionnaires, 3 focus groups, 1,000 interviews through the *Scottish Opinion Survey*, an e-mail survey of 600 businesses and a business workshop.

An estimated 480,000 to 580,000 visits were made over a twelve month period by a wide variety of users for many different types of activities. Annual net expenditure was estimated at between £24 million to £29 million. The path supports an estimated 800 to 900 FTE jobs in Fife.

52% of users were on a short trip from home, 20% were on a day out from home, and 26% were on holiday. 81% of all respondents had previously visited, with 46% visiting at least weekly in summer and 38% this frequently in winter. 54% of users were from Fife, 31% from elsewhere in Scotland, 9% from elsewhere in the UK and 4% from overseas. Of those on holiday, 55% lived in Scotland, 32% elsewhere in the UK and 13% from overseas. Almost half of the users were aged 55 or over, many of them classified as "Empty Nesters" (55 or over, no children at home). 67% of users were classified as employed in professional, managerial and non-manual occupations.

57% of respondents had a general knowledge of the path, 17% knew from friends and relatives, 9% noticed in passing, 4% from signposts, 3% from the internet, and 3% from the Tourist Information Centre. 28% of respondents rated the path better than other long distance walks, due to the diversity of scenery, grades of walks, and access to the coast, with 55% rating it the same. Two thirds of respondents were very likely to visit again, with only 3% unlikely to do so. The local focus groups favoured the scenery, peace and quiet, easy access, lack of commercialisation, wildlife, heritage and safety from traffic. Suggestions for improvements to the path included better signposting, fencing near cliffs, measures to control litter and dog waste, surface improvements, short (circular) walks, and greater access for pushchairs and wheelchairs. New facilities requested included more seats (11%); more dog bins (9%); more toilets (9%); more catering outlets (7%) and more information and interpretation (7%).

The Scottish Opinion Survey found that 9% of Scottish adults had visited the path – compared with the West Highland Way (9%), the Great Glen Way (4%) and Southern Upland Way (2%). 10% of respondents indicated that they were “very likely” to visit the path within the next year, with 23% “quite likely” to do so. Potential visitors would benefit from more information about the path (13%), about Fife in general (11%), and about access for pushchairs and wheelchairs (11%).

The path is highly valued by local businesses with 89% considering that it has a positive effect. Although the majority do not depend primarily on the path, it is one source of custom. 60% of businesses saw the business potential of the path either for themselves or other operators e.g. the hospitality industry and services for walkers.

2. Acknowledgements

As the survey contractors we are grateful for the assistance of all of those who contributed to this project including members of the survey consortium which included representatives of Fife Coast and Countryside Trust, VisitScotland, Fife Council and Scottish Enterprise Fife.

Thanks also to the 771 path users and 73 local businesses who agreed to take part in the survey and the individuals who attended the focus group discussions.

TNS Travel and Tourism

3. Synopsis

Background and introduction

In June 2006, Fife Coast and Countryside Trust (FCCT) commissioned TNS Travel and Tourism and SQW to conduct a study to measure the volume and characteristics of path users and the economic benefits the path brings to the area. The study was supported by a consortium which included FCCT, VisitScotland, Fife Council and Scottish Enterprise Fife and involved six elements - a survey of 771 path users, the manual counting of path users, focus groups with locals, a survey of the Scottish population, a survey of local businesses and an analysis of the economic benefits of the path.

Volume and value of path use

- It is estimated that between 480,000 and 580,000 visits were made to the Fife Coastal Path between July 2005 and June 2006. This is a higher number of annual visits than reported by some of the main visitor attractions in Fife¹ including Deep Sea World (270,000 visits), Abbot House (93,000 visits) and St Andrew's Castle (64,000 visits).
- In other parts of Scotland, outdoor recreation sites reporting a similar number of annual visits included Mugdock Country Park (540,000 visits), Pentland Hills Regional Park (515,000 visits) and Beecraigs Country Park (436,000 visits).
- Taking accounting of displacement and additionality, annual net expenditure associated with the Fife Coastal Path is estimated to be between £24 million (low case) and £29 million (high case).
- On the basis of this estimated net expenditure, a series of multipliers have been applied to account for the wider knock-on effects to the economy. On this basis it is estimated that the Fife Coastal Path supports between 800 and 900 Full Time Equivalent (FTE) jobs in Fife.

¹ VisitScotland, Visitor Attractions Monitor 2006

Profile of path users

- Just over half of path users (52%) were on a short trip from home of less than three hours in duration, a further one-fifth (20%) were on a longer day out from home and 26% were on a holiday or short break.
- The vast majority of respondents had been to the path before (81%). Some 46% of these respondents used the path at least once a week during the summer months (April to September) while 38% visited this often during the winter months (October to March).
- 54% of respondents were residents of Fife, 31% lived elsewhere in Scotland, 9% lived elsewhere in the UK and 4% were from overseas.
- While 45% of path users were aged 55 or over a much smaller proportion were aged 16 to 34 (16%). Reflecting this variation, 44% of users were classified as Empty Nesters (aged 55+, no children at home), 19% were in the Family lifestage (children in household) and 13% were Young Independents (under 35, no children).
- Reflecting their higher levels of participation in outdoor recreation generally, the majority of path users were in the ABC1 social classes (67%), employed in professional, managerial and non-manual occupations.
- The majority of all respondents travelled to the path by car (61%) while around half as many walked there from home or their holiday accommodation (30%). Most respondents travelled a relatively short distance to the path from their home or holiday accommodation with 55% travelling 5 miles or less.
- Nearly two in five respondents spent an hour or less on the path on the day they were interviewed (38%) while 29% spent between 1 and 2 hours on the path.
- In total, nearly three in five respondents took part in walking without a dog (59%) whilst nearly one-third of users were walking with a dog (32%). A smaller proportion of respondents took part in bird watching (10%) while others took part in photography (7%) or cycling (6%).

- Overall 60% of path users spent anything during their visit to the path. The average spend per path user, including those who spent nothing was £26.

Use of path by visitors on a holiday or short break

- 26% of path users were on a holiday or short break. Of these visitors 55% lived in Scotland, 32% lived elsewhere in the UK and 13% were from overseas.
- 85% of tourists who used the path stayed overnight within a mile of the Fife coast, with an average duration of stay within this area of 5.7 nights.
- The types of accommodation used by those who stayed within a mile of the Fife coast included the homes of friends and relatives (18%), self-catering accommodation (18%), hotels (15%), rented or owned static/holiday caravans (15%) and touring caravans (9%).

Quality of experience and improvements

- Overall, most respondents rated the path positively compared to other long distance walks and routes they had used with 28% saying it was better, 55% stating that it was about the same and 9% stating that it was worse. The largest proportion of respondents thought that the path was better than others due to the views and scenery (13%). Other strengths mentioned included the beaches, ease of access and the towns and villages on the route.
- Respondents were asked what they particularly liked about the path. In total the sea was mentioned by nearly half of all the respondents (45%) while the 'beautiful scenery' was mentioned by approximately one in three (30%). Building on these findings, respondents in the local resident focus groups stated that their favourite aspects of the path were the scenery, peace and quiet, easy access, lack of commercialisation, the wildlife to be seen, heritage and safety away from traffic.
- Loyalty levels towards the path were high with over two-thirds of respondents (68%) indicating that they were 'very likely' to return and use the path. Only a small minority indicated that they were unlikely to return to the path (3%). However in the local resident focus group with non users of the path specific 'barriers' to future use include safety concerns (high cliffs and uneven walking

surfaces), a perception that long distances must be walked and issues regarding litter and dog mess.

- Respondents were also given the opportunity to suggest possible improvements to the path. While a number of improvements were mentioned, signposting, litter and improving the condition of the path surface were the only three aspects mentioned by more than 5% of respondents. Similar suggestions were made in the local resident focus groups with specific mentions of improved fencing near cliffs, more litter and dog bins and improvements to allow greater access to the path for pushchairs and wheelchairs.
- When asked to suggest new facilities they would like to see on the path, the provision of more seats was mentioned by over one in ten users (11%). Other frequently suggested facilities included the need for more dog bins (9%), more toilets (9%), more catering facilities (7%) and more information about the views and attractions on the path route (7%). In the local resident focus groups the idea of new café facilities on the path route was received positively and there was also some demand for more and improved toilet facilities.

Awareness and marketing of the path – path users

- Nearly three in five path users were aware that the path had a name (58%).
- The majority of respondents indicated that they knew of the route through their 'general knowledge' or that they had 'always known about the path' (57%). A smaller proportion found out about the path through 'advice from friends and relatives' (17%) while others noticed the path 'in passing' (9%), from 'signposting' (4%), via the 'internet/world wide web' (3%) or found out at the 'Tourist Information Centre' (3%). In the focus groups with local residents, although most respondents had been aware of the path for some time were familiar with the route, the FCCT leaflets were still seen as a useful source of information and many had purchased Hamish Brown's book *The Fife Coastal Path*.

Awareness and marketing of the path – potential users

- Building upon the information collected through the path user survey, respondents to the Scottish Opinion Survey (an omnibus survey of a representative sample of the Scottish adult population) were asked a series of

questions regarding the Fife Coastal Path. A total of 1,007 interviews were undertaken in February 2007. The main results were as follows.

- Around one in ten Scottish adults visited the Fife Coastal Path for leisure purposes in the twelve months prior to the survey (9%). This is similar to the proportion who had visited the West Highland Way (9%) but more than the proportions visiting the Great Glen Way (4%) or Southern Upland Way (2%).
- By comparison, 16% had visited the Falkirk Wheel during this period, 8% had visited Lomond Hills Regional Park and 5% had visited Pentland Hills Regional Park.
- Overall, 10% of respondents indicated that they were 'very' likely to visit the Fife Coastal Path within the next year, while a further 23% indicated that they were 'quite' likely to do so. Factors most likely to encourage respondents to visit in this time period included more information about the path (13%), information about Fife in general (11%) and access for pushchairs and wheelchairs (11%).

The business perspective and opportunities

- The study also assessed the views of local businesses based close to the path through an e-mail survey which went out to around 600 businesses and a business workshop. Some of the key results included the following.
- The path is clearly valued by local businesses who responded to the survey, a majority considered that it had a positive effect on their business (89%). When asked about the impact of any temporary closure of the path, a substantial minority (44%) of respondents thought that there would be a negative impact on sales. The majority of respondents are therefore not primarily dependent on the path for custom but draw on it as one source of custom.
- The majority of responding businesses (60%) foresaw potential business opportunities arising from the path, either for their own businesses or for other operators. The business opportunities identified varied from a basic increase in the consumption of hospitality services as walker numbers increased to more sophisticated servicing of this market segment – including products and services specifically aimed at walkers.

- Ideas for development can be divided into two areas: public initiatives, where action is best carried out by the public sector; and private initiatives, where action is best carried out by businesses, or a collection of businesses, themselves as described further below.

Public initiatives

- Information - a lack of information about the path was identified as a constraint (24% of respondents). Consideration should be given to making existing FCCT literature available to businesses through deliveries to business premises, providing for bulk pickups from Tourist Information Centres or other locations or posting literature to businesses at the start of the season.
- Signposting - another constraint to developing the business potential of the path was the signposting of facilities (14% of respondents). Signposting was suggested both for the entrances to villages – where it would give an indication of what visitors might find - and for those exiting villages where it would tell them where the next set of services might be found.
- Access - A number of businesses suggested making the path more usable along its length by cyclists, considering that this would open the path up to a new group of users. Furthermore, there was a desire for improved access at different points, particularly for wheelchairs and prams, where the path was suitable for their passage. There was also a desire from participants for the path to develop links with the core paths network in the path hinterland to give more scope for circular walks and routes leading to particular places of historic or natural interest that may lie a little way off the path proper.

Private initiatives

- Marketing – a large proportion of respondents did not currently link their business to the path or the benefits that it offered to visitors in their marketing communications. It would be relatively inexpensive for more businesses to incorporate information about the path in their own communications – partners could supply appropriate “bite-sized” information for this purpose.
- Also a number of businesses thought there was scope for the development of a local path website – in parallel with the path website – giving details of accommodation, food and drink and entertainment.

- Another suggestion was for accommodation businesses to develop “accommodation chains” partnering with other businesses a day’s walk apart to offer an accommodation package to long-distance walkers.
- New business offerings - .A minority of respondents were looking to expand their operations into new markets, some of which were, or could be path-related, such as wider product ranges targeted at walkers, short-breaks, and cycle and fitness-related tourism.
- There are already travel operators promoting the path as a long-distance walk. These businesses book accommodation along the path for their customers and there may be potential for more businesses (e.g. attractions or food and drink) to tie in with them.
- Other suggestions include developing promotions to encourage visitors to travel to different parts of the path. There is already a Fife Beaches Passport scheme in operation which encourages tourists to visit each of the five Blue Flag beaches in Fife, and private sector variations on this theme are possible.
- Walkers Welcome - There was some demand amongst businesses for a broader Walkers Welcome-type initiative for the path that would extend to a range of businesses, and give walkers the reassurance that a hotel, restaurant or café would welcome their trade and they would be assured of hospitality. Membership of the scheme could be illustrated through stickers or signage, as well as other media such as leaflets or on websites.
- It is possible that an initiative of this type could incorporate a scheme similar to Perth Council’s Comfort Scheme, which compensates business owners for members of the public using their toilet facilities. Toilet provision has been one of the issues highlighted in the user survey, and this scheme may represent a relatively low-cost solution compared with building and manning public toilets.
- A scheme such as this could be a low-cost yet highly visible way for businesses along the path to demonstrate their interest in the path as a source of customers and a willingness to meet their needs.

4. Introduction

4.1 Background

The Fife Coastal Path runs for over 80 miles from Culross to the Tay Bridge and proposals exist to extend it to Perth via Newburgh on the Fife/Perth & Kinross border, and from Kincardine on the Clackmannanshire border to Culross. As part of their programme to plan and develop the Fife Coastal Path, in June 2006, Fife Coast and Countryside Trust (FCCT) commissioned TNS Travel and Tourism and SQW to conduct a study to measure the volume and characteristics of path users and the economic benefits the path brings to the area. The study was supported by a consortium which included FCCT, VisitScotland, Fife Council and Scottish Enterprise Fife. The findings will form the basis of future business plans and development programmes aimed at assisting the management of the path and to encourage further use of the path.

During the course of the study and following the completion of survey fieldwork TNS and SQW undertook a number of presentations of results to various audiences including a presentation to members of the Fife tourism industry on 24th August 2007. Also the study findings contributed to the EU funded Interreg IIIB North Sea Trail Project and Interreg IIIC Destilink Project.

4.2 Survey Objectives

The specific study objectives were as follows:

- To obtain a profile of the users of the path;
- To establish where visitors to the coast stay during their visit and how long they stay;
- To ascertain what factor the path played in the visitor's destination decision process;
- To determine what improvements could be made to improve visitor experiences of the Fife Coast and Fife Coastal Path;
- To estimate the number of users of the Fife Coastal Path;
- To gain information about visitor's views of the Fife Coast, visitor facilities and resources;
- To establish levels of user satisfaction in relation to their experience of the Fife Coastal Path;

- Define the path user's awareness of marketing materials, brands/logos and other promotional materials such as the website and publications;
- To identify the economic benefits the path brings to the area.

4.3 Survey Methodology

The study involved the following six elements:

- A survey of path users.
- The manual counting of path users.
- Estimating the economic benefits of the path.
- Focus groups with locals.
- A survey of the Scottish population.
- A survey and consultations with local businesses.

The methods used in each of these elements are described in more detail below.

Survey of path users

The core methodology used for the survey of path users was a programme of face-to-face interviews with a random sample of users at a selection of sites along the path route. A total of 667 interviews were conducted during 56 days between July 2006 and June 2007. Interviews locations were spread across 18 coastal path sites which spanned from North Queensferry to Tay Bridge and included a combination of urban and rural locations. The interview locations are listed in the table below.

1	Aberdour, Silversands	10	Anstruther Golf Course
2	Burntisland	11	Lower Largo car park
3	Elie	12	Leven beach/ Levenmouth
4	St Andrews East Sands	13	Dysart
5	St Andrews West Sands*	14	Kirkcaldy-Seafield car park
6	St Andrews Harbour	15	North Queensferry/ Inverkeithing
7	Tentsmuir Forest car park/ beach	16	Culross
8	Kingsbarns car park	17	Pittenweem
9	Crail/ Fife Ness	18	Tay Bridge car park

In addition to the face-to-face interviews, a secondary form of data collection was used to boost the sample. Where respondents were unwilling or unable to stop for interview, such as long distance walkers or cyclists, self completion questionnaires were handed out by interviewers. Self completion questionnaires were also distributed to path users by Tourist Information Centres along the path for visitors to

complete and return. The questions included in the self-completion questionnaire were almost identical to the questions asked in the face-to-face questionnaire. Overall, 104 self completion questionnaires were returned, giving a total sample size of 771 respondents. With this total sample of 771 respondents, the data generated is accurate to +/- 3% at the 95% levels of confidence.

The face-to-face interviews were conducted with a random sample of visitors. Visitors were targeted on the basis of the next person to leave or pass the interviewer, on completion of the previous interview. This procedure maximised the number of interviews completed within an interviewer shift whilst maintaining the random selection of respondents. In circumstances where a group of people or a family were together, the “next birthday” rule was used to select one respondent per group or family for interview. All members of the group or family aged 16 years or over were eligible for selection, thus ensuring that the principles of random sampling were maintained.

The results of the user survey are contained in Section 5.1 of this report.

Manual counting of path users

In order to provide estimates of visitor numbers, interviewers also carried out manual counts of visitors during all 56 interviewing shifts, a combined period of over 330 hours. These counts took place at all 18 of the survey locations along the path route.

Interviewers counted the number of adults and children on foot, visitors on bikes, motorbikes and horses, as well as the number of dogs, prams and wheelchairs. Results of the analysis of manual count data and the resulting estimates of total path usage are contained in Section 5.2 of this report.

Economic benefits of the path

An important element of this study was an analysis of the economic impact of the path. The approach used followed the methodology developed by UK Sport for assessing the economic impact of recreational activity and was based upon data collected from the survey of path users and the estimates of annual visits obtained from the manual counting.

Results of the economic impact analysis are provided in Section 5.3 of this report.

Focus groups with locals

Three focus group discussions were also conducted with residents of Fife. The purpose of these group discussions was to establish a deeper understanding of visitor attitudes and opinions towards the path. Two groups were held with regular path users (one with dog walkers and one with walkers with no dog) and one group was held with non-users of the path.

The main results of the focus groups are contained in Section 5.4 of this report.

Survey of the Scottish population

A series of questions were included on the Scottish Opinion Survey, a consumer omnibus survey, to allow measurement of levels of awareness of the path amongst people who had not used it, levels of appeal and interest, and barriers to usage. Importantly, this stage also enabled the path to be compared against other competitor destinations in terms of both visits taken and awareness. Around 1,000 interviews were undertaken with a representative sample of Scottish adults.

The main results of the survey of the Scottish population are contained in Section 5.5 of the report.

Survey and consultation with local businesses

This element of the study involved an e-mail survey of businesses along the path route and a workshop with interested local businesses.

The e-mail survey went out to nearly 600 businesses and responses were provided by 73 (a response rate of around 13%). The invitation to participate in the workshop was passed to a similar number of businesses.

The main results of this stage are contained in Section 5.6 of this report.

5. Results

5.1 Survey of path users

This section of the report presents the main findings to emerge in the survey of path users, and is based on a sample of 771 completed interviews (667 face-to-face interviews and 104 self-completion questionnaires).

Throughout this section the results for all respondents are presented alongside those for the three key sub-groups:

- **Short Trips** – those on a trip away from home of less than three hours in duration.
- **Days Out** – those on a trip away from home of three hours or more in duration.
- **Staying Visitors** – those staying away from home on an overnight trip of at least one night or more.

In the following sections of the report results for the sample as a whole (Total column) and each of the above segments are presented separately.

Full cross-tabulations of the data are available under a separate cover.

Social Class

The majority of respondents were in the ABC1 social classes (67%)². It should be noted that in leisure surveys of this nature there is typically a bias towards these professional, managerial and non-manual occupations. Indeed the 2005 Scottish Recreation Survey, undertaken by Scottish Natural Heritage, recorded that 88% of Scottish adults in the AB social classes regularly took part in outdoor recreation in 2005 compared to only 59% of those in the DE classes (non-skilled manual occupations and unemployed).

Table 3-2 illustrates the variations in social class profile across the sub-groups:

Table 5-2– Social class profile by sub-group (%)
Base: All Respondents (N=771)

	Short Trip	Day Out	Staying Visitors	Total
AB	28	30	46	34
C1	34	37	28	33
C2	17	15	10	15
DE	19	17	13	17
Retired/no other mentions	1	-	1	1
Refused/not stated	1	-	1	1
Base:	398	155	204	771

- nil respondents

Staying visitors were more likely to fall into the AB social classes (46%) while the socio economic spread of those on a short trip was much broader.

² A definition of social classes is included in Appendix 1.

Lifecycle

One of the key features of modern tourism and leisure marketing is the segmentation of different types of visitors into groups with distinctive characteristics. Rather than talk about ABs or the Under 35s, by grouping respondents together by lifestyle characteristics, more meaningful and usable information can be obtained. In this context, the following lifecycle segments have been derived and are used throughout this report. The following is an indication of the proportion of the sample which fell into each category:

- Young Independents Aged under 35 years, no children in household **13%**
- Older Independents Aged 35-54, no children in household **23%**
- Families Any children in household **19%**
- Empty Nesters 55+, no children in household **44%**

Clearly the Fife Coastal Path appeals most to Empty Nesters with just under half of users falling in this category (44%). Just under a quarter (23%) fell into the Older Independent category whilst nearly one-fifth (19%) of respondents interviewed were Families. Reflecting the age profile of path users, just 13% fell into the Young Independents category.

Of particular interest is that the lifecycle profiles varied quite significantly dependent on interview location. The stretch of the path to the north of Fife Ness (the section which includes St. Andrews) attracted a far larger proportion of Young Independents comparative to other sections of the path. Just over a quarter (26%) fell into this category in this section compared to just 8% of those interviewed between Lower Largo and Fife Ness and 9% between North Queensferry and Leven Beach. Empty Nesters on the other hand were more likely to use the section of path between Lower Largo and Fife Ness than the section to the North. Just over half (52%) of those interviewed between Lower Largo and Fife Ness were Empty Nesters compared to 35% on the path near St. Andrews. A larger proportion of Families were more likely to use the section between North Queensferry and Leven Beach (23%) compared to the sections between Lower Largo to Fife Ness (16%) and St. Andrews (15%).

Party Size

The average party size amongst all respondents was 2.3 persons. The breakdown by size of party for each of the visitor profiles is illustrated in Table 3-3 below:

Table 5-3– Party Size (%)

Base: All Respondents (N=771)

	Short Trip	Day Out	Staying Visitors	Total
One	41	26	10	30
Two	39	45	56	44
Three	6	11	11	9
Four	6	11	11	8
Five or more	5	5	8	6
Don't know/not stated	4	3	3	4
MEAN – TOTAL PARTY	2.0	2.7	2.6	2.3
Base:	398	155	204	771

Nearly one-third (30%) of respondents were visiting the path on their own. Generally, respondents were most likely to be in a party size of two (44%).

Further analysis of the data reveals that those on a short trip were far more likely to be on their own (41%) whilst those on a day out and staying visitors were more likely to be in a party size of two people (45% and 56% respectively). Along the path as a whole, the following categories of visitors tended to be in larger than average party sizes:

- Females (2.5)
- Those aged 35-54 years (2.6)
- Families (3.4)
- Those on a day trip of more than three hours (2.7)
- Those staying away from home (2.6)
- Those who travelled more than 6 miles to the path (2.6)
- Those spending more than 2 hours on the path (2.7)
- Respondents accompanied by children (4.3)
- Respondents who lived outside of Fife (2.6)

Other party members

Amongst those respondents who were accompanied by at least one other person, the majority were with members of their family (72%). Path users who were on a day out were more likely than the other user types to be with friends (28%).

Table 5-4– Other Party Members (%)

Base: All those accompanied by at least one other person (N=448)

	Short Trip	Day Out	Staying Visitors	Total
Members of your family	71	60	80	72
Friends	22	28	13	20
Family and friends	6	9	7	7
A school group	1	-	-	*
An organised group	1	1	-	*
Someone else	-	2	1	1
Base:	189	101	152	448

- nil respondents

* - less than 0.5%

Whether accompanied by a dog

All respondents were asked if they had a dog with them on their visit or day out. Overall, nearly one-third (29%) had a dog with them. When analysed by trip type, those on a short trip were most likely to be accompanied by a dog (39%) compared to 18% of visitors on a day out and 16% of staying visitors.

Further analysis of the data reveals that half of Fife residents from the East Neuk area were accompanied by a dog (50%) when interviewed. Also, reflecting the popularity of the path with local dog walkers, half of those (50%) who indicated that they used the path 'at least once a week' were accompanied by a dog.

By comparison, the 2005 Scottish Recreation Survey, undertaken by Scottish Natural Heritage, recorded that dog were taken on 22% of all outdoor recreation visits (including both short trips and days out), a lower proportion than recorded on the Fife Coastal Path (29%).

Membership of local and national organisations

All respondents were asked if they were a member of a local or national walking, outdoor recreation, nature, conservation or history organisation.

Overall 28% of path users stated that they were members of one or more organisation with the National Trust (16%) and RSPB mentioned most frequently (6%). A detailed listing of all of the organisations cited is available in the full cross-tabulations of data (pages 331 to 333).

Origin of Respondents

Table 3-5 below provides a detailed breakdown of the origin of respondents.

Table 5-5– Origin of respondents (%)

Base: All Respondents (N=771)

	Short Trip	Day Out	Staying Visitors	Total
Fife	80	50	6	54
- West Fife	14	10	1	10
- Central Fife	9	12	*	7
- East Neuk	19	5	*	12
- North East Fife	13	11	1	9
Rest of Scotland	16	46	48	31
- Glasgow	1	4	10	4
- Edinburgh	3	9	4	4
- Dundee	4	8	-	4
Rest of Britain	1	2	32	9
Rest of World	*	-	13	4
<i>Base:</i>	<i>398</i>	<i>155</i>	<i>204</i>	<i>771</i>

- nil respondents

* - less than 0.5%

Just over half of respondents were residents of Fife (54%) with the largest proportions living within the East Neuk or West Fife. Not surprisingly, those on a short trip were most likely to be residents of Fife – 80% compared to 50% of those on a day out and just 6% of staying visitors. Amongst the staying visitors, just under half (48%) were from the rest of Scotland, 32% were from the rest of the UK and 13% were from overseas.

The section of path between North Queensferry and Leven Beach attracted a higher proportion of Fife residents than other sections (68%) while the section north of Fife Ness encompassing St. Andrews was more likely to be used by visitors from further afield.

There were also some further variations in the profiles of respondents amongst some key market segments:

- *Empty Nesters*: a larger proportion from Fife (59%)
- *Older Independents*: a larger proportion were from elsewhere in Scotland (36%)
- *Young Independents*: a slightly larger proportion were from overseas (7%)

Reflecting the variety of different users of the path, six of the respondents interviewed were from the USA, three from Australia, two from Canada and the sample also included respondents from China and Malaysia.

Type of Trip

Underlining that the large proportion of respondents that were residents of Fife, just over half (52%) were on a trip from home of less than three hours in duration. This proportion was largest amongst the following market segments:

- Residents of Fife (76%)
- Those spending less than half an hour on the path (68%)
- Respondents accompanied by a dog (71%)
- Respondents who use the path at least once a week (78%)

A further one-fifth (20%) of respondents were on a day out from home of more than three hours. This proportion was largest amongst the following market segments:

- Those in the Young Independents lifecycle (32%)
- Respondents who had travelled more than 21 miles to get to the path (41%)
- Those spending more than two hours on the path (38%)

Just over a quarter (26%) were staying away from home. This proportion was above average amongst the following market segments:

- Non-residents of Fife (94%)
- First time visitors to the path (60%)

The purpose of the trip profile varied between the path locations. Visitors to the section of path between North Queensferry and Leven Beach were more likely than average to be on a short trip of less than three hours from home (60%). Staying

visitors were more likely than average to be visiting the stretch of path between Lower Largo and Fife Ness (36%).

Length of stay

The 26% of respondents who were staying away from home (N=204) were asked to indicate how long they were staying away from home. As the table below illustrates, the average number of nights spent away from home in total was 7.3 with 39% of users on a short trip of 1 to 3 nights while 58% were on a longer holiday.

85% of these visitors stayed overnight within a mile of the Fife coast, with an average duration of stay within this area of 5.7 nights. Smaller proportions stayed in other places during their holiday – 25% within the rest of Fife (av.6.0 nights) and 33% elsewhere in Scotland (av. 6.2 nights).

Table 5-6 – Length of stay away from home (%)

Base: All respondents staying at least one night away from home (N=204)

	Within 1 mile of the Fife coast	Within the rest of Fife	Within rest of Scotland	Away from home
None	15	75	67	-
1 night	8	2	2	7
2 nights	19	2	2	19
3 nights	14	3	3	13
4 to 6 nights	14	2	7	16
7 to 14 nights	25	2	4	32
14+ nights	3	*	1	9
Don't know/not stated	3	12	12	3
AVERAGE	5.7	6.0	6.2	7.3
LENGTH OF STAY IN NIGHTS				
<i>Base</i>	<i>204</i>	<i>204</i>	<i>204</i>	<i>204</i>

- nil respondents

* - less than 0.5%

Accommodation used

Those 191 respondents (25% of the total sample) who were spending at least one night in Fife were asked what type of accommodation they had already used or intended to use during their visit.

Table 5-7 – Type of accommodation used in Fife (%)
Base: All respondents spending at least one night in Fife (N=191)

	Staying visitors
Self-catering flat/house/cottage	18
Staying with friends/relatives	18
Hotel/motel	15
Bed and breakfast	12
Touring caravan/motorhome	9
Holiday/static caravan – owned	8
Holiday/static caravan – rented	7
Second home	5
Guest House	4
Tent	2
Time share	1
Hostel/bunkhouse/both	1
University accommodation	-
Other	3
None of these	-
<i>Base</i>	<i>191</i>
- nil respondents	

Clearly, the VFR (visiting, friends and relatives) market is important to Fife with nearly one-fifth (18%) of visiting path users staying with friends and relatives during their stay Fife. Self-catering accommodation was also important amongst respondents with 18% staying in this type of accommodation. The next most popular types of accommodation were hotels (15%) and rented or owned static/holiday caravans (15%). About a tenth of respondents (9%) were staying in a touring caravan/motorhome.

Previous visits

The vast majority of respondents were on a repeat visit (81%) with visitors using the section between North Queensferry and Level Beach were most likely to be on a repeat visit (87%). Other types of respondent more likely to be on a repeat visit included:

- Those over 55 years of age (87%)
- Empty Nesters (87%)
- Those accompanied by a dog (93%)

Those respondents who were on a repeat visit to the path were asked to specify the number of times they normally visited the path during the summer months (April to September) and winter months from October to March.

Table 5-9– Frequency of visits to path in the summer/winter months (%)
Base: All those who have used the path before (N=577)

	Summer	Winter
More than once per day	3	2
Every day	17	13
Several times a week	16	13
Once a week	10	10
Once or twice a month	21	16
Once every 2-3 months	10	7
Once or twice	20	20
Other	1	1
Never	1	18
Base:	577	577

* - less than 0.5%

Some 46% of these respondents used the path at least once a week during the summer months compared to 38% during the winter months. 18% claimed to never use the path during the winter months compared to just 1% during the summer.

Reasons for using path

Respondents were asked how important the path was in their decision to visit the place where they were interviewed. If the respondent answered that it was one of several reasons for visiting or of no importance then they were subsequently asked to give more details on their other reasons for visiting.

Table 5-10– Importance of Fife Coastal Path in decision to make a trip (%)
Base: All Respondents (N=771)

	Short Trip	Day Out	Staying Visitors	Total
My sole reason for coming	48	49	23	42
My main reason for coming	21	19	17	19
One of several reasons for coming	14	13	31	19
Of no importance	16	19	28	20
Don't know/not stated	1	-	1	1
<i>Base:</i>	<i>398</i>	<i>155</i>	<i>204</i>	<i>771</i>

- nil respondents

Clearly, for the majority of those on a short trip or a day out, the path was the sole or main reason for their trip (69% and 68% respectively). For staying visitors, the responses were more varied with a larger proportion stating that the path was one of several reasons for coming (31%) or of no importance (28%).

Table 5-11– Reason for visiting the area (%)

Base: Respondents who had one of several reasons for visiting the area or the path was of no importance (N=302)

	Short Trip	Day Out	Staying Visitors	Total
Visit other attractions	9	29	30	21
Visiting friends or family	7	10	11	9
Just for a day out	11	10	7	9
Out for a walk/cycle	13	10	2	9
Holiday/Short Break	1	6	17	8
To visit the beach	10	8	5	8
To walk the dog	8	-	3	5
Shopping	4	2	3	4
Just passing through	7	6	-	4
Like the area/like Fife	2	4	2	3
Working	5	2	1	3
Playing golf/football etc	2	4	2	2
Never been before	-	-	2	1
Been before	2	-	1	1
Scenery/coastline	2	-	1	1
Other	12	8	5	8
Don't know/not stated	10	6	11	10
<i>Base:</i>	<i>121</i>	<i>49</i>	<i>123</i>	<i>302</i>

- nil respondents

As the table above illustrates, one of the most frequently provided other reasons for visiting the area was to visit other attractions within the area (21% overall). For those on a short trip, the main reason given was that they were on the path as part of a wider walk or cycle ride within the area (13%).

How found out about the path

Reflecting the high level of use of the path amongst local residents and the high level of repeat visits, the majority of respondents indicated that they first found out about the route through their 'general knowledge' or that they had 'always known about the path' (57%). This response was more frequently provide by the following groups:

- Those aged 55+ years (66%)
- Empty Nesters (67%)
- Those on a short trip away from home (71%)
- Respondents travelling 5 miles or less to reach the path (66%)
- Fife residents (77%)

Nearly one in five respondents were influenced by 'advice from friends and relatives' (17%). This information source was of particular importance amongst the following groups:

- Those aged under 35 (28%)
- Young Independents (28%)
- Those staying away from home (30%)
- Respondents travelling between 6 – 20 miles (25%)

A smaller proportion of respondents mentioned that they noticed the path 'in passing' (9%), from 'signposting' (4%), via the 'internet/world wide web' (3%) and the 'Tourist Information Centre' (3%).

Influences in decision to visit

To identify the key strengths of the area, respondents were presented with a list of features of Fife and asked to indicate which, if any, were particularly important influences in their decision to visit the area.

Table 5-13– Which features of Fife influenced your decision (%)

Base: All respondents (N=771)

	Short Trip	Day Out	Staying Visitors	Total
N/A Live in Fife	69	35	4	45
The coastal paths	14	35	47	27
The beaches	15	29	46	26
The towns and villages	11	15	55	23
Woodland areas	6	15	11	9
Nature reserves/wildlife centres	6	8	10	7
Golf courses	2	1	13	5
Cycle routes	3	5	5	4
Base:	398	155	204	771

Clearly the coastal path and beaches were key strengths with each mentioned by approximately a quarter of all respondents (27% and 26% respectively). Amongst staying visitors, over half mentioned the towns and villages along the path as the main influence (55%), while a slightly smaller proportion of these visitors mentioned the coastal path and beaches (47% and 46% respectively). The golf courses within Fife were also an attraction for around an eighth of staying visitors who were using the path (13%).

Awareness of path name

Nearly three in five respondents were aware that the path had name (58%).

Awareness levels were highest amongst the following groups:

- Those aged 55+ years (69%)
- Residents of West Fife (70%)
- Those interviewed on the section between Lower Largo and Fife Ness (69%)
- Empty Nesters (69%)
- Those using the path for more than two hours (66%)

Those respondents who indicated they were aware that the path had a name were then asked to specify the name of the path.

Table 5-14– Awareness of Name of Path (%)

Base: Those respondents who were aware of name (N=448)

	% respondents
Fife Coastal Path	68
Coastal Path	13
Fife Coastal Walk	2
Seafield Path	1
Fife Coastal	1
Fife Coastal Park	1
Fife Coastal Route	1
Kingkell Braes	1
Other	12
Base:	448

As shown above, the majority of respondents were aware they were on the Fife Coastal Path (68%) but others provided similar variations on the 'correct' name.

By comparison in the 2004/2005 survey of path users undertaken by FCCT, 37% of respondents recognised the Fife Coastal Path logo.

Awareness of other long distance paths

Nearly two-thirds of respondents had heard of any other long distance walks or paths (63%). These respondents (n=422) were then asked to specify the name(s) of the walks or paths they knew of.

Table 5-15– Names of walks or paths aware of (%)
Base: Those respondents who were aware of name (N=422)

	% respondents
West Highland Way	71
Pennine Way	21
Southern Uplands Way	18
Great Glen	6
Hadrian's Wall	6
Coast to Coast	4
Speyside Way	4
Offas Dyke	3
St. Cuthberts	3
South West Coastal Path	2
Cornish Coastal Path	2
Lairig Grhu	2
Base:	422

The most frequently mentioned route by far was the West Highland Way (71%) while smaller but significant proportions were aware of the Pennine Way (21%) and Southern Uplands Way (18%).

Use of other long distance paths

Those respondents who were aware of other walks or paths in the UK were then 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). Those more likely to have used other walks or paths included staying visitors (74%), those who had travelled more than 20 miles to reach the path (71%) and those who were using the path for more than two hours (71%). This would seem to suggest that the path attracts a certain group of visitors who are keen walkers and have experience of other long distance routes.

Those respondents who indicated they had used other paths (n=332) were then asked to specify the name of those they had used.

Table 5-16– Names of other walks or paths used (%)

Base: Those respondents who have used other walks or paths (N=322)

	% respondents
West Highland Way	33
Pennine Way	7
Southern Upland Way	4
Hadrian's Wall	2
Coast to Coast	2
Speyside Way	2
St. Cuthberts	2
Lairig Grhu	2
Cleveland Way	2
Base:	332

Evidently, the West Highland Way is the walk that the largest proportion of respondents had either heard of or had used. Smaller proportions were aware of or had used the Pennine Way or the Southern Upland Way.

Rating of the path compared to others

Respondents who has used other paths were asked to rate how the Fife Coastal Path compared with the other routes they had experienced.

Table 5-17– Rating of path compared to other walks (%)
Base: Those respondents who have used other walks or paths (N=332)

	Short Trip	Day Out	Staying Visitors	Total
Better than other walks	31	28	25	28
Worse than other walks	12	6	3	7
About the same as other walks	50	61	57	55
Don't know/not stated	7	6	15	9
Base:	137	69	115	332

Overall, respondents rated the path positively compared to other walks with 83% saying it was about the same or better but 9% stating that it was worse. Notably, a higher proportion of those who used the path at least once a week rated it better than other walks (37%).

Those respondents who rated the path better or worse than other long distance walks or paths were asked to expand on the reasons for their answer. The results are illustrated below.

Table 5-18– Reasons for rating the path better than other walks or paths (%)
Base: Those respondents who rated the path better than other long distance walks or paths (N=89)

	% respondents
Views / scenery	13
Quality of paths	9
Beaches	5
Convenience / ease of access	4
Local towns and villages	3
Clear signposting	2
Local tourist attractions / historical sites	2
Local amenities / facilities	2
Clean / well maintained	2
Base:	89

The largest proportion of respondents thought that the path was better than others due to the views and scenery (13%) while nearly one in ten, mentioned the quality of the paths (9%). Other strengths of the path over others included the beaches, ease of access and the towns and villages on the route.

Of the small number of respondents who rated the path worse than similar walks and paths (n=23), 9 respondents (3%) mentioned the quality of the path surface and 3 respondents (1%) mentioned litter and dog mess and that the path 'needed tidying up, overgrown in some places and untidy'.

Distance travelled

All respondents were asked how far they had travelled (one way) to the path either from their home or holiday accommodation. The results are illustrated in Table 3-19 below.

Table 5-19– Distance Travelled to Path – One Way (%)

Base: All respondents (771)

	Short Trip	Day Out	Staying Visitors	Total
Less than 2 miles	39	13	41	35
2-5 miles	25	12	20	20
6-10 miles	16	15	17	16
11-20 miles	6	22	8	10
21-30 miles	6	9	4	6
31-40 miles	3	10	1	4
41-50 miles	1	8	3	3
51-60 miles	1	3	1	1
61-80 miles	1	4	2	2
81-100 miles	*	2	1	1
More than 100 miles	*	1	1	1
Don't know/not stated	-	1	*	*
Base:	398	155	204	771

- nil respondents

* - less than 0.5%

Evidently, the majority of respondents travelled a relatively short distance to the path with over half travelling 5 miles or less (55%). A further 16% had travelled between 6-10 miles.

Further analysis of the data reveals that the following groups were more likely to travel 5 miles or less:

- Those on a short trip from home (64%)
- Those spending less than 30 minutes on the path (70%)
- Residents of Fife (67%)
- Respondents accompanied by a dog (70%)

In contrast, the following user groups were more likely to travel at least 20 miles to the path (18% overall):

- Those aged 35-54 years of age (25%)
- Those on a day trip of more than 3 hours in length (37%)
- Residents of Scotland from outwith Fife (37%)
- Those who use the path less than once or twice a month (30%)
- Those using the path for more than 2 hours (29%)

Respondents were asked where they had travelled from that particular day. As shown below, the St. Andrews area was the most frequently mentioned location (14%), especially amongst staying visitors (26%). Of those on a day out, one in ten (10%) respondents had travelled from Edinburgh and around half has travelled from towns and cities outwith Fife (47%).

Table 5-20– Where travelled from – town or nearest town (%)
Base: All respondents (771)

	Short Trip	Day Out	Staying Visitors	Total
St. Andrews	11	6	26	14
Kirkcaldy	11	11	2	8
Anstruther	6	-	11	7
Pittenweem	5	1	9	6
Edinburgh	2	10	5	5
Burntisland	5	2	1	4
Dundee	4	9	*	4
Dunfermline	5	3	-	3
Crail	4	1	4	3
St. Monans	1	1	4	2
Dalgety Bay	2	3	1	2
Glenrothes	1	3	1	2
Elie	2	1	4	2
Kinghorn	2	2	1	2
<i>Total towns outside Fife</i>	18	47	18	24
<i>Total towns inside Fife</i>	82	53	82	76
<i>Base:</i>	398	155	204	771

- nil respondents

* - less than 0.5%

Transport used

All respondents were then asked to indicate which type of transport they had used to travel to the path.

Table 5-21– Transport used to get to the path (%)
Base: All respondents (771)

	Short Trip	Day Out	Staying Visitors	Total
Car/van	63	69	52	61
Walked	31	14	40	30
Bicycle/Mountain Bike	5	5	2	4
Private minibus/coach	*	2	-	1
Public bus	1	6	3	2
Train	-	3	1	1
Other	-	1	3	1
Base:	398	155	204	771

- nil respondents

* - less than 0.5%

The majority of all respondents travelled by car (61%) while around half as many walked to the path (30%). The proportion walking to the path was highest amongst staying visitors while those on a day out were more likely to drive.

One area of note from the findings is the relatively small number of respondents who used public transport to travel to the path (3% overall). The path has an advantage over many similar walks and paths in that it has what is recognised as a good train and bus service running the length of the path. The fact that so few respondents used public transport to travel to the path would suggest this as a potential marketing opportunity.

These findings are mirrored by the results from the 2004/2005 path user survey undertaken by FCCT. In this survey some 71% of users travelled to the path using private transport, a quarter (24%) walked to the path and just 4% used public transport.

It is also interesting to compare these results with those of the Scottish Recreation Survey – a major survey regarding outdoor recreation which is undertaken by Scottish Natural Heritage. The results of this study suggest that in 2005, 56% of all outdoor recreation trips (including both short trips and days out) taken by Scottish adults were taken by car, 35% were taken on foot, 4% were taken by bicycle and 3% used public transport.

Length of time spent on path

Nearly two in five respondents spent an hour or less on the path (38%) while 29% spent between 1 and 2 hours on the path (29%).

Table 5-22– Length of Time Spent/Intend to Spend at Site (%)

Base: All respondents using the coastal path (711)

	Short Trip	Day Out	Staying Visitors	Total
Up to 15 minutes	3	1	2	2
Over 15 minutes – 30 minutes	16	5	7	12
Over 30 minutes – 1 hour	30	12	24	24
Over 1 hour – 2 hours	32	24	28	29
Over 2 hours – 3 hours	10	25	18	15
Over 3 hours – 5 hours	6	26	15	13
More than 5 hours	1	6	5	3
Don't know/not stated	3	1	2	2
Base:	359	147	192	711

Comparing different sub-groups of visitors, those on a day trip were the most likely to use the path for 3 or more hours (32%). This differs to the profile of those on a short trip or overnight visit who were more likely to use the path for less than 1 hour (49% and 33% respectively).

Further analysis of the data reveals the following types of respondents were also likely to spend more than 3 hours at the path (16% overall):

- Those aged 35 or under (21%)
- Young Independents (24%)
- First time visitors (26%)
- Respondents travelling at least 21 miles (31%)
- Respondents from overseas (36%)

In contrast the following groups were more likely to spend an hour or less at the site (38% overall):

- Those travelling 5 miles or less (47%)
- Respondents accompanied by a dog (55%)
- Respondents visiting at least once a week (53%)

By comparison the 2005 Scottish Recreation Survey found that 14% of all outdoor recreation trips (including day trips and short trips) lasted less than an hour while 21% lasted 5 or more hours. However visits to the Fife Coastal Path are generally shorter (38% less than 1 hour, 5% five or more hours) than the average outdoor recreation visit taken in Scotland, possibly a reflection of the high levels of use of the path by locals for activities such as dog walking.

Places visited

To find out more about the other types of locations path users were visiting, respondents were presented with a list of six different types of site and asked to specify which, if any, they were visiting during their current trip. Respondents could give more than one answer.

Table 5-23– Places Visited During Current Trip (%)
Base: All respondents - F2F only (667)

	Short Trip	Day Out	Staying Visitors	Total
A beach	45	54	72	53
A town or village	21	32	85	39
A woodland area	7	19	23	13
A cycle route	8	6	8	7
A nature reserve / wildlife centre	2	3	16	6
A golf course	1	1	14	4
Other	5	3	7	5
None	38	21	5	27
Base:	346	140	171	667

Overall, over half of those interviewed (53%) were also likely to visit a beach during their trip, 39% were visiting a town or village and 13% were visiting a wooded area.

There was a difference in responses between the sub-groups in terms of the most popular sites visited – those on a day or short trip were most likely to visit a beach (54% and 45% respectively) whilst the majority of staying visitors were more likely to visit a town or a village (85%). Not surprisingly given their longer trip durations, visitors on holiday were more likely than those on a short trip or day out to visit any of the places listed.

Areas of coastal path used

Respondents were asked which sections of the path they were visiting. When interpreting these figures it should be noted that locations along the path visited are likely to reflect the interview locations included in the survey.

Table 5-24– Area of Coast Visiting (%)

Base: All those using the coastal path - F2F only (607)

	Short Trip	Day Out	Staying Visitors	Total
North Queensferry to Aberdour	9	7	7	8
Aberdour to Kirkcaldy	30	30	9	24
Kirkcaldy to Shell Bay, Kincaig Head to Elie	7	8	8	8
Shell Bay, Kincaig Head to Elie	5	7	6	6
Elie to Crail	27	19	43	30
Crail to St. Andrews	21	17	35	24
St. Andrews to Tay Bridge	8	18	9	11
<i>Base:</i>	307	132	159	607

The path to the south of St. Andrews between Elie and Crail were the most popular sections visited being mentioned by nearly a third of respondents (30%).

The section between Aberdour and Kirkcaldy was mentioned most by those on a short or day trip (30% for both groups respectively) whereas for staying visitors it was the section between Elie and Crail that was most likely to be visited (43%).

Activities

One of the key objectives of the research was to measure levels of participation in different types of activities amongst path users. Respondents were asked to indicate which activities they had taken part in and which activities they intended to undertake. Table 3-25 illustrates the combination of these results.

Table 5-25– Activities undertaken in/ intend to take part in Fife (%)

Base: All those using the coastal path (711)

	Short Trip	Day Out	Staying Visitors	Total
Walking without a dog	46	73	73	59
Walking with a dog	43	16	20	32
Bird watching	9	10	11	10
Eating out	3	3	21	8
Photography	4	3	17	7
Cycling	7	7	3	6
Nature/ natural/ cultural history visit	6	4	9	6
Visiting historic sites	1	3	13	5
Picnic/ Barbecue	3	7	6	5
Relaxing/ sunbathing	4	2	7	4
Visiting attractions	1	3	11	4
Shopping	1	1	12	4
Running/ jogging	3	1	-	2
Swimming or bathing	1	1	2	1
Mountain biking	*	1	1	*
Fishing	-	1	1	*
Golfing	-	-	1	*
Other	4	4	7	5
Base:	359	147	192	711

- nil respondents

* - less than 0.5%

As would be expected, walking was the most popular activity undertaken. In total, nearly three in five respondents were walking without a dog (59%) whilst nearly one-third of users were walking with a dog (32%). A smaller proportion of respondents, one in ten, took part in bird watching (10%) while others took part in photography (7%) or cycling (6%).

Not surprisingly, there were some interesting variations in the types of activities undertaken within the sub-groups. Respondents who were on a short trip were far more likely to be on the path walking with a dog (43%). In contrast, they were less likely than the other groups of respondents to be on the path walking without a dog

(46%) emphasising the importance of the path to local users who are likely to use it for a short period of time but on a regular basis to walk their dog.

Those on a day trip from home were far more likely than those on a shorter trip to be on the path walking without a dog – almost three quarters (73%) of respondents from this group were using the path for this particular activity. Based on the other profile information in the report, it is clear that there are many visitors who travel to the path for a day trip for the sole purpose of walking. Staying visitors were also most likely to be using the path for walking without a dog (73%). They were also more likely to use the path as the base for a range of leisure activities including photography (17%), visiting historic sites (13%), visiting attractions (11%), shopping (12%) and eating out (21%).

Particular likes of path

In an effort to further understand motivations for visiting, respondents were asked to specify, unprompted, what they particularly liked about the path.

Table 5-26– Particular likes about the path (%)

Base: All those using the coastal path (F2F) and all self-completion respondents (711)

	Short Trip	Day Out	Staying Visitors	Total
Views of the sea/ sea views/ near the sea	40	44	55	45
Beautiful scenery	30	30	30	30
Peace and quiet	18	18	16	18
Flowers/ wildlife/ nature	17	20	16	17
Easy walk/ not too hilly	16	15	17	16
The beach	9	5	7	8
Clean and tidy/ well kept	8	8	7	8
Safer than the roads/ safe to walk/ no traffic	7	10	3	7
Good for the dog	7	5	1	5
It's close to home/ handy/ convenient	6	3	2	4
The coastline	1	3	5	3
The area/ nice area	4	1	3	3
Like the sea breezes	2	1	3	2
Good for children	2	2	1	2
Well signposted	1	3	3	2
History of the paths / villages	*	1	4	2
The woodland	2	3	2	2
Good/ maintained path	1	3	1	2
Fresh air	3	1	2	2
Base:	359	147	192	711

* - less than 0.5%

The sea views, and the scenery were the main likes amongst respondents – in total the sea was mentioned by nearly half of all the respondents (45%) while the 'beautiful scenery' was mentioned by approximately one in three (30%).

There were some interesting variations in the particular likes of respondents from the three groups – over half of the staying visitors mentioned the sea as a particular like (55%), a larger proportion than those on a day or short trip – 44% and 40% respectively). However, it is clear that the scenery is a particular 'like' across all types of users of the path – an equal number, 30% for each group mentioned the 'beautiful scenery'.

These findings mirror the feedback from the qualitative focus group discussions held with residents of Fife (as referred to later in this report). It was clear from the focus groups that the respondents all recognised, in their opinion, that they were fortunate to live in an area surrounded by attractive scenery and sea views.

Improvements

Respondents were also given the opportunity to suggest any possible improvements to the path. Emphasising the positive attitude towards the path in general, 36% of respondents could not think of anything that could be improved. This proportion increased to 47% for those interviewed on the section of path north of Fife Ness and encompassing St. Andrews. Respondents staying overnight and those from overseas were also most likely to feel that nothing needed to be improved – 45% and 52% respectively.

Table 5-27– What do you think needs to be improved? (%)

Base: All those using the coastal path (F2F) and all self-completion respondents (711)

	Short Trip	Day Out	Staying Visitors	Total
Better/ improved signposting	7	6	9	8
Tidy up litter	6	8	3	6
Better maintenance of steps/ paths	9	4	3	6
Dog mess should be cleared up	7	4	4	5
More litter bins/ dog litter bins	7	4	3	5
Overgrown paths	4	3	2	3
Some road maintenance needed/ tidy up pot holes etc	4	3	2	3
More/ improved toilet facilities	3	4	1	3
Gravel/ chips/ stones makes it difficult for wheelchairs/ prams/ cycles etc	1	3	2	2
Nothing/ fine as it is	28	42	45	36
<i>Base:</i>	359	147	192	711

A number of improvements were mentioned although signposting, litter and the condition of the path were the only three individual aspects mentioned by more than 5% of respondents. Although the above proportions appear relatively low, their

significance should not be underestimated given that they were responses to an open-ended question with no prompting given on possible improvements. In particular, the issue of better/ improved signposting should be noted as this was mentioned by nearly one in ten (9%) staying visitors – this issue was also raised in the qualitative focus group discussions as a potential area for improvement.

Rating the path

So that satisfaction levels could be measured regarding a number of specific features related to the path, respondents were presented with a list of services and facilities and asked to rate them on a five-point scale from 'very good' to 'very poor'. Respondents were also given the option to indicate that they were not aware or didn't use the services or facilities mentioned. To make the tables below as clear as possible, a score was applied to each of the rating scales, from 5 for 'very good' to 1 for 'very poor'. On this basis it is encouraging that most of the average scores below are all around 3 or 4 suggesting reasonable levels of satisfaction with all aspects.

Table 5-28– Rating of Facilities/Service along the path - (Mean Summary Table)

Base: All respondents (711)

	Short Trip	Day Out	Staying Visitors	Total
Car Parking	4.06	4.34	4.17	4.15
Information and signage	3.86	3.96	3.99	3.92
Paths	3.93	4.25	4.20	4.07
Public toilets	3.13	3.64	3.30	3.31
Catering facilities	3.12	3.69	3.65	3.45
Provision of litter bins	3.37	3.72	3.78	3.55
Seating	3.51	3.97	4.02	3.74
Base:	359	147	192	711

Overall, the car parking and path itself were the two facilities that rated highest (4.15 and 4.07 respectively). However, lower scores were obtained for the provision of litter bins (3.55), catering facilities (3.45) and the public toilets (3.31), suggesting potential for improvement.

These findings also mirror the feedback obtained in the qualitative focus group discussions held with Fife residents when a lack of information, more litter bins and catering facilities were all cited as areas that needed improving along the path.

These findings are largely reflected when analysed by visitor type – those on a day trip rated the public toilets and car parking slightly more highly than the other visitor

types (3.64). In contrast, those on a short trip were likely to be more dissatisfied with the catering facilities available (3.12).

If a respondent rated a service or facility as 'poor' they were given the opportunity to give further details. The most frequently provided comments were as follows:

- *Car Parking* – Uneven surface/ potholes – 8 respondents
- *Information and Signage* – 'Not enough' – 17 respondents
- *Paths* – Badly maintained/ needs resurfaced – 16 respondents
- *Public Toilets:* – Closed / closed in winter – 36 respondents
 - Very grubby/ dirty – 27 respondents
 - Not enough – 20 respondents
- *Catering Facilities* – Not enough – 22 respondents
- *Litter Bins* – Not enough litter bins – 67 respondents

Although the proportion of respondents raising these issues is relatively low, it is evident that locals on a short trip were on the whole, most likely to give a poor rating to facilities and more likely to provide specific suggestions for improvements.

Other facilities would like to see

Highlighting the high levels of satisfaction with the path, just one in five respondents (19%) indicated that they would like to see other activities or facilities provided on the path.

Table 5-29– Activities or Facilities Would Like to See Provided (%)

Base: Those respondents who would like to see activities or facilities that are not currently provided (N=221)

	Short Trip	Day Out	Staying Visitors	Total
More/ lack of seats	14	8	9	11
More dog bins	12	8	5	9
More/ lack of toilets	14	3	5	9
More/ lack of catering facilities	8	3	8	7
More/ lack of information about views/ attractions	4	10	9	7
More litter bins	10	5	2	6
Telescope or observation platform	2	5	3	3
More signposts	3	5	3	3
Snack Bar/ kiosk	2	3	3	2
Cycle paths/ lanes	1	8	2	2
Base:	114	39	64	221

Overall, the provision of *more seats* was mentioned by over one in ten users (11%). This suggestion was more of an issue for those on a short trip with 14% providing seating as an answer. Reflecting responses to the previous rating and improvement questions, those on a short trip were also more likely to refer to the need for *more dog bins* (12%) and *more/ lack of toilets* (14%) than the other visitor types.

These research findings are backed up by those from the 2004/2005 user survey undertaken by FCCT. Respondents from this survey were asked to cite up to three additional facilities that they would like to see on the path. A quarter of respondents (25%) mentioned the need for *improved public toilets* with a smaller proportion mentioning *improved seating/ benches* (15%) and *litter bins* (15%).

Expectations

All respondents were asked how their visit or day out compared with their expectations before visiting:

Table 5-30– Expectations (%)

Base: All those using the coastal path (N=711)

	Short Trip	Day Out	Staying Visitors	Total
Better than you expected	12	11	26	16
About the same as you expected	75	74	55	70
Worse than you expected	*	-	1	*
Didn't know what to expect	2	5	10	5
Don't know/ not stated	11	10	7	9
Base:	359	147	192	711

* - less than 0.5%

- nil respondents

Nearly one in six respondents (16%) thought that their visit or day out had been better than expected. This figure increased to just over a quarter for staying visitors (26%). Other segments more likely to state that their visit was better than expected were first time visitors (36%), those using the path for two hours or more (26%), visitors from England or Wales (26%) and overseas visitors (40%).

The majority of respondents (70%) stated that the path was as expected, not surprising given the high volume of frequent path users.

Only three respondents claimed that their visit was worse than expected.

Those respondents who indicated that their visit had been better than expected were asked to give reasons for their response. The main reason given was the good weather at the time of the visit which accounted for nearly a quarter of all responses (24%). The scenery was also a popular reason, mentioned by 15% of respondents.

Table 5-31– Reasons Better Than Expected (%)

Base: Those respondents whose visit was better than expected (N=114)

	Short Trip	Day Out	Staying Visitors	Total
Weather	32	19	19	24
Lovely scenery	5	6	27	15
Easier walk than expected	9	6	17	12
Good/ clear signs	-	-	4	4
Pretty and lots of amenities	5	-	4	4
Well laid out	2	6	4	4
Beach lovely and clean	2	-	6	4
Quality of paths	5	-	6	4
Like wildlife/ flowers/ birds etc	2	13	2	4
Nice coastal route near the sea	2	13	2	4
More challenging than expected	5	6	-	3
Don't know/ not stated	30	38	15	25
<i>Base:</i>	<i>44</i>	<i>16</i>	<i>52</i>	<i>114</i>

- nil respondents

Other reasons for visits

Although the majority of respondents interviewed were specifically there to use the path, a small minority indicated that they were only using the car park at the path. The majority of these visitors were on a short trip (65%). Table 3-33 below illustrates their main reasons for using the car park.

Table 5-33– Main Reasons For Using The Car Park (%)

Base: All those using car park – F2F only (N=60)

	Short Trip	Day Out	Staying Visitors	Total
Access to beach	28	25	33	28
Use local amenities	31	13	33	28
To see the view	13	25	50	22
To stop for a break/ have lunch etc	18	25	-	17
Base:	39	8	12	60

- nil respondents

Please note that the small sample sizes involved means that care should be taken when interpreting the findings for this question.

Loyalty to path

Respondents were asked how likely they were to come back and use another section of the path on another day. Overall, loyalty levels towards the path were high with over two-thirds of respondents (68%) indicating that they were 'very likely' to return and use the path. Only a small minority indicated that they were unlikely to return to the path (3%).

Table 5-34– How likely are you to return to the path (%)

Base: All those using the coastal path (N=711)

	Short Trip	Day Out	Staying Visitors	Total
Very likely	74	69	55	68
Quite likely	18	26	35	24
Neither likely nor unlikely	3	2	4	3
Not very likely	1	1	3	2
Not at all likely	2	1	1	1
Mean Score	4.66	4.62	4.44	4.60
Base:	359	147	192	711

Understandably, those visitors on a short trip or a day out, many of whom will live near the path, were the most likely to indicated they would return to use the path.

Even so, over half of all staying visitors (55%) also stated they would return reflecting the attractiveness of the path across the different sub-groups.

The finding above is mirrored when those respondents staying away from home were asked how likely they were to return to Fife on holiday at some stage over the next five years. Overall, the vast majority indicated that they were very or quite likely to return in this timescale (90%). Only three respondents out of the 171 staying away from home indicated that it was not very likely that they would return.

Expenditure

Respondents were asked to indicate how much they had spent on their visit or day out. Table 3-32 below illustrates average daily expenditure per day for all respondents.

Table 5-32– Amount spent per person per excluding those who spent nothing on category

Base: All respondents (N=667)

	Short Trip	Day Out	Staying Visitors	Total
Accommodation*	-	-	£73.11	£73.11
Food and drink	£10.27	£10.79	£31.09	£19.67
Admission fees	£2.56	£2.04	£11.56	£6.00
Shopping	£25.78	£13.50	£50.27	£42.10
Transport	£10.59	£8.90	£13.02	£10.65
Equipment	£8.50	-	£25.00	£16.75
Other miscellaneous	£21.69	£2.25	£24.92	£20.35
Total including accommodation	£15.86	£13.95	£92.13	£45.12
Base:	346	140	171	667

* Based on those spending 1 night away from home

Overall 60% of path users spent anything during their visit to the path. Amongst these users the average spend per day on the above categories was around £45. The average spend per path user, including those who spent nothing was £26.

The findings regarding expenditure were an important input to the analysis of the economic value of the Fife Coastal Path as described in more detail later in this report.

Newspaper readership

Finally, UK residents were asked which daily newspapers they read on a regular basis. Overall, the most frequently read paper was 'The Courier' (18%), with residents from East Neuk (31%) and those interviewed on the path near to St. Andrews (25%) most likely to read this paper. The 'Daily Record' was the next most read paper with 14% of all respondents.

When asked which Sunday papers they read on a regular basis, if any, the most frequently read paper was the 'Sunday Mail' (20%). Smaller but significant proportions stated that they read the 'Sunday Post' (15%) or 'Sunday Times' (11%).

Desk Research

An element of the project was to review other studies undertaken for similar paths and long distance walks in the UK. It became clear after contacting bodies and agencies responsible for paths and long distance walks in the UK that this survey was, in many ways, unique in being one of the biggest and most comprehensive of its type and far more robust in terms of sample size than other surveys. After a thorough investigation it is our opinion that, on the whole, the information available to us was either not representative or robust enough to use in comparison with this survey.

Many of the surveys we reviewed had used a more qualitative style to their questionnaire design and were mostly part of a wider evaluation programme rather than a focussed survey covering market information and economic impact analysis. Other surveys had extremely low response rates, and hence, sample sizes which were not representative enough to use with confidence.

Perhaps of most significance in terms of comparable research is the previous surveying of the Coastal Path undertaken by FCCT in 2004/2005. It is evident that the key strengths of the path haven't changed in the eyes of the users who enjoy the beautiful scenery and sea views, the easy access to the path, the wildlife and opportunities for bird watching. In terms of areas for improvement, the current survey has again drawn attention to those areas highlighted for improvement in the previous 2004/2005 surveys in that there is a clear need for improved signposting and more detailed information and interpretation along the length of the path. The issue of maintenance of facilities on the path such as public toilets and litter bins also still remains an emotive issue that requires addressing.

5.2 Estimate of total number of visits per year

One of the main objectives of this study was to produce an estimate of the total number of visits taken to the Fife Coastal Path per year.

Method

To produce this estimate, data on the number of path users observed was collected during all 56 interviewing shifts, a combined period of over 330 hours. As described in Section 5.2 these counts took place at 18 locations along the path route and were distributed across the full 12 month survey period from July 2006 to June 2007.

Interviewers counted the number of adults and children on foot, visitors on bikes, motorbikes and horses, as well as the number of dogs, prams and wheelchairs.

To obtain an estimate of the total number of visits taken to the path during the 12 month period the following stages were followed:

- For each location where counting took place the average number of users observed per hour was calculated, overall and for different time periods (e.g. weekends, weekdays, summer months, winter months).
- For each location these averages were then applied to the total number of days per year within each of these different time periods.
- By adding together the estimates for each count location an overall estimate of annual visits to the path was obtained.

It should be noted that the estimates obtained from this method are of visits rather than unique visitors. The results of the survey reported in Section 3 suggest that some users visit the path on a very regular basis, sometimes every day. Therefore the number of individuals using the path may be somewhat less than the estimate of visits.

Results

It is estimated that between 480,000 and 580,000 visits were made to the Fife Coastal Path between July 2005 and June 2006. Applying the results of the user survey to this total provides an estimate of the number of visits taken by different groups of users as illustrated below.

Table 4-1– Estimated visits to Fife Coastal Path July 2006 to June 2007

	Low estimate	High estimate	% of visits (from user survey)
Staying visitors/ tourists	125,000	151,000	26
Day out of 3 hours+	96,000	116,000	20
Short visit under 3 hours	250,000	302,000	52
TOTAL	480,000	580,000	100

By comparison annual visits reported by some of the main visitor attractions in Fife during 2006 were as follows³:

- Deep Sea World - 270,000 visits
- Abbot House – 93,000 visits
- St Andrew's Castle – 64,000 visits.

In other parts of Scotland, outdoor recreation sites reporting a similar number of annual visits to the Fife Coastal Path included Mugdock Country Park (540,000 visits), Pentland Hills Regional Park (515,000 visits) and Bescraigs Country Park (436,000 visits).

³ VisitScotland, Visitor Attractions Monitor 2006

5.3 Estimates of economic benefits

This section of the report presents the main findings from the economic impact analysis. The approach taken follows the UK Sport methodology⁴ for assessing the economic impact of recreational activity as described in more detail below.

Economic impact headline findings

The analysis has taken account of expenditure made by visitors to the path, drawing on the data collected in the survey of path users. Based on this expenditure data, and estimates of visitor numbers, it has been possible to estimate the total economic impact of visitor expenditure arising from use of the path.

Figure 5-1 shows the overall economic benefits for Fife associated with this visitor expenditure.

Figure 5-1

FIFE ECONOMIC IMPACTS		
	Low case	High case
	(480,000 visitors)	(580,000 visitors)
Net expenditure	£24 million	£29 million
Output Effects	£32 million	£38 million
Employment Effects	800 FTEs	929 FTEs
Income Effects	£8 million	£10 million

NB: Expenditure, Output and Income effects are rounded to the nearest £million. Employment effects are rounded to the nearest hundred FTEs

Definitions of the four ways in which the economic benefits are expressed are provided below:

- **'Net expenditure'** refers to the additional expenditure made by visitors that can be attributed to their visit to the path.
- **'Output'** refers to the value of goods and services produced in the local economy as a result of the increase in visitor expenditure.
- **'Income'** refers to the change in profit, wages and salaries retained within the area as a result of this new expenditure
- **'Employment'** refers to the number of Full Time Equivalent jobs. (FTEs) supported by the new expenditure associated with the path for one year.

⁴ UK Sport (2004), Measuring Success 2 - The Economic Impact of Major Sports Events

Importantly, whilst this measure indicates full time jobs, the path is likely to demonstrate seasonal employment patterns and so create more part-time jobs but over a shorter time period.

Path users

As discussed in Section 5.2, the total number of path visits was estimated to be between 480,000 (low case scenario) and 580,000 (high case scenario).

The ability to attract visitors from outside Fife and Scotland is critical to the economic value of the path. Looking at the additionality of trips, it is clear that the path plays an important factor in attracting people to the area. On the basis of the survey of path users, the path was the main or sole reason for most of the trips made (61% of Path users).

Economic impact methodology

Based on expenditure questions asked in the path user survey, path users generated a total gross expenditure of between £56 million (low case) and £68 million (high case).

The results presented in Figure 5-1 adjust gross expenditure for displacement, additionality and multiplier effects to provide net impact figures. More specifically, the UK Sport methodology for assessing economic impact makes two key assumptions in reference to displacement and additionality. These are:

- **Displacement-** all expenditure made by residents within the impact geography (Fife) would have been made in the area anyway at a later date. Therefore the expenditure of these groups is entirely discounted from the net additional expenditure.
- **Additionality-** some individuals may visit the path as part of a wider holiday, but if the path was not their main reason for making their trip, then the expenditure from all other days of the trip are not additional to the event. Therefore where respondents have stated that the Fife Coastal Path was their primary motivation for making their trip, all of the expenditure is treated as additional. Where the path was only one of several reasons or of no importance at all, only their daily expenditure is attributed and all accommodation expenditures are removed as well.

Accounting for displacement and additionality allows us to determine the total net expenditure. Net expenditure associated with the Fife Coastal Path was calculated to be between £24 million (low case) and £29 million (high case).

Once an assessment has been made of the total net additional expenditure, a series of multipliers⁵ are applied to account for the wider knock-on effects to the economy. These include supplier and income effects. This suggests that the Fife Coastal Path creates:

- Between £29 million and £32 million of new output to the Fife area.
- Between £8 million and £10 million of new income to the Fife area.
- Between 800 and 900 Full Time Equivalent (FTE) jobs for one year in the Fife area.

Distribution of benefits

The major beneficiary groups of this additional economic impact are likely to be accommodation providers, bars and restaurants and the retail sector. Based on the breakdown of visitor expenditure recorded in the path user survey, our analysis suggests that:

- the accommodation sector gained around 37% of all additional expenditure.
- the food and drink sector gained around 33% of all additional expenditure.
- the retail sector gained between 20% of all additional expenditure.

⁵ The Scottish Tourism Multiplier Study from 1991 has been used as the basis for multiplier values. Since the Study does not provide Fife specific multipliers, Tayside figures were selected as the closest comparator area.

5.4 Focus groups with local people

A qualitative phase of research was conducted in early March 2007. This phase allowed more in-depth exploration of results gained from the quantitative visitor survey amongst residents of Fife. Three focus groups were conducted with the following groups:

1. Users of the Fife Coastal Path who visited the path at least once a fortnight, normally to walk their dogs. This group consisted of people aged over 55 with no children in the household (Empty Nesters) who were residents of the Kirkcaldy area;
2. Users of the Fife Coastal Path who visited the path at least once a fortnight but not to walk a dog. This group contained residents of Anstruther in a range of age groups.
3. Respondents in third group were in the Family lifecycle (children in the household) but were non-users of the path i.e. they had not visited at all or for at least 2 years. However all normally took visits to the outdoors for leisure purposes in other local places. All lived in Burntisland.

Each focus group was one and a half hours in duration and the respondents were paid an incentive fee to encourage attendance and cover childcare and travelling expenses. The focus groups were held in meeting facilities in Dysart, Anstruther and Burntisland respectively and were moderated by researchers from TNS Travel and Tourism.

This qualitative stage of the research allowed for more in-depth analysis and exploration of issues raised from the results of the quantitative phase. This phase also provided insight into why some local residents who visit the outdoors for leisure purposes do not make use of the Coastal Path. Each group also allowed respondents to evaluate the printed materials available about the path, as well as the FCCT website.

Activities and motivations

The respondents included in all three of the focus groups were users of the outdoors, with two of the groups comprising individuals who used the Fife Coastal Path routinely and one including individuals who did not use the path but visited other outdoor recreation sites. Motivations for visiting the outdoors mentioned across all three groups included fresh air, views and scenery, peace and quiet, spending time with family and friends, 'entertaining' children/grandchildren, being in the natural environment, enjoying flora and fauna and seeing wildlife.

Respondents across all three groups appreciated opportunities for outdoor recreation that were free to use. The general consensus was that Fife was a good area for things to do, with respondents appreciative of local amenities. Car parking was not a particularly big issue for respondents, a number of whom used local public transport or walked to facilities in the local area. The provision of toilets was important for respondents in the two path user groups, with the non-dog walkers indicating that these facilities were being neglected, with toilets either not properly maintained or being closed down.

Outdoor recreation sites visited

For users of the path who owned a dog, exercising their dog was an important motivation for visiting the outdoors, whilst those who did not use the path were particularly likely to be motivated to visit the outdoors in order to spend time with their children. Some respondents also mentioned an interest in photography.

Other locations within the local area visited by those attending the groups included beaches and parks. Respondents who did not use the Coastal Path mentioned a wider variety of places visited for leisure purposes including Burntisland Links:

"I'd say that most people in Burntisland with kids...the place you'd find them is the Links"

Here there is a bouncy castle, a play park, a water park, crazy golf, a swimming pool and occasionally, fairground shows. For these respondents, this was a valued location to visit due to the variety of facilities and activities available for children in a single, safe location.

Beaches were also appreciated by this group and those who normally visited the path for reasons other than to walk a dog. These respondents felt that the advantage of using beaches in the local area were their accessibility and mentioned that,

especially in summer time, the area's beaches were popular outdoor recreation destinations for local residents.

Specific locations that respondents used included Kilrenny Common. One respondent also mentioned that this site will be undergoing improvements, including the introduction of facilities for the blind. Another site was Cambo, which is a well known site for snowdrops and attracts a number of visitors for this reason.

Other specific local locations mentioned were Ravenscraig Park, the Glenrothes River, Balbirnie Park, Ladybank Forest, the Lomond Hills and the Falkland Estate. One respondent in the dog walking group mentioned that they were aware of over 140 walks in the Fife area alone, with other respondents in this group agreeing that within the local area they were "*spoilt for choice*".

Blue flag beaches

Respondents in all three groups were aware of Blue Flag beaches and that these beaches are classified because they meet certain standards. Beaches in the local area that were thought to be Blue Flag beaches were St. Andrews, Kingsbarns, Burntisland and Elie.

Non-dog walking users were "*naturally inclined to go for a safer beach*", with one respondent in this group stating that they purposefully visit Elie beach because it is clean and safe for their children. Non-users of the Coastal Path felt that the problem of dog dirt on beaches had improved since access with dogs was restricted.

The dog walking respondents mentioned that were aware of the restrictions on access to these beaches. However, they were happy to abide by these regulations and they all felt that the rules were a reflection of the fact that many other walkers did not pick up their dog's waste (see later). These path users felt that the signposting should be clearer as some had unintentionally gone onto a Blue Flag beach while walking their dog and felt embarrassed when approached by other users.

Likes about the Fife Coastal Path

Respondents in the Anstruther group (walkers without a dog) appreciated the **scenery** when using the Coastal Path. They mentioned that there was a lot to see and they particularly appreciate how this varied by season. These users also felt that the path was a good place for a wide variety of activities ranging from short walks to specific 'hobbies' such as fishing or birdwatching. All of the path users were appreciative of having **easy access** to a path such as this **close to their home**.

Most of the dog walkers felt that the path was easy to walk along in that it is fairly level and without many hills to climb, making it **accessible to everyone**. **Lack of commercialisation** was also something that these users appreciated about the path, along with the **wildlife** in the area. Photography and bramble picking were other activities undertaken on the path by some members of this group.

Dog walking users also appreciated the scenery on the Coastal Path and enjoyed living next to the coast in general:

"There's always something happening...endlessly fascinating"

"...something invigorating about the naturalness of it all..."

Both user groups felt that the **heritage** associated with the villages along the coast were also important. They liked walking on the path **away from the traffic** both for the **peace** and for those with children, that it is **safe** for their children. As may be expected, these users appreciated being able to walk their dogs on the path, particularly as in wet weather they have found that there are sections of the path that are not too muddy and prefer these to walking their dog in a park or wood. They also liked being able to let their dogs off the lead without having to worry about livestock.

Users with children enjoyed taking family walks along the path. They mentioned that their children liked to play in the water, picking up shells, splashing in pools etc. Parents liked taking their children along the path as it would keep them entertained and mentioned that there were a number of play parks along the path that their children enjoyed visiting. The dog walking users also agreed with this, stating that there is always something for children to see along the path.

When asked about favourite sections of the path, users in the Anstruther group highlighted the Anstruther to Crail section, which they liked for the parks along the way and the rocks for children to play on. The Kirkcaldy-Dysart-West Wemyss

section was also singled out as a section with particular historical interest such as the caves used by smugglers. Respondents also liked visiting the Harbour and one mentioned that it was “*well worth*” a visit to the Harbourmaster’s House attraction. This group felt that most sections of the path were “*nice, all for different reasons.*” They felt that the variety of scenery along the path meant that it would appeal to different types of people.

Sections that users in the dog walking group particularly liked included the stretch between Leven and Largo due to the scenery on this section such as the rock formations and the beach. Lower Largo to Shell Bay was also liked for these reasons but also because users of this section were able to walk high above the chain walk where there are “*fantastic views.*” Respondents in the dog walking group felt that a unique point about the path is that it is easy to break it up into sections to walk.

Barriers to use & issues

Length of walks

Respondents in the non-users group were residents of the Burntisland area and most had been aware of the Coastal Path for a number of years. In fact, a number of respondents in this group recalled using the path when they were younger:

“When we were younger, we used to walk it all the time”

“As a child, everybody who lived up there was along there”

The experiences recalled of using the path were positive ones, however, as parents, respondents in this group were reluctant to take their children to the path for a number of reasons. Although they viewed the path as a nice place to visit, they felt that the walk from Burntisland to Aberdour was too far with young children:

“I wouldn’t dream of taking my kids up there...as much as I had fun when I was a kid, it’s much too long”

One respondent mentioned that it used to be possible to have a picnic at Starleyburn, which they enjoyed but that a walk to Aberdour was too much for their children and they ended up carrying them back home.

Safety

Respondents in all three groups mentioned that certain parts of the Coastal Path were unsafe. Respondents with children in particular were concerned about the lack of fencing at places where the path drops sharply into the sea e.g. the high cliffs

along the Anstruther to Pittenweem section. In certain weather conditions, they felt that the path was too slippery and worried for their children's safety. Burntisland residents also felt that the path was unsafe due to the lack of lighting and that it felt quite isolated if you were out on your own.

Users of the path also mentioned that erosion at certain points on the path caused them problems, for example, Pettycur Bay when the tide is in and erosion around St. Andrews were mentioned as sections of the path that were difficult and quite dangerous. One respondent mentioned that the stones on the path near St. Andrews and the steep fall made it very dangerous, particularly in wet weather. It was suggested that hand-rails at certain points on the path would make it safer to use.

The condition of the path was a barrier for the non-user group, all of whom had children, as they found walking along the path too difficult with prams, pushchairs, etc. These respondents were also put off by the condition of the path(s) leading onto the Coastal Path, which they felt were overgrown and poorly maintained. Users who cycled on the path also felt that sections such as the path towards Leven were dangerous for cycling.

Respondents felt that improvement to the path surface was both important and necessary and that very little is presently being done about it, particularly in areas that have been quite heavily eroded. However, respondents in all three groups expressed a desire to keep the path as natural as possible and felt that the addition of concrete lampposts, red dog bins etc. would spoil the 'naturalness' of the path:

"If they are going to tarmac it, what's the point of going a walk out in the countryside?"

"...wear appropriate footwear...if you're going for a walk, you kinda know what you're doing..."

Other issues

All groups mentioned that there was a problem with dog dirt on the path, including those in the dog walking group. Respondents in this group were unhappy that other dog walkers would often leave their dog's mess on the path, even when there is a dog bin nearby. They stated that there were a lot of dog owners that did not clean up after their dog but that no one was being caught for doing this. The promenade at Kirkcaldy was mentioned as a location that is particularly bad. One respondent had

asked dog wardens to visit this location, with others mentioning that they had never seen a dog warden out and about.

Respondents in both of the user groups also felt that there is a conflict between golfers, the caravan parks and users of the Fife Coastal Path, with users feeling that golfers were higher up "*the pecking order*." These respondents felt that at the same time as the path has eroded, the golf courses and caravan parks have expanded, for example, towards the northern end of the path. This was an issue they felt would get worse as the path eroded even more in future. At some points, they mentioned that the path becomes quite narrow because of this and they felt it would be helpful if you could walk across some parts of the golf courses. Users in the dog walking group mentioned that in some places the path does go onto golf courses (e.g. Kingsbarns) but that they had not had a problem with the golfers when using these sections.

Users in the dog walking group mentioned Methil as a section of the walk that they did not find attractive. The part at Inverkeithing was described as "*industrial*" and "*overgrown*" and as a section with few "*natural attractions*", while the section near Dysart past the mine was mentioned as having a lot of rubbish, much of which comes over from the Industrial estate. They felt the factories should take responsibility for cleaning this up.

Respondents in the dog walkers group mentioned that motorcycles and quad bikes would also be a problem when using the path, although motorcycles are less of a problem now than they were a year ago.

Facilities

While the provision of a café would be appreciated by non-users from the Burntisland area, they did not feel that there were any points where a café could be situated. Non-dog walking users were less concerned about having a café on the Coastal Path as this was not the reason they chose to use it. They indicated that if a café was there it would be used by people on the path because it was convenient – "*...would use it if it was there but wouldn't go looking for it...*" - but felt that the villages along the path provided ample opportunities to use this type of facility if people wanted to.

Users in the dog walking group very much appreciated having a café in Dysart and felt that it had made "*a fantastic difference*". They like the convenience of having a café to go to and felt that this had an influence on where they choose to go. If they want to make more of an afternoon out of a walk, then having a café allowed them to

do that. A respondent cited their experience of visiting Devon in January where even when the weather was bad, there were still plenty of people using the cafés. They felt that there was a missed opportunity along the Coastal Path and that if they were there, café facilities along the path would do well. Dog walking users also suggested that a visitor centre with a shop, that was well signposted, would be a good facility to have along the path so long as staff (perhaps volunteers) were available to keep it open.

Users in the Anstruther group felt that the provision of toilets was an issue. At present, they felt that there was a fairly good level of provision, particularly in the villages but mentioned that such facilities were progressively being closed down in a number of places, in their opinion, to save money. Seasonal variations in opening times were also mentioned, with respondents expressing a wish to have toilets with regular opening hours throughout the year that are monitored more for cleanliness. Dog walking users also agreed that toilets were an important facility.

Car parking was an important facility for users in the dog walking group but less so for the non-dog walkers and non-users of the path. Dog walking users liked the fact that parking in Fife is free.

Potential improvements

Burntisland residents (the non-users group) mentioned the provision of picnic benches along the stretch from Burntisland to Aberdour as an improvement they would like to see made to the path. Fencing was also an issue, particularly for respondents in all of the groups with children and this was something that they felt needed to be improved in order to make the path safer to use.

A lack of litter bins and dog waste bins was something that respondents felt could be addressed to improve the Fife Coastal Path. Non-users of the path mentioned that when they had last used the path, it was not particularly bad for litter but that they felt that the reason dog dirt was an issue was because there was nowhere to dispose of it. They felt that people were unwilling to carry dog waste for miles along the path to dispose of it and that it was unreasonable to expect people to do so.

Dog walking users felt that dog mess should be monitored more, including out of office hours and that where litter bins are going to be provided, they needed to be emptied more often. Respondents recognised that emptying bins was not always that

easy for those maintaining the path but felt that if they were going to be there, they needed to be emptied regularly.

Respondents in the Anstruther group suggested that there should be a fine for leaving dog mess and that this was something that should be monitored more. This group felt that educating owners was important as facilities to counter the problem were only useful if people actually use them. For example, bags are provided for dog waste along the path, however, these bags are often left by the side of the path, which these users felt was worse than the mess being left on the path.

Respondents in the dog walking group suggested that there should be some way of reporting litter, such as that near the Industrial estate by Inverkeithing (see earlier). They felt this would help FCCT and the ranger service to know where they should go as it is difficult for them to monitor all sections of the path. This group also suggested that small volunteer groups within communities could be set up to monitor different sections of the path or even that people doing community service could be used to pick up litter. They acknowledged that the first of these ideas would require volunteers who were really determined to look after the path.

Respondents in the Burntisland area felt that while the public transport system in the area was good and routes ran parallel to the path, access to the path could be an issue. Users of the path (non-dog walkers), however, felt that the public transport system from bus stops and stations was good enough and some stated that they sometimes used the bus to go somewhere, walking home along the Coastal Path.

Whilst respondents desired to keep the path natural, there was a recognition that the path was unsuitable in a number of places for wheelchairs, prams, pushchairs and at some points, bicycles. This not only relates to path surface but also to the type of gates which exist on some parts of the path. Respondents in the Anstruther group suggested that a solution may be to smooth out certain sections of the path or have a separate path that was more suitable for these users.

A general comment made by users of the path was that it would be useful to have more open and on-going consultation with local residents about the path such as a comments book where people could record opinions and suggestions. The creation of a users group was also suggested, where issues could be raised and an action plan agreed upon. They also felt that the local press should include more features about the path.

Marketing influences and information

General

Non-users of the Fife Coastal Path tended to use the free local press as their main source of information on local events and places to visit, with websites giving details of what is happening in the local area also mentioned. Informally, word of mouth was also an important information source for this group.

Respondents who used the Coastal Path for reasons other than dog walking tended to rely on local knowledge when planning a leisure trip within the area. If they were planning a trip outside of the local area, then respondents in this group tended to rely more on leaflets such as those available in Tourist Information Centres (TICs) and museums.

Although they were local residents, respondents in the dog walkers group mentioned that they also found tourist brochures helpful in providing information about the area and where to go. The notice board in the library about local events and places to go was also mentioned as a valuable information source. The Internet tended to be used by some members of this group when planning where to take guests or for longer days out, though the information provided locally on notice boards and in local newspapers was also useful on these occasions. This group also used books about walks in the area and found that they learned things from these books even though most had lived in the area for a number of years. Hamish Brown's book *The Fife Coastal Path* was one that many members of this group had used and rated highly. Some of the path users who were members of a local walking group mentioned that they used an Ordnance Survey map, as well as a map of the Coastal Path that is available for purchase, when planning and going on walks along the path.

In general, users who were not dog walkers felt that more information on the tides would be useful. In addition to knowing when it is high tide, these respondents felt that there was a need to provide information on how to deal with times when the sea was at high tide i.e. what the alternatives are if sections of the path are unusable for this reason.

Respondents in the dog walkers group suggested putting leaflets about the Coastal Path on the Rosyth Ferry to give visitors more information about the route, as well as

other things to do in the area. It was also suggested that videos of the path could be shown on television screens on the ferry. However, one respondent had seen the video shown in the Harbourmaster's House and felt that it did not show enough of the path – “*don't get the impression anyone's actually walking on this thing.*”

Information on the path

Current non-users of the path mentioned signposting as an area with potential for improving the experience of using the Fife Coastal Path. Currently, they were only aware of “*a couple of little wooden signs*” and “*ones that tell you where you can cycle*”. They felt that the path could benefit from signposts both on and off the path. Non-users also felt that information boards about the path and the local area would be a welcome addition to the Coastal Path.

Both users and non-users were keen to see signs that show people how to get on and off the path. Current non-users also felt that an indication of how long it is to walk to the next opportunity to leave the path would be helpful, whilst non-dog walkers felt that distance markers in general would be useful. Path users also mentioned that more could be done to link the path to other walks and places of interest such as the snowdrops at Cambo and to show visitors to the area how to deviate from the path to villages and other places of interest.

Other suggestions relating to signage included one in the dog walkers group that signs giving information about the path surface at different sections would be useful. Another suggestions in this group was that signs reminding path users to respect golfers when the path goes onto a golf course and informing people of etiquette regarding who has right of way would be a good idea.

Both of the user groups felt that there was potential to improve the information provision along the path by adding more interpretation boards. They were keen to see local and historical information provided, for example, information on the Burntisland railway or the historic ruins and more generally, about the path (how it started, interesting information, flora and fauna, etc.) They felt that tourists would also appreciate information on things they might see while using the path and that there are a number of points of interest along the path that would benefit from further information. It was suggested that information from Hamish Brown's book *The Fife Coastal Path* should be used on these boards, which would both provide information and advertise the book.

FCCT website

Respondents in the dog walkers group felt that the 'newsflash' items on the homepage of the website did not give enough information, for example, the date that the information was posted. Also, they would have liked to have seen more on the killer whales story and more information about why the path was closed and when this information would be updated. Respondents in this group tended not to use the Internet very often but they did appreciate being able to access the web at the Harbourmaster's House and they liked the links to other websites.

Non-users of the path liked the graphics used on the Fife Coastal Path website and recognised the logo. However, they felt that details of paths leading to and from the Fife Coastal path to towns and villages would allow people to see not only how to get on and off the path but also how long they would have to walk, once on the path, before they were able to come off. At present, they felt that once you were on the path, you would be unaware of how long you would have to stay on for and that this was a particular problem if there were children in your party.

Both users and non-users of the path felt that the website lacked some information that they, as locals, would find useful. Information that was seen to be missing included facilities such as play parks, toilets and bus timetables. Respondents in the Anstruther group also felt that information related to nature would be of interest. It was suggested in this group that separate sections for children, tourists and locals would be best as information such as accommodation in the area was of little interest to local residents.

It was also suggested in the Anstruther group that the sections of the path shown on maps could be organised in such a way that it is possible to search between towns that users type in or select. At present, the path is broken up into sections determined by FCCT but users of the path expressed a wish for this to be more flexible.

A respondent in the dog walkers group felt that the accommodation link on the website could be improved. They often looked for places to stay so that they could walk along sections of the path that are farther away from where they live and were not happy with the link to the VisitScotland website. They felt that the site was incomplete and that some towns were not covered by this site at all (for example, Elie). They felt that more should be done in the way of providing information about

accommodation on the FCCT website itself and there should be a local source of information for accommodation rather than referring people to VisitScotland.

Fife Coastal Path leaflet

Users in the Anstruther group like the FCCT logo, with one respondent commenting that it looked like the land and sea. Those in the dog walking group liked the colours used in the leaflet. These users felt that it was quite comprehensive and also indicated that they would read all of the text within it. They also felt marking where the train stations are was useful.

However, non-dog walkers felt that there was no need to have a slogan on the leaflet and that a picture of the path would be enough. They also felt that using the word 'long' could be off-putting as there are other aspects of the path that could be highlighted and the path tends to be walked in sections so there is no virtue in emphasising its length:

“You don't walk it 'cause it's long” “...sounds a bit arduous”

Respondents generally thought that it would add to the leaflet if the locations featured and shown in photographs were more easily identifiable and played to the strengths of the path i.e. its scenery, wildlife and views.

Respondents in the Anstruther group also felt that there was an opportunity to sell merchandise that was more relevant to the path such as calendars and postcards containing images of the path and local scenery. They felt that the current merchandise was more aimed at tourists and not particularly appropriate for the path. Respondents in this group indicated that they would be more likely to look at the map than to spend time reading the text. They felt that this was useful but along with dog walking users, felt that it would benefit from a key showing people where the toilets are.

Respondents in the Anstruther group were not particularly impressed with the Guardian membership scheme. They felt that it was “*a bit gimmicky*” and that the fee was “*a bit expensive for what it is*”. The respondents who were members of a walking group felt that they kept an eye on the path better than anyone and did not need to be a member of the scheme to do so. This group felt that the newsletter provided to members of the scheme should include details of how their money was being used. Respondents in the dog walkers group felt the membership of other schemes such as the National Trust gave members a number of benefits, whereas the Coastal Path

Guardianship Programme does not seem to offer much to its members. This group also felt that it was not clear what the money was being used for.

Respondents in the Anstruther group felt that the leaflet was well worth FCCT producing, however, they felt that it would benefit from more local information, for example, a guide of events that are going on throughout the year. Dog walking users liked the fact that distances were printed on the map but felt that the path gradings used were “*a bit broad brush*”. All respondents felt that bus information should also feature on the map.

Non-users felt that there was too much information on the back and that the font was too small. A respondent in the non-dog walking group also commented that the FCCT address and phone number featured on the back is incorrect. Respondents in the dog walkers group also felt that the font was too small, particularly for the FCCT phone number.

Harbourmasters House leaflet

None of the non-users were aware of Harbourmasters House, however, the reaction to the leaflet was generally positive, as was the case amongst the dog walkers group. Respondents in this group felt that this leaflet had more information on it than the Coastal Path leaflet and liked that it was obvious that you could have something to eat or drink while you were there. The general consensus was that this leaflet would encourage them to visit. However, non-users felt that the leaflet focused too much on Dysart and the Harbourmasters House itself and did not give much information about the adjacent Coastal Path.

Respondents in the Anstruther group were less impressed with this leaflet. They would have liked to see real scenes and images rather than the computer generated images used. They also felt that this leaflet did not have enough of a local feel – “*doesn't say 'Fife'*”. They felt that the leaflet did not come across as if it had been produced by a local and that local residents would not be encouraged to pick it up. They would like to see the inclusion of quotes about the area from locals and both user groups wanted to see more about the heritage of the area.

Respondents in the dog walking group felt that the leaflet should have a picture of Harbourmaster's House itself and that the leaflet should make more of the harbour and the surrounding area. This group also disliked the computer generated image

inside and felt that a second edition of the leaflet should be produced very soon so that *“it actually looks like the reality...of the attraction.”*

A respondent in the Anstruther group mentioned having read about the Coastie competition in the Fife Free Press. They were aware of the work being done to make sections of the path more suitable for children and felt that this was a very positive thing, although parents need to be encouraged to be active as well. It was suggested that schools could also take children for walks along the path. The majority of users, however, were unaware of Coastie.

5.5 Survey of the Scottish population

As part of this programme of research a series of questions were placed on the Scottish Opinion Survey (SOS). The SOS is consumer omnibus survey which is conducted on a monthly basis and each wave consists of at least 1,000 interviews with adults aged 16 years and over throughout Scotland. All interviews are carried out in respondents' homes by CAPI (Computer Assisted Personal Interviewing), allowing the use of prompt materials and show cards.

For this study, 1,007 interviews were conducted between 22nd and 27th February 2007 with the results presented in the following section. These have been weighted to be representative of the Scottish population.

Leisure visits

Visits to East and Central Scotland

Respondents were shown a list of leisure destinations throughout East and Central Scotland and asked which, if any, they had visited for leisure purposes during the previous twelve months.

Table 6-1– Places visited for leisure purposes (%)
Base: All respondents (1,007)

	%		%
Stirling	25	Cramond Village/Island, Edinburgh	7
Perth	24	Falkland Palace, Fife	6
St. Andrews, Fife	23	Loch Leven Nature Reserve, Kinross	6
Dundee	20	Pentland Hills Regional Park, Midlothian	5
Queensferry/the Forth Bridges	20	Speyside Way	5
Falkirk Wheel	16	Tentsmuir, Fife	5
Dunfermline	12	Great Glen Way	4
Union Canal/Forth & Clyde Canal	12	Seabird Centre, East Lothian	4
East Neuk of Fife	10	Glentress Forest, Scottish Borders	3
Fife Coastal Path	9	John Muir Way, East Lothian	3
Water of Leith Walkway, Edinburgh	9	Lochore Meadows Countryside Park, Fife	2
West Highland Way	9	Southern Upland Way	2
Lomond Hills Regional Park, Fife	8	None	36

As shown in Table 6-1 above, amongst the total sample, the places most frequently visited for leisure purposes were the towns and cities listed - Stirling (25%), Perth (24%), St Andrews (23%) and Dundee (20%). Around one in ten respondents stated

that they had visited the Fife Coastal Path for leisure purposes in the twelve months prior to being interviewed (9%). Applying this proportion to the Scottish adult population as a whole, equates to around 370,000 individuals.

Variations in the locations visited can be seen when analysed by age, social class and region of residence. Respondents between the ages of 35 and 44 were more likely than those aged 65 or over to have visited Stirling for leisure purposes within the past year (31% and 20% respectively), while respondents from the North of Scotland were less likely than those in the East/South or the West of the country to have done so (16% v 28% and 27% respectively). Conversely, respondents living in the West of Scotland were least likely to have visited Perth (17% v 25% East/South and 33% North), with this destination also more likely to be visited by those in the AB and C1 social classes (30% and 29% respectively) than by those in the DE socio-economic grouping (16%).

Respondents who had visited St. Andrews were also most likely to be in the AB and C1 social classes (30% and 28% respectively) but less likely to be from the West of Scotland (18%). Dundee was most likely to have been visited by those between the ages of 16 and 24 (31%) and those living in the North of Scotland (36%), while Queensferry and the Forth bridges were most likely to have been visited by males (23%), those aged 35-44 (33%), ABs and C2s (26% each) and those living in the East and South of Scotland (26%). It is worth bearing in mind that the latter is a route used by a number of commuters travelling in and out of Edinburgh, which may contribute to the high proportions stating that they had visited this location.

Variations in the types of users visiting the Fife Coastal Path were also evident, with 13% of those between the ages of 45 and 54 having visited the path within the past 12 months for a leisure visit compared to only 6% of those over the age of 65. 14% of those in the ABC1 social classes had used the path at least once within the last 12 months, compared to 5% of C2DEs. Visitors to the path were most likely to come from Eastern and Southern areas of Scotland, with 14% of respondents living less than an hour from Fife having visited the path compared to only 3% of those living more than 2 hours away.

Those most likely not to have visited any of the sites listed included respondents between the ages of 16 and 24 (44%), those over the age of 65 (47%), DEs (53%) and respondents living in the West of Scotland (46%).

Visits to Fife

Two-fifths of those interviewed indicated that they visited Fife within the past 12 months for any purpose (41%). 25% had been for a leisure day trip of more than 3 hours away from home, while one in ten had been on a leisure trip of less than 3 hours away from home (10%). 11% had been on a holiday or short break to the area, with small proportions having been on a trip for business purposes.

Table 6-2– Trips to Fife within last 12 months (%)
Base: All respondents (1,007)

	%
Holiday (4+ nights spent away from home)	3
Short break (1-3 nights away from home)	8
Day out for leisure purposes (>3hrs away from home)	25
Leisure trips (<3hrs away from home)	10
Overnight business visit	1
Business visit (no overnight stay)	3
Business visit extended for leisure purposes	1
Visited Fife for any reason	41
Not visited Fife	59

Respondents in the AB social classes were more likely than those in the DE social classes to have visited Fife on a day trip of more than 3 hours in duration (31% and 18% respectively). Those living in the East or South of Scotland and those living in the North were also more likely than those living in the West to have done so (36% and 26% v 17%). 34% of those who had visited the Fife Coastal Path within the last year stated that they had visited the Fife area on a day trip of less than 3 hours from home. 22% of those living in the East or South of Scotland and the 46% of those living less than a hour away from Fife who had been to the area on this type of trip.

The respondents most likely to have visited Fife for a holiday of 4 nights or more within the last year were those aged 55 to 64 (5%). Respondents in the AB social classes were more likely than DEs to have visited on a short break of 1-3 nights in duration (11% v 5%), as were those with children in the household (12%). 32% of those who had visited the Fife Coastal Path had also been to the are on this type of trip.

The respondents who were *least* likely to have visited Fife within the last year were those living more than 2 hours away from the Fife area (14%), those in the DE social classes (27%), those living in the West of Scotland (29%) and 16-24 year olds (30%). 38% of women surveyed had visited Fife within the last year compared to 45% for those men surveyed. 28% of those who stated that they were interested in visiting the Fife Coastal Path in the next few years had not visited the area in the previous twelve months.

Future visit intentions

To East and Central Scotland

Respondents were also asked to select, from the same list of destinations in East and Central Scotland, which, if any, they would be interested in visiting in the next year or so.

Table 6-3 – Future visits within Scotland (%)

Base: All respondents (1,007)

	%		%
Falkirk Wheel	25	Water of Leith Walkway, Edinburgh	7
St. Andrews, Fife	23	Cramond Village/Island, Edinburgh	7
West Highland Way	16	Speyside Way	6
Stirling	14	Falkland Palace, Fife	5
Perth	11	Pentland Hills Regional Park, Midlothian	5
Loch Leven Nature Reserve, Kinross	11	Tentsmuir, Fife	5
Lomond Hills Regional Park, Fife	10	Great Glen Way	5
Fife Coastal Path	9	Glentress Forest, Scottish Borders	5
Queensferry/the Forth Bridges	8	Dunfermline	4
Union Canal/Forth & Clyde Canal	8	Lochore Meadows Countryside Park, Fife	4
East Neuk of Fife	8	John Muir Way, East Lothian	3
Seabird Centre, East Lothian	8	Southern Upland Way	2
Dundee	7	None	29

The Falkirk Wheel was the attraction that the highest proportion of respondents stated that they would be interested in visiting (25%). St. Andrews was of interest to 23% of respondents, followed by the West Highland Way (23%) and Stirling (14%). 9% of respondents indicated an interest in visiting the Fife Coastal Path within the next few years.

Respondents between the ages of 25 and 34 were most likely to indicate an interest in visiting the Falkirk Wheel within the next few years, particularly compared to those aged 65 and over (31% and 19% respectively). Respondents with children in their household were also more likely than those without children in the household to be interested in visiting this attraction (30% v 22%), as were those living in the West of Scotland (28%).

Those most interested in visiting St. Andrews in the next few years included respondents between the ages of 55 and 64 (30%), those in the AB social classes (30%) and those living in the North of Scotland (28%). 35-44 year olds (23%) and those in the AB social classes (22%) were most likely to be interested in visiting the West Highland Way, while those aged 35-44 (17%) and those living in the North of Scotland (18%) were most likely to be interested in visiting Stirling.

Almost two-fifths of those who had visited the Fife Coastal Path within the previous 12 months indicated that they would be interested in visiting again within the next few years (38%). 45-54 year olds were the age group most likely to indicate interest in visiting the path, particularly compared to those over the age of 65 (4%), as were those in the AB social classes compared to DEs (14% v 7%).

46% of respondents over the age of 65 indicated that they would not be interested in visiting any of the locations or attractions listed in Table B-2. Slightly over a third of those in the DE social classes also indicated that this was the case (36%), as did 34% of those with no children in the household.

To Fife Coastal Path

Respondents were also asked to rate their intention to visit the Fife Coastal Path within the next 12 months.

Table 6-4 – Likelihood to visit Fife Coastal Path with the next 12 months or so (%)
 Base: All respondents (1,007)

	%
Very likely	10
Quite likely	23
Not very likely	26
Not at all likely	39
Don't know	2

23% of respondents indicated that they were 'quite' likely to visit the Fife Coastal Path within the next year or so, while a further 10% indicated that they were 'very' likely to do so. 44% of respondents living in the East or South of Scotland indicated that they were 'very' or 'quite' likely to visit the path, as did 39% of those in the C1 socio-economic grouping and 46% of those who had visited the path within the past twelve months. 37% of those with children in their household indicated that they were likely to visit the path in future compared to 30% of those with no children in the household. Just under half of those living less than an hour from Fife (48%) stated that they were 'very' or 'quite' likely to use the path.

Conversely, almost two-thirds of respondents stated that they were 'not very' or 'not at all' likely to explore the Fife Coastal Path within the next year or so. Respondents over the age of 65 (57%), those living more than 2 hours from Fife (56%), those in the DE social classes (49%), those living in the West of Scotland (43%), those aged 55-64 (43%), those with no children in the household (41%) and 16-24 year olds (38%) were the groups with the highest proportion stating that they were 'not at all' likely to visit the path within the next year or so.

In order to gain a greater understanding of motivations and barriers to visiting the Fife Coastal Path, respondents were asked what, if anything, would encourage them to visit the path in the next year or so.

Table 6-5 – Potential motivators (%)
Base: All respondents (1,007)

	%
More information about the path	13
More information about how to get to Fife generally	11
Access to the path for prams, pushchairs, wheelchairs etc.	11
Provision of a challenging, fairly remote walking route	10
More information about things to do in Fife	8
Better quality places to stay overnight	8
Lower priced overnight accommodation in the area	8
More information about Fife generally	7
Availability of parking close to the path	6
More things to do in the area for adults	6
More things to do in the area for children	6
Provisions of circular walking routes	6
Would go if family/friends took me	6
A good choice of places to eat out near the path	4
Direct public transport connections to the path	4
Provision of a surfaced, easy walking route	3
Nothing	42

Variations in the aspects which might encourage visits to the path included:

- *More information about the path* – most likely to be mentioned by respondents in the AB and C1 social classes (16% and 18% respectively) but less likely to be mentioned by those over the age of 65 (5%) than amongst any other age group.
- *More information about how to get to Fife generally* – most likely to be mentioned as a potential motivator by those in the AB socio-economic grouping (12%) but again, less likely to be mentioned by those over the age of 65 (3%).
- *Access to the path for prams, pushchairs, wheelchairs etc.* – this was most likely to be of interest to those in the 25-34 age group, particularly when compared to those aged 16-34 (10% v 3%) and those with children in the household (9%).
- *Provision of a challenging, fairly remote walking route* – this was most likely to be of interest to those between the ages of 35 and 44 (5%).

The respondents most likely to state that nothing would make them more likely to visit the Fife Coastal Path within the next year or so were those over the age of 65

(55%), those in the DE social classes (49%), those living in the West of Scotland (46%) and those with no children in the household (45%).

Information Sources

Respondents who stated that more information about the path would make them more likely to visit were then asked to specify how they would like to receive this information.

Table 6-6– Preferred information sources (%)

Base: All for whom more information was a motivation to visit (258)

	%
Website	36
Leaflets	35
Tourist Brochures	30
Television Adverts	26
Adverts in local press	21
Television programmes	18
E-mail	16
Guidebooks	16
Post	15
Articles in local press	15
Articles in national press	11
Articles in walking magazines	6

Overall, the most popular information source was the Internet, with 36% of respondents stating that they would like information via a website. This option was more likely to be selected by those in the AB and C1 social classes (46% and 41% respectively), while 43% of respondents living 1-2 hours from Fife mentioned this information source.

Three in ten respondents mentioned tourist brochures (30%), with this option more likely to be selected by respondents with no children in the household (35%). There was little variation in the proportions mentioning television adverts, an information source selected by 26% of respondents answering this question.

5.6 Survey of local businesses

The study attempted to assess not only the views of path users, but also those of local businesses based close to the path. Research efforts were built around an e-survey of businesses along the path route and a workshop with interested local businesses.

The e-survey went out to around 600 businesses and 73 responded, a response rate of around 13%. The invitation to participate in the workshop was passed to a similar number of businesses.

From the response to these research efforts we would conclude that there is a small core of activist business-owners who are ready to respond to or create business opportunities relating to the path, and a larger group of businesses who have an interest in the development of the path, but are likely to take a more passive approach.

In this section we present the following findings:

- an overview of the contacts with businesses
- the results of the electronic survey
- conclusions on developing the business potential of the path

Overview of results

The e-survey results showed a good level of awareness of the path among respondents, and a positive view of the contribution it makes to Fife's tourism offering.

The relevance of the path to individual business operations varies, but among survey respondents, there is a high level of interest in capitalising on the path. Respondents also usefully highlight particular constraints to developing their business in relation to the path, the most commonly encountered one being information.

Respondents generally appear to have an interest in drawing on the development of the path to develop both existing business opportunities and to expand into new markets made possible by the Fife Coastal Path, however much of this is focused around marketing existing business offerings.

Attendees at the workshop were similarly interested in the development of the path. It is worth observing that business owners have frequently lived in the area for many years and are path users themselves. They therefore have an affection for and an interest in the path and the coastline in general.

Role of the path

Awareness of the Fife Coastal Path

Table 7-2 Were you aware of the Fife Coastal Path prior to this survey?

Category	Number of respondents	Percentage of respondents
Not aware of it	3	4%
Aware that it exists, but not of the full extent or route	17	23%
Aware that it exists and of the extent and route	53	71%

Source: SQW e-survey of Fife coastal businesses

Most businesses had good levels of awareness of the path, with only 3 respondents reporting that they were not aware of it. The majority of respondents were aware of both its existence and its route (71%).

A smaller group of respondents (23%) were aware of the path but not of its full extent/route and these may represent an opportunity in the wider business population for education and communication.

Longer term impact of Path

Table 7-3 In the longer term, what effect do you think the presence of the Fife Coastal Path will have on your business?

Category	Number of respondents	Percentage of respondents
Major positive effect	16	22
Minor positive effect	49	67
No effect	8	11
Minor negative effect	-	-
Major negative effect	-	-

Source: SQW e-survey of Fife coastal businesses

The majority of respondents (65) in the sample consider the path to have had a positive effect on their business. Of these, 49 respondents considered it had a minor positive effect and 16 a major positive effect. Only 8 respondents thought the path

had had no effect on their business. No respondents thought the path had a negative effect on their business.

Impact of Path closure

Table 5-4 If the Fife Coastal Path were to close for a period of time (e.g. due to avian flu or pollution), what effect do you think it would have on your business?

	Major increase	Minor increase	No effect	Minor decrease	Major decrease
Sales	0% (0)	0% (0)	52% (38)	44% (32)	4% (3)
Costs	0% (0)	7% (4)	87% (53)	7% (4)	0% (0)

Source: SQW e-survey of Fife coastal businesses

The importance of the path to local businesses was tested by asking respondents what impact the temporary closure of the path would have on their trade.

Notably the majority thought there would be no impact on sales or costs. A substantial minority (44%) thought a closure of the path would have a negative impact on sales, while a small minority (4%) thought this would be a major negative impact.

The anticipated lower impact of a closure on costs can probably be explained by the predominance of accommodation businesses in the sample where costs are largely fixed.

Given the significance of the path to tourism, as illustrated in the user survey, this attitude seems unduly sanguine.

Business benefits of the path

The Fife Coastal Path in respondent's marketing

Table 5-5 Do you use the Fife Coastal Path in any of your publicity material?

Category	Number of respondents	Percentage of respondents
No	35	54%
Yes	30	46%

Source: SQW e-survey of Fife coastal businesses

A substantial minority (46%) of respondents used the path in their publicity material, but there was a large cohort of respondents who did not link their business to the path or the benefits that it offered to visitors.

Websites were the main medium by which customers were informed about the path. Other media were used far less often.

Table 7-5 Publicity material produced by respondents featuring the Fife Coastal Path

Website – 18 respondents
Brochure – 5 respondents
Other – 4 respondents
Print advertising – 1 respondent
Face to face – 1 respondent

Source: SQW e-survey of Fife coastal businesses

Again, given the importance of the path to visitors to Fife identified in the main study, businesses who do not include the path in their marketing efforts may not be presenting themselves to best advantage to potential customers.

Involvement in walking-related initiatives

Table 5-6 Are you involved in any initiatives associated with the coastal path, such as the "Walkers Welcome"?

Category	Number of respondents	Percentage of respondents
No	55	85%
Yes	10	15%

Source: SQW e-survey of Fife coastal businesses

Only 10 respondents in the sample reported being involved with initiatives linked to the path. The majority of these (8 respondents) were involved with Walkers Welcome. Two respondents were involved with local walking initiatives.

In discussions with business owners, it was reported that the Walkers Welcome initiative was restricted to accommodation businesses, and only to those which were quality assured by VisitScotland. There were also issues in meeting the Walkers Welcome criteria, such as having drying facilities for boots and clothes.

There may potentially be the opportunity to increase awareness and involvement with the Walkers Welcome initiative should businesses be interested in that market segment. However, business owners also suggested developing the scheme. This is discussed in the Developing the Path section below.

Business opportunities from the Path

Table 5-7 Do you foresee any potential business opportunities (either for yourself or other local companies) arising from the Fife Coastal Path in the future?

Category	Number of respondents	Percentage of respondents
No	25	40%
Yes	39	60%

Source: SQW e-survey of Fife coastal businesses

The majority of respondents (60%) foresaw potential business opportunities arising from the path, either for their own businesses or for other operators.

These opportunities included:

Table 7-8 Business opportunities arising from the Path

Own business	Other businesses
<ul style="list-style-type: none"> greater revenue from walkers as Path usage increases – particularly accommodation and meals. involvement with initiatives such as Walkers Welcome better marketing of area advertising revenues from suppliers to Path walkers 	<ul style="list-style-type: none"> sales of maps, books, and postcards relating to the Path civil engineering works lodges and campsites along route guided walks transport of walkers' baggage from point to point visual art and craft goods massage, aqua therapy, reflexology

The business opportunities identified varied from a basic increase in the consumption of hospitality services as walker numbers increased to more sophisticated servicing of this market segment – including products and services specifically aimed at walkers.

Constraints to developing business in relation to the Path

Table 5-9 If you perceive opportunities for developing your business in relation to the Path, are there any particular constraints in doing this?

Category	Number of respondents	Percentage of respondents
Lack of information about the Path	10	24%
Proximity to path	6	14%
Seasonality	5	12%
Visitor patterns	5	12%
Investment	5	12%
Marketing of business	4	10%
Weather	3	7%
Transport	0	0%
Competition	0	0%
Staffing	0	0%
Other	4	10%

Source: SQW e-survey of Fife coastal businesses

The major constraint identified by respondents to developing their business in relation to the path was a lack of information about the path (24% of respondents), followed by proximity to the path (14%). Seasonality, visitor patterns and investment were identified as constraints by 12% of respondents, and marketing by 10% of respondents. Only 7% of respondents identified the weather as a constraint to developing their business in relation to the Path.

Other constraints identified by respondents were: a lack of signage leading from the path to a shop; maintenance of the Path; and the need to be able to provide drying facilities in order to participate in the Walkers Welcome initiative.

The need for greater information on the path was explored with the workshop participants. Their view was that the printed material available on the path was already excellent, but its impact was reduced by its distribution. FCCT's leaflets, along with other tourism information leaflets, were no longer delivered to businesses but had to be picked up in business hours from the Trust or from Tourism Information Centres, which wasn't always possible for the owners and managers. This issue wasn't restricted to FCCT leaflets, and it is possible some kind of joint working could be arranged with the Tourism Information Centres.

Proximity to the path is less easily addressed, although some businesses suggest signposting from the path to local services, and the production of maps and brochures giving the locations of relevant businesses may boost trade from walkers. It was encouraging that issues of seasonality or weather were not considered a major factor by businesses, and transport and staffing were not issues for any of the respondents.

Increasing the benefits for local businesses from the Fife Coastal Path in the future

In terms of increasing the benefits for local businesses in the future, there were a number of suggestions:

Table 7-10 Suggestions for increasing the business benefits of the Path

Improvements in marketing	Other suggestions
<ul style="list-style-type: none"> • use of day-long events to highlight existence of Path • better signs and leaflets • joint initiatives • central marketing with links to accommodation providers • discussion of opportunities with providers • links from websites and window stickers • booklet/map with all tearooms, accommodation, attractions, shops along the route. Should include public toilets and bus stops/rail links; • national and international promotion. 	<ul style="list-style-type: none"> • emailing local businesses to make them aware of the potential new business • address the less good sections of the Path around Levenmouth • more proactive approach by accommodation providers to offer packages geared to long-distance walkers • better entry/exit points at towns and villages along the route, along with signage advertising local attractions • improved maintenance of the Path (Boarhills to Craig; route through Buckhaven and Methil cited) • construction of a cycle path alongside the Path making it accessible to a greater number of people, and increasing usage and demand. • more dog bins en-route (dog fouling cited as a particular problem on Aberdour to Burntisland section) • extending the Path to Perth • improved public transport • 48 hour walk/run event along Path

Marketing was the most commonly suggested action, but there was also a range of other actions suggested – including many linked to improving various aspects of the physical infrastructure of the path.

A number of these issues were explored with the workshop participants, and their suggestions are treated at greater length in the Developing the Path section.

Respondents' customer base

We asked respondents to estimate, as best as they were able, the extent to which their customers were making use of the path and the characteristics of these path users as distinct from other customer groups.

Regular and repeat customers

Table 7-11 Percentages of customers who are regular visitors/repeat customers

Category	Number of respondents
1% to 20%	21
21% to 40%	9
41% to 60%	9
61% to 80%	12
81% to 100%	2

Source: SQW e-survey of Fife coastal businesses

The majority of respondents thought their customers tended to be one-off, rather than regular or repeat visitors. There is, however, a substantial minority of respondents who considered that their customer base was predominantly made up of regular customers.

Path usage by customers

Table 7-12 What proportion of your customer base do you think are Path Users?

Category	Number of respondents	Percentage of respondents
0%	2	4%
1-20%	33	70%
21-40%	4	8%
41-60%	3	6%
61-80%	3	6%
81-100%	2	4%
Total	47	100%

Source: SQW e-survey of Fife coastal businesses

Only a very small number of respondents thought that none of their customers made use of the path.

The majority of respondents thought between 1% and 20% of their customers made some use of the path.

Higher levels of reported path usage were rarer among respondents, only some 10% of respondents estimated that levels of Path usage among customers exceeded 60%. The very highest levels were associated with a select number of accommodation businesses.

When compared with the findings of the visitor survey, it is evident that respondents underestimate the use made of the path by visitors.

Spending patterns of Path users

Table 5-13 Are there any particular patterns associated with these different groups, in terms of how much is spent or what is purchased?

no differences – 15 respondents
seasonal (busy in summer, less busy autumn/spring, quieter in winter) – 12 respondents
characterised by one-night stays – 5 respondents
appeals to day visitors – 2 respondents
lower spend – 2 respondents
greater spending on food and drink – 2 respondents
high spending – 1 respondent
last minute booking – 1 respondent
weather dependent – 1 respondent

A substantial minority of respondents considered that there was no difference in spending patterns between path users and non-path users. However, other respondents identified a range of differences between the two classes of customer. The most commonly cited characteristic of path users was that they were more seasonal than other customer groups, with a peak in summer, a lower presence in the shoulder seasons and quiet in winter. However, this pattern also matches the general tourist consumption behaviour.

Another characteristic cited by multiple respondents was a tendency to prefer one-night stays. This makes sense for those visitors using the path as a long-distance walk, and such consumption patterns may have implications for promoting the Path as a long-distance route if the accommodation base is geared to week-long or week-end provision.

Other characteristics of path users cited varied quite widely, with some respondents considering that path users were higher spending than non-users, others taking the opposite view. The data from the visitor survey will now be available to the business

owners, giving a clearer picture of path users, their levels of spend, and the services they consume.

Seasonality

Table 5-14 Is your business affected by seasonality? If so, in what way?

Category	Number of respondents	Percentage of respondents
Yes	38	86%
No	6	14%

Source: SQW e-survey of Fife coastal businesses

The majority of respondents thought their business was affected by seasonality. Seasonality was characterised by peak demand coming in the summer months, with the holiday season running from around Easter to October, and with winter (with the exception of Christmas) being quiet.

The other, related, aspect of seasonality cited was weather, with visitors, especially foreign visitors reluctant to visit in months with poor weather.

Developing the business in the future

Twenty-nine respondents had defined objectives for developing their business. These included:

Table 5-15 Business development objectives

- More/better marketing of existing business – 7 respondents
- Improving facilities/services – 6 respondents
- Increasing occupancy rates – 4 respondents
- Increasing the scale of operations – 3 respondents
- Market development – 2 respondents
- Extending season – 2 respondents
- Reducing administrative overheads – 1 respondent
- Increasing repeat business – 1 respondent
- Enhancing the coastal area – 1 respondent
- Promoting short breaks – 1 respondent
- Promoting cycle tours – 1 respondent
- Promoting fitness related tourism – 1 respondent
- Extending product range for walkers – 1 respondent
- Upgrading rating – 1 respondent

Business development objectives were mostly focused on upgrading existing operations – through a combination of better marketing, and improved facilities and services.

Extending business operations into new markets was cited by only a few respondents. These included more short-breaks, developing a longer season, developing cycle-tourism, fitness-related tourism, and stocking products targeted at walkers.

Current use of the business support network

Table 5-16 Do you currently use the business support network?

Category	Number of respondents	Percentage of respondents
Yes	7	13%
No	40	76%
Don't know	6	12%

Source: SQW e-survey of Fife coastal businesses

The majority of respondents do not currently make use of the business support network. Only a small minority of respondents were unclear about the local business support network – to the extent that they were unsure as to whether or not they were users

Future use of the business support network

Table 5-17 Are you likely to seek support in the future from the business support network?

Category	Number of respondents	Percentage of respondents
No	19	37%
Don't know	30	58%
Yes	3	6%

Source: SQW e-survey of Fife coastal businesses

When asked whether they would be likely to seek support from the business support network in future, the largest group of respondents (58%) were unsure, suggesting an openness to engaging with the business support network should there be a reason or opportunity to do so.

Of the small number of respondents who said they would be likely to seek support in the future, the interest was in advice, training, marketing and business development.

In face to face discussions with business owners, there was no particular drive to draw upon the business support network – business owners who attended had established businesses and substantial business experience.

Respondent characteristics

Business sectors

Table 5-18 Which of the following best describes your business activities?

Category	Number of respondents	Percentage of respondents
Accommodation	46	81%
Food and drink	1	2%
Retail	2	4%
Visitor attraction	2	4%
Transport	1	2%
Other (please specify)	5	9%

Source: SQW e-survey of Fife coastal businesses

The majority of respondents to the e-survey were accommodation businesses. These formed the largest group of respondents to be contacted, but the level of returns is still higher than for their representation in the sample as a whole. This tends to suggest that it is the accommodation businesses who perceive the path as being most relevant to their operations.

The low level of visitor attractions replying to the survey is surprising, as these were readily identified and it could be assumed would be of a size to have the capacity to respond to the survey. This may suggest that they currently perceive the path and its users to be of less relevance their operations. “Other” included civil engineering and arts development organisations.

Business locations

Table 5-19 Does the business operate from...?

Location	Number of respondents	Percentage of respondents
... a single location?	48	87%
... multiple locations in Fife?	5	9%
... multiple locations in the UK?	2	4%

Source: SQW e-survey of Fife coastal businesses

The overwhelming majority of business respondents operated from only one site. A small number operated from more than one site in Fife or from multiple locations in the UK.

Number of employees

Table 5-20 How many employees does your business have at this location?

Employment band	Number of respondents	Percentage of respondents
1 to 9 employees	40	85%
10 to 49 employees	3	6%
50 to 249 employees	4	8%
250+ employees	0	0%

Source: SQW e-survey of Fife coastal businesses

The majority of respondents fell into the micro-business category (0-10 employees), with 85% of respondents in this category. Two smaller groups – 6% and 8% respectively - of respondents were in the small business and medium-sized business categories. There were no respondents from large businesses.

Valuing the path

The e-survey goes some way to providing an insight into the views of the business base in the area surrounding the Fife Coastal Path and its relationship with the Path.

The path is clearly valued by those businesses who responded to the e-survey. No respondent considered that it had a negative effect on their business, and a majority considered that it had a positive effect – either a minor positive effect (67%) or a major positive effect (22%).

When asked about the impact of any temporary closure of the Path, a substantial minority (44%) of respondents thought that there would be a negative impact on sales, while a smaller number (4%) thought this would be a major negative impact. The majority of respondents are therefore not primarily dependent on the path for custom but draw on it as one source of custom.

The path is clearly of importance to tourism businesses along the coast. For a minority of businesses it supports a large part of their business activity, but for most it is perceived to form an important component of the area's tourism offering.

Perceptions of path users

The majority of respondents thought their customers tended to be one-off, rather than regular or repeat visitors, but there was a substantial minority of respondents who

considered that their customer base was predominantly made up of regular customers.

Only a very small number of respondents thought that none of their customers made use of the path, while the majority of respondents thought between 1% and 20% of their customers made some use of the path.

Higher levels of reported path usage were reported among some respondents, some 25% of respondents reported path usage among customers higher than 50%, and up to 90% in some cases. The very highest levels were associated with a select number of accommodation businesses.

A substantial minority of respondents considered that there was no difference in spending patterns between path users and non-path users. However, other respondents identified a range of differences between the two classes of customer with the most commonly cited characteristic of Path users was that they were more seasonal than other customer groups, with a peak in summer, a lower presence in the shoulder seasons and quiet in winter.

Another characteristic cited by multiple respondents was a tendency to prefer one-night stays. These consumption patterns may have implications for promoting the Path as a long-distance route if the accommodation base is geared to week-long or week-end provision, rather than short stays as on the West Highland Way.

There was less agreement about other characteristics of path users among businesses, with some considering them high-spending or greater consumption of food and drink while others disagreed.

Path usage is clearly an important part of coastal tourism businesses operations, although the perceived level of usage varies. The results of the visitor survey will provide local businesses with a more accurate representation of the importance of the path

Business respondents considered path users to be more influenced by seasonality, and to have a predisposition to one-night stays. Otherwise, there was no clear view on the characteristics of path users, in terms of numbers, size of group, composition or spend. Again the results of the visitor survey will help inform the business base.

The results of the user survey are therefore likely to be of interest to relevant businesses located along the path, particularly if consumer preferences can be established from the data, and customer offerings developed.

Developing the business potential of the Path

The majority of respondents to the e-survey (60%) foresaw potential business opportunities arising from the path, either for their own businesses or for other operators. The business opportunities identified varied from a basic increase in the consumption of hospitality services as walker numbers increased to more sophisticated servicing of this market segment – including products and services specifically aimed at walkers. This is an encouraging finding for the partners, should the respondents be representative of the wider business population, as it suggests a willingness to engage with the development of the path.

Through discussions with local businesses, we were able to explore these ideas further. We have divided these into two areas: public initiatives, where action is best carried out by the public sector; and private initiatives, where action is best carried out by businesses, or a collection of businesses, themselves.

Public initiatives

Information

The sample had generally good levels of awareness of the path, with the majority of respondents aware of both its existence and its route. Nevertheless, a minority of respondents (23%) were aware of the path but not of its full extent/route and these may represent an opportunity for the Partners to educate the wider business population about the path.

The major constraint identified by respondents in developing their business in relation to the path was a lack of information about the path (24% of respondents). As noted above, the main weakness is distribution of existing literature – which is considered excellent – to businesses. Consideration should be given to making Path literature available to businesses through deliveries to business premises, providing for bulk pickups from Tourist Information Centres or other locations such as Council buildings, or posting literature to businesses at the start of the season.

Signposting

A more significant constraint to developing the business potential of the path was the signposting of facilities. This was identified by 14% of respondents to the e-survey, and was also highlighted by workshop participants.

This issue is less easily addressed, although some businesses in the survey suggested physical signposting from the path to local services, as well as the production of maps and brochures for walkers giving the locations of relevant businesses along the path. Aspirations for this kind of signposting varied from generic symbols for different types of services to noticeboards with detailed information on business offerings. Signposting was suggested both for the entrances to villages – where it would give an indication of what visitors might find - and for those exiting villages where it would tell them where the next set of services might be found.

More ambitious approaches were also considered by businesses, such as touchscreens, which could also be used to give extra interest to the path.

Access

A number of businesses suggested making the path more usable along its length by cyclists, considering that this would open the path up to a new group of users. However this idea was opposed by just as many business owners who considered that cycle and pedestrian traffic would not mix well, and the physical upgrades needed would diminish the wilder parts of the path which formed part of its attractiveness. One possible suggestion for squaring this circle was cycle routes that made part use of the path and at other times took cyclists back onto other routes.

More generally, there was a desire for improved access at different points, particularly for wheelchairs and prams, where the path was suitable for their passage. The issue here was reportedly the illegal use of the path by motorcycles which was prevented by barriers that also served to block wheelchairs and prams. There appeared to be no simple solution to this problem.

There was also a desire from participants for the path to develop links with the core paths network in the path hinterland. This would give more scope for circular walks and routes leading to particular places of historic or natural interest that may lie a little way off the path proper.

Physical improvements

More ambitious facilities, such as toilets and food and drink facilities en-route were also suggested, as were heritage centres along the route to highlight points of interest and encourage people to step off the path to visit the surrounding villages. It was recognised that these came with a high cost.

Private initiatives

Marketing

A substantial minority (46%) of respondents in the e-survey used the path in their publicity material, but there was a large cohort of respondents who did not currently link their business to the path or the benefits that it offered to visitors. As websites were the main medium by which customers were informed about the path it would be relatively inexpensive for other businesses to incorporate information about the path – partners could supply appropriate “bite-sized” information for this purpose.

From their own experience as tourists, business owners thought there was scope for the development of a local path website – in parallel with the path website – giving details of accommodation, food and drink and entertainment. The examples of such

localised websites in France were cited. With tourists increasingly planning trips on the web, a location that could immediately offer an attractive and comprehensive overview of what to do and where to stay was likely to win more business.

Another suggestion was for accommodation businesses to develop “accommodation chains” partnering with other businesses a day’s walk apart to offer an accommodation package to long-distance walkers.

New business offerings

From the e-survey, the bulk of local business base currently aspires to strengthen their existing operations, increasing customer usage and the quality of services, rather than expanding into new markets. A minority of respondents were looking to expand their operations into new markets, some of which were, or could be path-related, such as wider product ranges targeted at walkers, short-breaks, and cycle and fitness-related tourism. The potential for path-related offerings could be communicated to the business base once the results of the user survey are known.

There are already travel operators promoting the path as a long-distance walk. These include Easyways, Contour and Walking Support. These businesses book accommodation along the path for their customers and there may be potential for more businesses (e.g. attractions or food and drink) to tie in with them.

Other suggestions include developing themed or passport-type promotions to encourage visitors to travel to different parts of the path. There is already a Fife Beaches Passport scheme in operation which encourages tourists to visit each of the five Blue Flag beaches in Fife, and private sector variations on this theme are possible.

A broader “Walkers Welcome”

Only ten respondents in the e-survey reported being involved with initiatives linked to the path. The majority of these eight were involved with Walkers Welcome, and two with local walking initiatives. As described above, there were barriers to take-up as the Walkers Welcome initiative is limited to accommodation businesses, and only to those who are quality assured by VisitScotland.

There was a suggestion for a broader Walkers Welcome-type initiative for the path that would extend to a range of businesses, and give walkers the reassurance that a hotel, restaurant or café would welcome their trade and they would be assured of

hospitality. Membership of the scheme could be illustrated through stickers or signage, as well as other media such as leaflets or on websites.

It is possible that an initiative of this type could incorporate a scheme similar to Perth Council's Comfort Scheme, which compensates business owners for members of the public using their toilet facilities. Toilet provision has been one of the issues highlighted in the visitor survey, and this scheme may represent a relatively low-cost solution compared with building and manning public toilets.

A scheme such as this could be a low-cost yet highly visible way for businesses along the path to demonstrate their interest in the path as a source of customers and a willingness to meet their needs.

Joined up tourism

Whether businesses by themselves would be able to produce a path-length initiative such as a broader Walkers Welcome is an open question. At present, businesses tend to have a more local focus, the area that they know and serve, rather than the full-length of the path.

Business owners themselves recognised that there may be a need for public intervention, if only to act as a catalyst for private sector action. This could take the form of informal meetings at convenient times to promote networking and communication between businesses along the path. There would be logistical difficulties with this – the tourist business base splits between those operating 9 to 5-type hours and accommodation businesses who work early and late. To cater for both groups could require separate meetings.

Businesses were also keen to see FCCT staff on a more informal basis, with the business development office dropping in on businesses en route to discuss ideas and issues.

6. Appendices

Appendix 1 – Social class definitions

Appendix 2 – Survey questionnaires

Appendix 1 Social class definitions

- A**
- Scotland: 6% of the population;
 - These are professional people, or are very senior in business or commerce, or are top civil servants
 - Retired people, previously grade A, and their widows
- B**
- Scotland: 18% of the population;
 - Middle management executives in large organisations, with appropriate qualifications
 - Principle officers in local government and civil service
 - Top management or owners of small business concerns, educational and service establishments
 - Retired people, previously grade B, and their widows
- C1**
- Scotland: 21% of the population;
 - Junior management; owners of small establishments; and all others in non-manual positions
 - Jobs in this group have very varied responsibilities and educational needs
 - Retired people, previously grade C1 and their widows
- C2**
- Scotland: 24% of the population;
 - All skilled manual workers, and those manual workers with responsibility for other people
 - Retired people previously grade C2, with a pension from their job
 - Widows, if receiving pensions from their late husband's job
- D**
- Scotland: 16% of the population;
 - All semi skilled and unskilled manual workers, and apprentices and trainees to skilled workers
 - Retired people, previously grade D, with a pension from their job
 - Widows, if receiving a pension from their late husband's job
- E**
- Scotland: 13% of the population;
 - All those entirely dependent on the state long term, through sickness, unemployment, old age or other reasons. Those unemployed for a period exceeding 6 months (otherwise classified on previous occupation)
 - Casual workers and those without a regular income
 - Only households without a chief wage earner are coded in this group

Appendix 2 – Survey questionnaire



Fife Visitor Survey



Fife Coast and Countryside Trust would like to increase enjoyment of the Fife coast. Can you help out by completing this survey? This should only take about 10 minutes.

Please answer the questions regarding your visit to the Fife coastline by ticking the appropriate boxes or by writing in the spaces provided.

We would like to reassure you that all of your answers are completely confidential and your rights under the Data Protection Act, as well as the Market Research Society's Code of Conduct, will be fully observed, including your right not to answer or not to continue with the survey.

*After completing this questionnaire please return it to TNS Travel and Tourism, an independent market research company, using the FREEPOST envelope provided.
Thank you very much for your co-operation.*

OFFICE USE ONLY
(1-6) 145688 FV

(7-11) _____

(12) 1

Q1) During your trip to the pathway, were you on a short trip, a day out from home or staying away from home?

PLEASE TICK ONE BOX ONLY

- | | | | |
|--|--------------------------|--------|---------------------------------|
| On a short trip (of less than 3 hours) from home | <input type="checkbox"/> | 1 (68) | → Please skip to Q3a) |
| On a day out (for more than 3 hours) from home | <input type="checkbox"/> | 2 | → Please skip to Q3a) |
| Staying away from home | <input type="checkbox"/> | 3 | → Please answer Q2a), b) and c) |
| Other (please write below): | <input type="checkbox"/> | 4 | → Please skip to Q3a) |

Q2a) If you were on a trip AWAY FROM HOME when you visited the path (i.e. staying overnight), please specify which boxes apply:

- | | | |
|---|--------------------------|--------|
| I was taking a short break | <input type="checkbox"/> | 1 (70) |
| I was on a longer holiday (more than 4 days) | <input type="checkbox"/> | 2 |
| I was on holiday visiting friends and relatives | <input type="checkbox"/> | 3 |
| I was visiting friends and relatives for another reason | <input type="checkbox"/> | 4 |
| I was on business/working/conference | <input type="checkbox"/> | 5 |
| I am studying/educational | <input type="checkbox"/> | 6 |
| OTHER (please write below): | <input type="checkbox"/> | 7 |

Q2b) During your trip, how many nights away from home, if any, did you spend in the following locations?

PLEASE WRITE IN THE SPACES PROVIDED

- | | | |
|---|----------------------|----------------------|
| Nights away from home in total | <input type="text"/> | <input type="text"/> |
| | (71) | (72) |
| Nights within a mile of the coast of Fife | <input type="text"/> | <input type="text"/> |
| | (73) | (74) |
| Nights elsewhere in Fife | <input type="text"/> | <input type="text"/> |
| | (75) | (76) |
| Nights elsewhere in Scotland | <input type="text"/> | <input type="text"/> |
| | (77) | (78) |
| Elsewhere | <input type="text"/> | <input type="text"/> |
| | (79) | (80) |

Q2c) While you were in Fife, which of the following type(s) of accommodation, if any, did you use?

TICK ALL OF THE BOXES WHICH APPLY

- | | | | | | |
|----------------------------------|--------------------------|--------|--------------------------------|--------------------------|--------|
| Hotel/motel | <input type="checkbox"/> | 1 (13) | Touring caravan / motorhome | <input type="checkbox"/> | 9 |
| Guest house | <input type="checkbox"/> | 2 | Tent | <input type="checkbox"/> | x |
| Bed and Breakfast | <input type="checkbox"/> | 3 | Staying with friends/relatives | <input type="checkbox"/> | 1 (14) |
| Self-catering flat/house/cottage | <input type="checkbox"/> | 4 | University accommodation | <input type="checkbox"/> | 2 |
| Time share | <input type="checkbox"/> | 5 | Second home | <input type="checkbox"/> | 3 |
| Hostel/bunkhouse/bothy | <input type="checkbox"/> | 6 | None of these | <input type="checkbox"/> | 0 |
| Rented holiday/static caravan | <input type="checkbox"/> | 7 | | | |
| Owned holiday/static caravan | <input type="checkbox"/> | 8 | Other (please write below): | <input type="checkbox"/> | 4 |

OFFICE USE ONLY
(1-11) REPEAT

(12) 2

Q3a) Was this trip your first visit to the path?

Yes	<input type="checkbox"/>	1 (16)	→ Skip to Q4a
No	<input type="checkbox"/>	2	→ Please answer 3 b) and c)

Q3b) How often, on average, do you use the path in the summer months (April – September)?

PLEASE TICK ONE BOX ONLY

More than once per day	<input type="checkbox"/>	1(17)
Every day	<input type="checkbox"/>	2
More than once a week but not daily	<input type="checkbox"/>	3
Once a week	<input type="checkbox"/>	4
2 or 3 times a month	<input type="checkbox"/>	5
Once a month	<input type="checkbox"/>	6
Less often than once a month	<input type="checkbox"/>	7
Never	<input type="checkbox"/>	0

Q3c) How often, on average, do you use the path in the winter months (October – March)?

PLEASE TICK ONE BOX ONLY

More than one per day	<input type="checkbox"/>	1 (18)
Every day	<input type="checkbox"/>	2
More than once a week but not daily	<input type="checkbox"/>	3
Once a week	<input type="checkbox"/>	4
2 or 3 times a month	<input type="checkbox"/>	5
Once a month	<input type="checkbox"/>	6
Less often than once a month	<input type="checkbox"/>	7
Never	<input type="checkbox"/>	0

Q4a) Which activities did you take part in whilst using the path (on the day you received this questionnaire)?

TICK ALL OF THE BOXES WHICH APPLY

Walking with a dog	<input type="checkbox"/>	1 (19)	→ If you selected walking, cycling or running/jogging, please answer Q4b)	Motorsport	<input type="checkbox"/>	5
Walking without a dog	<input type="checkbox"/>	2		Canoeing	<input type="checkbox"/>	6
Cycling	<input type="checkbox"/>	3		Other water sports	<input type="checkbox"/>	7
Running/jogging	<input type="checkbox"/>	4		Picnic/Barbeque	<input type="checkbox"/>	8
Mountain biking	<input type="checkbox"/>	5		Visiting historic sites	<input type="checkbox"/>	9
Fishing	<input type="checkbox"/>	6		Visiting attractions	<input type="checkbox"/>	X
Horse riding/ pony trekking	<input type="checkbox"/>	7		Shopping	<input type="checkbox"/>	1 (21)
Nature/natural/cultural history	<input type="checkbox"/>	8		Eating out	<input type="checkbox"/>	2
Photography	<input type="checkbox"/>	9		Other(please write in below)	<input type="checkbox"/>	3
Birdwatching	<input type="checkbox"/>	X				
Golfing	<input type="checkbox"/>	Y				
Swimming or bathing	<input type="checkbox"/>	1 (20)		None	<input type="checkbox"/>	0
Windsurfing	<input type="checkbox"/>	2		Don't know	<input type="checkbox"/>	Y
Dinghy sailing	<input type="checkbox"/>	3				
Relaxing/sunbathing	<input type="checkbox"/>	4				

Q4b) If applicable, how far did you walk / jog / run / cycle?

Less than 1 mile	<input type="checkbox"/>	1 (22)
1-2 miles	<input type="checkbox"/>	2
3-5 miles	<input type="checkbox"/>	3
6-10 miles	<input type="checkbox"/>	4
10 and over	<input type="checkbox"/>	5
Don't know	<input type="checkbox"/>	y

Q5a) Are you aware that you were on a path which has a particular name?

Yes	<input type="checkbox"/>	1 (23)
No	<input type="checkbox"/>	2

Q5b) IF YES, can you write down the name of the path?

Q5c) Have you used any other long distance walks or paths in the UK?

Yes	<input type="checkbox"/>	1 (25)
No	<input type="checkbox"/>	2

Q5d) IF YES, can you write down the names of these long distance paths or walks?

Q5e) How would you rate the path compared to the other walks you have used?

Better than other walks	<input type="checkbox"/>	1 (26)
Worse than other walks	<input type="checkbox"/>	2
About the same as other walks	<input type="checkbox"/>	3
Don't know	<input type="checkbox"/>	x

Q5f) Why do you say that?

Q6) What would you have done if you had not visited the path on the day you received this questionnaire?

Stayed at home/gone to work	<input type="checkbox"/>	1 (31)
Visited/stayed in Fife	<input type="checkbox"/>	2
Visited/stayed in another part of Scotland	<input type="checkbox"/>	3
Visited/stayed somewhere else	<input type="checkbox"/>	4
Other (please write below):	<input type="checkbox"/>	5

Q7) How did you first find out about the path?

**Q8) Approximately how far did you travel to get to the path?
Please provide the one-way distance**

Less than 2 miles	<input type="checkbox"/>	1 (34)
2-5 miles	<input type="checkbox"/>	2
6-10 miles	<input type="checkbox"/>	3
11-20 miles	<input type="checkbox"/>	4
21-30 miles	<input type="checkbox"/>	5
31-40 miles	<input type="checkbox"/>	6
41-50 miles	<input type="checkbox"/>	7
51-60 miles	<input type="checkbox"/>	8
61-80 miles	<input type="checkbox"/>	9
81-100 miles	<input type="checkbox"/>	x
More than 100 miles	<input type="checkbox"/>	1 (35)
Don't know	<input type="checkbox"/>	y

Q9) Where did you travel from? i.e. where you live or where your holiday accommodation was. PLEASE WRITE IN THE NAME OF YOUR TOWN OR THE NEAREST TOWN:

Q10) Thinking about your visit to the path, how important was the path itself in your decision to take a trip there?

My sole reason for coming	<input type="checkbox"/>	1 (37)
My main reason for coming	<input type="checkbox"/>	2
One of several reasons for coming	<input type="checkbox"/>	3
Of no importance	<input type="checkbox"/>	4
Don't know	<input type="checkbox"/>	y

→ Please skip to Q12

Q11) What were your main reasons for visiting?

Q12) How did you travel to the path?

Car / van	<input type="checkbox"/>	1 (39)
Walked	<input type="checkbox"/>	2
Bicycle/ mountain bike	<input type="checkbox"/>	3
Private minibus / coach	<input type="checkbox"/>	4
Public bus	<input type="checkbox"/>	5
Train	<input type="checkbox"/>	6
Motorcycle	<input type="checkbox"/>	7
Horseback	<input type="checkbox"/>	8
Other (please write below):	<input type="checkbox"/>	9

Q13) Approximately how much time did you spend on the path?

Up to 15 minutes	<input type="checkbox"/>	1 (40)
15-30 minutes	<input type="checkbox"/>	2
30 minutes – 1 hour	<input type="checkbox"/>	3
1-2 hours	<input type="checkbox"/>	4
2-3 hours	<input type="checkbox"/>	5
3-5 hours	<input type="checkbox"/>	6
More than 5 hours	<input type="checkbox"/>	7
Don't know	<input type="checkbox"/>	Y

Q14) Please write down what you particularly like about the path:

Q15) And what do you think needs improved, if anything?

Q16) How likely are you to come back and use another section of this path on another day? PLEASE TICK THE BOX THAT APPLIES:

Very likely		1 (41)
Quite likely		2
Neither likely nor unlikely		3
Not very likely		4
Not at all likely		5
Don't know		Y

Q17) Which of the following features in Fife, if any, were important in your decision to visit Fife? PLEASE TICK THE BOXES THAT APPLY AND WRITE IN ANY OTHERS NOT LISTED:

The coastal paths		2 (43)
Cycle routes		3
The beaches		6
The towns and villages		7
Woodland areas		8
Golf courses		9
Nature reserves/wildlife centres		0
Other (please write):		x

None of these		Y
Don't know		1(44)

Q18a) How would you rate the following facilities/services along this path?
For each, please tick the answers which you think apply...

	Very good	Good	Neither	Poor	Very poor	Wasn't aware of or didn't use	Don't know	
Car parking	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	<input type="checkbox"/> _X	<input type="checkbox"/> _Y	(46)
Information and signage	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	<input type="checkbox"/> _X	<input type="checkbox"/> _Y	(47)
Paths	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	<input type="checkbox"/> _X	<input type="checkbox"/> _Y	(48)
Public toilets	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	<input type="checkbox"/> _X	<input type="checkbox"/> _Y	(49)
Catering facilities	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	<input type="checkbox"/> _X	<input type="checkbox"/> _Y	(50)
Provision of litter bins	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	<input type="checkbox"/> _X	<input type="checkbox"/> _Y	(51)
Seating	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	<input type="checkbox"/> _X	<input type="checkbox"/> _Y	(52)

Q18b) Have you ticked poor or very poor for any of the facilities/services? If so, please can you explain why you think the facility or service is poor?

- i) Car Parking _____
- ii) Information and signage _____
- iii) Paths _____
- iv) Public toilets _____
- v) Catering facilities _____
- vi) Provision of litter bins _____
- vii) Seating _____

Q19) Are there any activities or facilities not currently available along this path which you would like to see provided?

PLEASE WRITE IN DETAIL...

(53)

Q20a) How did your visit compare with expectations?

PLEASE TICK THE BOX THAT APPLIES

Better than you expected	<input type="checkbox"/>	1 (54)
Worse than you expected	<input type="checkbox"/>	2
About the same as you expected	<input type="checkbox"/>	3
Didn't know what to expect	<input type="checkbox"/>	4

Q20b) If your trip was better or worse than expected, why do you say that?

PLEASE WRITE IN THE SPACE BELOW...

Q21) Including yourself, how many people (adults and children) were with you when you visited the path?

PLEASE WRITE IN BELOW:

TOTAL:

No. Adults (16+ yrs)

No. Children (Under 16)

OFFICE USE ONLY
(1-11) REPEAT
(12) 3

Q22a) Which of the following daily newspapers do you read on a regular basis if any?

Q22b) ...and which of the following Sunday newspapers do you read on a regular basis if any?

Press and Journal	<input type="text"/>	1 (57)
The Courier	<input type="text"/>	2
The Scotsman	<input type="text"/>	3
The Herald	<input type="text"/>	4
The Times	<input type="text"/>	5
The Daily Telegraph	<input type="text"/>	6
Financial Times	<input type="text"/>	7
The Guardian	<input type="text"/>	8
Daily Mail	<input type="text"/>	9
Daily Express	<input type="text"/>	x
The Sun	<input type="text"/>	1 (58)
Daily Record	<input type="text"/>	2
Daily Star	<input type="text"/>	3
The Independent	<input type="text"/>	4
Daily Mirror	<input type="text"/>	5
London Evening Standard	<input type="text"/>	6
Other (write below)	<input type="text"/>	7
<hr/>		
None of these	<input type="text"/>	0

Scotland on Sunday	<input type="text"/>	1 (59)
Sunday Herald	<input type="text"/>	2
Sunday Times	<input type="text"/>	3
The Sunday Telegraph	<input type="text"/>	4
The Observer	<input type="text"/>	5
The Financial Mail on Sunday	<input type="text"/>	6
Sunday Express	<input type="text"/>	7
News of the World	<input type="text"/>	8
Sunday Mail	<input type="text"/>	9
Sunday Post	<input type="text"/>	x
Sunday Mirror	<input type="text"/>	1 (60)
Independent on Sunday	<input type="text"/>	2
The People	<input type="text"/>	3
The Business	<input type="text"/>	4
Other (please write below):	<input type="text"/>	5
<hr/>		
None of these	<input type="text"/>	0

Q22c) Which local newspapers, if any, do you read on a regular basis?

Finally, please can you fill in some personal details about yourself. These details are treated confidentially and will not be distributed to third parties.

23) Your sex:

Male	<input type="text"/>	1 (45)
Female	<input type="text"/>	2

24) Your age:

<input type="text"/>	<input type="text"/>	(46)
----------------------	----------------------	------

25) Your marital status:

Married / Living as married	<input type="text"/>	1 (47)
Single	<input type="text"/>	2
Widowed/Divorced/Separated	<input type="text"/>	3

26) Your current working status:

In full-time employment (30+ hrs/wk)	<input type="text"/>	1 (48)
In part-time employment (8-29 hrs/wk)	<input type="text"/>	2
Work less than 8 hrs/wk/ Not working	<input type="text"/>	3

27) Are there any children age 15 and under in your household?

Yes	<input type="text"/>	6 (52)
No	<input type="text"/>	5

28) What is the occupation of the main income earner in your household?

(If retired, please enter previous occupation) (50)

29) Please can you let us know where you received this questionnaire?

Please specify town or village:

30) Do you consider yourself to have a disability or long term illness?

Yes	<input type="text"/>	1 (63)
No	<input type="text"/>	2

31) What is your normal place of residence?

Please specify town or village:

32) How would you describe your cultural or ethnic background?

White - Scottish	<input type="text"/>	1 (61)	Pakistani	<input type="text"/>	8
White - Irish	<input type="text"/>	2	Bangladeshi	<input type="text"/>	9
White – other British	<input type="text"/>	3	Other Asian	<input type="text"/>	0
White – other background	<input type="text"/>	4	Black Carribean	<input type="text"/>	X
Mixed background	<input type="text"/>	5	Black African	<input type="text"/>	Y
Chinese	<input type="text"/>	6	Other black	<input type="text"/>	1 (62)
Indian	<input type="text"/>	7	Other (please write below):	<input type="text"/>	2

**Thank you for taking the time to answer these questions.
Please return your questionnaire using the FREEPOST envelope provided to:**

**TNS Travel and Tourism
19 Atholl Crescent
Edinburgh
EH3 8HQ**

Tel. (0131) 656 4000