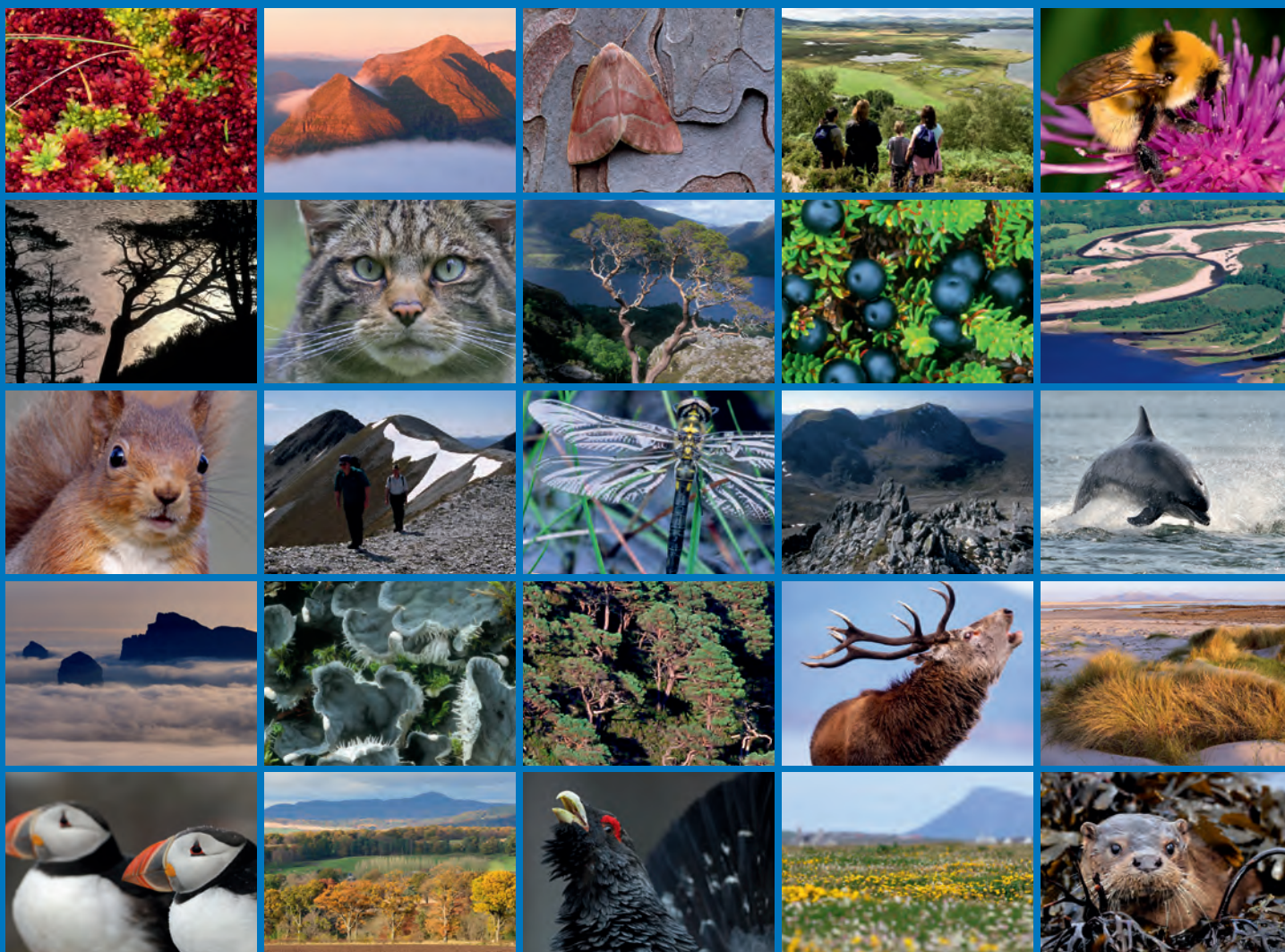


# John Muir Way visitor survey 2014-2015





**Scottish Natural Heritage**  
**Dualchas Nàdair na h-Alba**

All of nature for all of Scotland  
Nàdar air fad airson Alba air fad

# COMMISSIONED REPORT

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**Commissioned Report No. 918**

## **John Muir Way visitor survey 2014-2015**

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# COMMISSIONED REPORT

# Summary

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## John Muir Way visitor survey 2014-2015

**Commissioned Report No. 918**

**Project No: 15191**

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**Year of publication: 2016**

### **Keywords**

John Muir Way; Long Distance Routes; Scotland's Great Trails; visits to the outdoors; participation in outdoor recreation; physical activity in the outdoors.

### **Background**

This report presents the findings from the John Muir Way visitor survey, commissioned in 2014 by Scottish Natural Heritage.

The report provides a baseline estimate of usage of the route and insights into the profile of users, visitors' experiences and their level of awareness of this route and other long distance routes in Scotland.

The research findings presented in this report are based on manual counts and face to face interviews undertaken with a sample of 537 visitors at various locations along the entire length of the route between November 2014 and October 2015.

A summary of the main findings from the survey is provided in the Executive Summary section of the report.

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## **1. EXECUTIVE SUMMARY**

### **1.1 Path awareness and usage**

It is estimated that during the 12 month survey period from November 2014 to October 2015 between 240,000 and 300,000 visits were taken on the John Muir Way.

The interview locations selected for the research were chosen to ensure that visitors on day trips and more extended trips as well as local users were given the opportunity to participate in the survey. For this reason, some locations likely to experience particularly high volumes of regular, local use, such as dog walkers and commuters, were not included in the research. As such, the usage estimates quoted in this report are likely to underestimate the numbers of visits taken by this group.

An estimated 4,900 – 6,000 visits (2%) were being undertaken to complete the route end to end over consecutive days; an estimated 46,000 – 57,000 visits (19%) were being undertaken with the intention of completing the route in sections across several visits.

An estimated 183,000 – 227,000 visits (75%) were taken by walkers and an estimated 59,000 – 73,000 visits were taken by cyclists (24%).

Sixty one per cent of visitors were aware they were on a named path and 49% were aware the path was called the John Muir Way.

A quarter of visitors said the fact that the path was part of the John Muir Way played a part in their decision to visit (26%), with 10% stating that it was their sole reason for visiting. Those who lived more than 2 miles from the path were more likely to state that it was their sole reason for visiting, demonstrating the longer-term potential of the route to attract visitors from further afield and increase potential economic benefits.

Nine per cent of respondents claimed that they had already walked the entire route at the time of their interview and a further 15% planned to do so in future.

Most visitors were aware of the path through general knowledge or because they had always known about it (67%), reflecting a high proportion of local and repeat visitors.

### **1.2 Profile of path users**

Almost half of John Muir Way users were aged 55 and over. There was also a bias towards male users and people in the ABC1 (professional and managerial) social grades.<sup>1</sup>

A third of users (33%) were classed as people who currently 'seldom' visit the outdoors for leisure and recreation (that is, they visit the outdoors once every couple of months or less often), highlighting the potential of the John Muir Way to attract this hard to reach audience.

### **1.3 The John Muir Way user experience**

8 in 10 users were 'extremely/ very' satisfied with their experience of visiting the path. There were very few significant variations within the sample, indicating good levels of satisfaction across a range of users. Key attractions of the path included the variety of views, scenery and landscapes (mentioned by 56%), the quality of the path (33%) and the variety of types of paths and experiences available (16%).

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<sup>1</sup> See Annex 4 for social grade definitions

Signposting represents an area where there is potential for improvement, with a third of all visitors (33%) rating this as 'fair/ poor' and 24% of non-local visitors rating this as 'poor'. Those intending to walk the whole route were more likely to mention path quality and signposting as areas for improvement.

Signage was also highlighted in consultation with local businesses as a potential area for improvement, both on the path and to direct users towards local towns, villages and amenities.

#### **1.4 Visit characteristics**

The majority of path users were on a short trip involving spending less than 3 hours away from home (85%).

Almost half of path users had travelled less than 2 miles from home to reach the path (48%). Driving was the main form of transport used to reach the path (45% of visits), followed by walking (29%) and cycling (20%).

Walking was the primary mode of transport used on the path itself (75%), followed by cycling (24%).

Around 6 in 10 path users were visiting alone (57%). A relatively small proportion of visits included children (8%), suggesting the opportunity may exist to attract more families to the path, particularly given its proximity in some locations to both urban areas and visitor attractions. Forty two per cent of visits were accompanied by a dog.

The John Muir Way offers a real opportunity to deliver both physical and mental health benefits and this is evidenced by the fact that 61% of users cited health or exercise as a reason for visiting while others mentioned enjoying the scenery (22%), relaxation/ unwinding (19%) and/or peace and quiet (16%).

Ten per cent of visits involved the use of some form of navigational aid (e.g. GPS device, map).

Overall, 30% of path users spent any money during their visit.<sup>2</sup> This was higher amongst first-time visitors (59%), non-local visitors (55%) and those on a visit lasting for 3 hours or more (66%). While encouraging local, repeat use is important for a number of other reasons, encouraging longer visits taken by those living further afield offers the greatest opportunity for economic benefit. The average amount spent by those who spent anything was around £18.

#### **1.5 Benefitting local businesses**

Consultations with local businesses revealed that approaches to marketing in general and, in particular, to marketing aimed at benefitting from proximity to the John Muir Way, are variable. In general, the more niche or targeted the product or service on offer (e.g. guided walks, maps, baggage services etc.), the more proactive marketing efforts were. All businesses, however, would value more marketing support and guidance in terms of how best to benefit from their proximity to the John Muir Way.

Respondents from businesses offering a service directly linked to the John Muir Way were more likely to know more about the path, driven to a large extent by necessity but also a high

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<sup>2</sup> It should be noted that this covered all money spent during the visit and may include money spent elsewhere or on items, such as fuel, used at other times and for other purposes. Therefore, it cannot be attributed directly to the John Muir Way.

level of personal interest. Although there was a general feeling of it being 'early days' for the John Muir Way, there was optimism, particularly amongst those with a clear link/ direct benefit, regarding the potential economic benefit of the path.



## 2. BACKGROUND

The John Muir Way stretches for 134 miles across central Scotland, from Helensburgh in the West coast through to Dunbar on the East coast.

The route officially opened in April 2014 and is named after the conservationist John Muir who was born at Dunbar and became a founder of America's national park system. The route was planned and developed by Scottish Natural Heritage (SNH) with the involvement of Local Authority and other partners.

The route traverses both rural and urban landscapes using tracks, canal towpaths, old minor roads and disused railway lines, offering a variety of terrains and views to users. It is designed to be attractive for local day trips as well as end-to-end use, with easy access to places of interest, public transport and accommodation along the way.

The John Muir Way Visitor Survey was commissioned to provide SNH and its partners (including Local Authorities, Sustrans, Central Scotland Green Network Trust and Scottish Government) with a baseline estimate of the volume of usage of the route and insights into the profile of users, visitors' experiences and their awareness of this route as well as other long distance routes in Scotland. The research focused on the sections of the route most likely to be used by day visitors and visitors undertaking extended trips. The survey of 537 visitors took place over a twelve month period from November 2014 to October 2015.

The survey also provided an opportunity to develop and test a survey approach that could be applied to surveys on the wider network of Scotland's Great Trails.<sup>3</sup> Section 9 of this report features observations based on the experience of undertaking the John Muir Way Visitor Survey and recommendations for any similar surveys of Long Distance Routes undertaken in the future.

### 2.1 Objectives

The John Muir Way Visitor Survey provides estimates of usage and data on visitor profiles, knowledge and experience. Figure 2.1, below, illustrates the survey's role and the five key information needs it was commissioned to address.

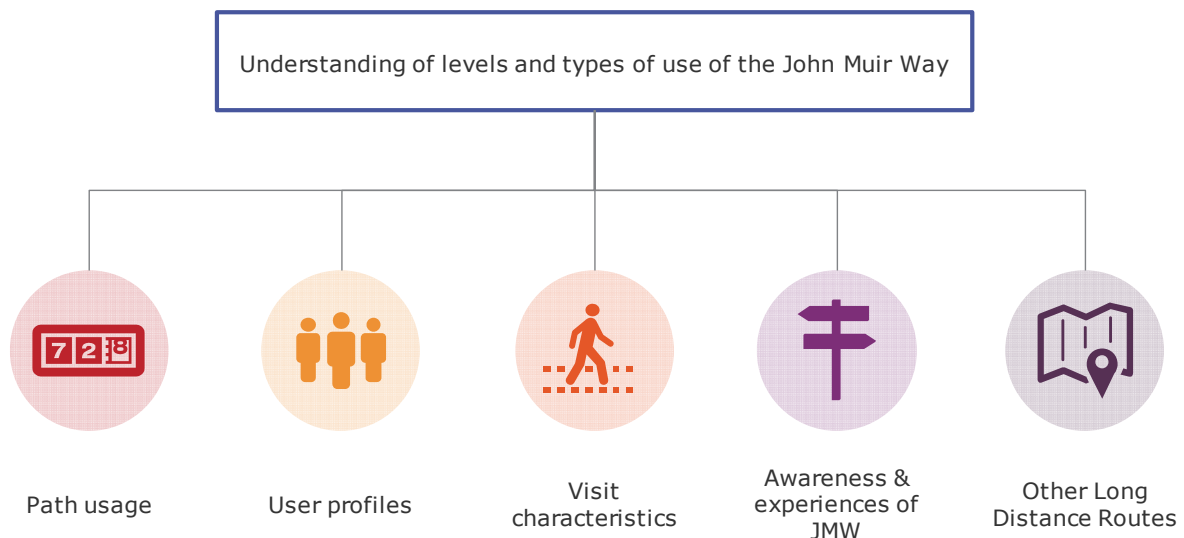
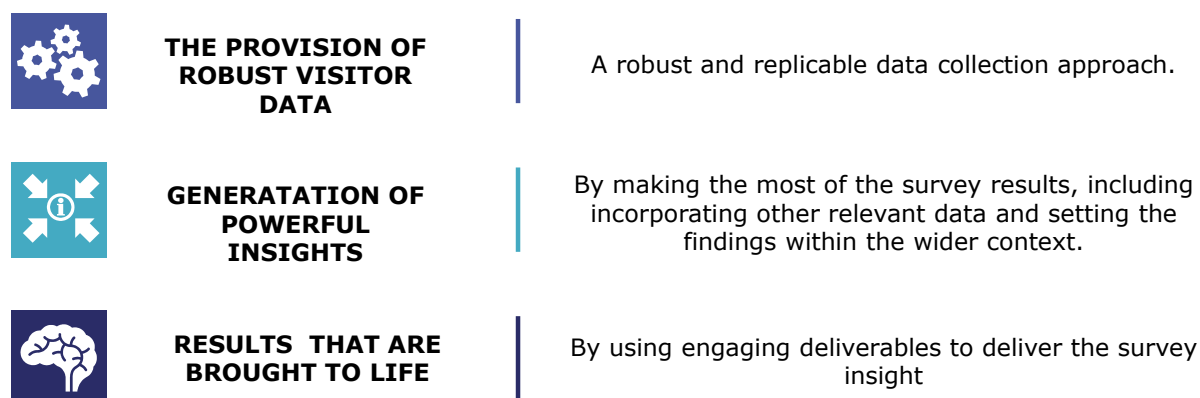


Figure 2.1. The role of the JMW survey in providing data on path users and usage

<sup>3</sup> <http://www.snh.gov.uk/enjoying-the-outdoors/where-to-go/routes-to-explore/scotlands-great-trails/>

Underpinning each of these subject areas and the overall survey aim were three key requirements for the survey design:



*Figure 2.2. Key requirements for the survey design*

A full copy of the questionnaire used can be found in Annex 1.

To accompany the visitor survey and counts, a selection of businesses located on or close to the John Muir Way were also interviewed to investigate the wider impact and opportunities the route provides from a local business perspective.

## **2.2 Methodology**

### *2.2.1 User survey*

Following consideration of the merits of a number of potential approaches, it was agreed that the user survey should be undertaken on-site by means of manual counts and face to face interviews at specific locations along the John Muir Way.

As the path runs through both urban and rural areas, a selection of interview locations were chosen in order to cover the full length of the route and to ensure that visitors on day trips and more extended trips as well as local users were given the opportunity to participate. For this reason, locations likely to experience particularly high volumes of regular, local use, such as dog walkers and commuters, were not included in the research. As a result, the visit estimates included in this report are likely to under-estimate the numbers of visits taken by this group

Prior to fieldwork, site visits were undertaken to determine the most appropriate locations at which to conduct the interviews, taking into account estimated levels of usage, location and interviewer safety. The locations covered in the survey are shown in Table 2.1 below, along with the estimated levels of use attributed to each location at the site visit stage. A map showing the interviewer locations is shown in Annex 6.

*Table 2.1. User survey interview locations and number of interviews achieved*

Interview locations	Estimated usage	Interviews Achieved
Dunbar/ East Linton	Low	18
North Berwick	Medium	63
Brunstane Burn	Low	30
Dalmeny	Medium to High	66
Blackness	Medium to High	72
Bo'ness	Medium	76
Bonnybridge	Low to Medium	62
Craigmarloch	Low to Medium	48
Strathblane/Kilsyth	Low	41
Helensburgh	Medium	61

Path users were interviewed at the point at which they met the interviewer, with a question included in the survey to determine the stage of their visit at that time (start, middle or end). Those who were simply crossing over the path and not intending to visit were not interviewed. All those interviewed were aged 16 and over. Where a group of users was encountered, the next birthday rule was used to select the party member eligible for interview. This approach avoided the introduction of any bias from individual members of the party self-selecting themselves for interview. A target of 12 completed interviews per shift was set.

For the purposes of this report, data have been analysed for all respondents and for interviews conducted in each of the four locations shown in Table 2.2, allowing for some analysis and insights to be reported at a more local level.

*Table 2.2. Sections of JMW and number of user interviews achieved*

Interview locations	Total Interviews Achieved
Helensburgh/Strathblane/Kilsyth	102
Craigmarloch/Bonnybridge	110
Bo'ness/Blackness/Dalmeny	214
Brunstane Burn/N Berwick/Dunbar/E Linton	111

Insights from the visitor survey can be found in Sections 5 to 7 of this report.

### *2.2.2 Counts of users*

During every fieldwork shift interviewers also recorded the number of visitors passing them on the route each hour. These data were used to calculate annual estimates of total usage of the John Muir Way (see section 3 for details of analysis approaches and results from this element of the survey).

Counts were recorded using a simple count pro-forma (see Annex 2). The form was designed to collect the key data needed while ensuring that the task of counting was kept as straightforward as possible.

Data were collected for hourly periods (e.g. 10am to 11am, 11am to 12 am, etc.) with fieldworkers recording whether visitors were on foot, bicycle or using another mode of

transport (e.g. horse). The data were subsequently checked against the profile of those interviewed to determine whether there was any under representation of specific groups. More detail on the count analysis undertaken can be found in section 3.

### 2.2.3 Survey of businesses

To assess the wider impact of the path, a series of depth interviews were undertaken with businesses operating on or near the John Muir Way. Sixteen businesses were consulted via a telephone depth interview about the impact of the path on their business and opportunities to maximise its benefit for businesses in the future. The interviews covered a range of relevant businesses situated at various points along the path including:

- Accommodation providers
- Cycle shops/hire
- Information providers
- Cafés/ restaurants
- Holiday operators/ service providers

Further details on these interviews and the findings generated can be found in section 8 of this report.

## 2.3 Survey materials

Figure 2.3 below outlines the information collected during the manual counts and interviews undertaken for the John Muir Way Visitor Survey:

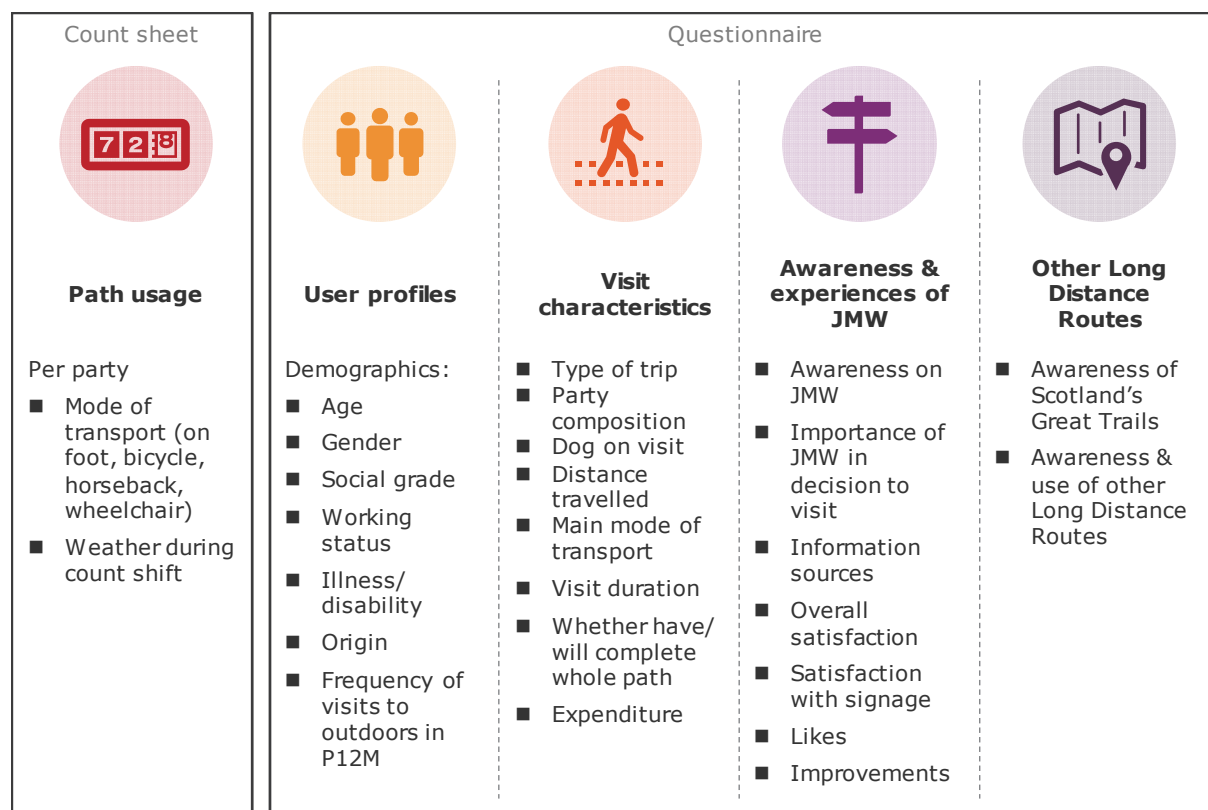


Figure 2.3. Count sheet and questionnaire topics covered

More detail on each can be found in Annex 1 (Questionnaire) and Annex 2 (Count sheet).

## 2.4 Margins of error

The survey findings are based on interviews with a sample of John Muir Way path users rather than all users. As such, they are subject to a degree of sampling error.

Findings based on the total sample of 537 interviews are accurate to within +/- 4.2% at the 95% confidence level; findings based on a sub-sample of around 150 visitors provide visit level data accurate to within +/- 8.0% at the 95% confidence level. These margins of error also take account of elements of the survey design, such as how respondents are selected, which can reduce the accuracy of data.

## 2.5 Definitions

Throughout this report, the following terms have been used:

- *Wave 1* – this corresponds to the first wave of interviewing and covers the period November 2014 to February 2015. Throughout the report this will be referenced as ‘winter’.
- *Wave 2* – covers the interviewing period from March 2015 to June 2015 and throughout the report will be referenced as ‘spring’.
- *Wave 3* – covers the interviewing period from July 2015 to October 2015 and throughout the report will be referenced as ‘summer/autumn’.
- *Local* user – all respondents who gave a postcode that was within 2 miles of the John Muir Way.
- *Non-local* user – all respondents who gave a postcode that was 2 miles or more from the John Muir Way.
- *Short-trip* – all respondents who were less than three hours from home.
- *Day-trip* – all respondents who were more than three hours from home.
- *Long-trip* – all respondents who were staying away from home.

### **3. PATH AWARENESS AND USAGE**

#### **3.1 Path usage levels - Method and analysis approach**

To help estimate the numbers of visits taken on the sections of the John Muir Way most likely to be used by day visitors and visitors on extended trips, manual counts were undertaken alongside the face to face interviews on each of the 42 interview shifts. The count sheets (see Annex 2) collected information on:

- Weather conditions;
- Time period covered (including any breaks taken)
- Counts per party (and overall) of users on foot, on bicycles, on horseback and those in wheelchairs

As described in detail in Annex 5, the count data collected during these fieldwork shifts have been used alongside data obtained from automatic counters installed in two locations on the route (Dalmeny and Strathblane) to produce estimates of total annual visits at each location. In turn these data have been used to produce an estimate of total annual path usage.

#### **3.2 Visit estimates**

It is estimated that during the 12 month survey period from November 2014 to October 2015 around 240,000 to 300,000 visits were taken on the John Muir Way in the locations most likely to be used by day visitors and visitors on extended trips.

Note that this estimate is provided as a range rather than an exact figure to reflect the margin of error associated with these results and the range of results that are obtained when alternative approaches are used to 'gross up' the counts obtained through the survey to estimates of annual usage (see Annex 5 for further details).

Based on the count data, an estimated 70% of all visits to the John Muir way were taken on weekdays while 30% were taken during weekends. This distribution suggests a fairly even weekday/ weekend distribution, potentially a reflection of the high levels of local usage for activities such as dog walking which are likely to occur on every day of the week.

Applying the survey data (see section 4) to these count estimates it is possible to estimate volumes of visits taken by different groups of users. For example, of the total 240,000 – 300,000 visits taken:

- an estimated 4,900 – 6,000 visits (2%) were being undertaken to complete the route end to end as a single walk over consecutive days;
- an estimated 46,000 – 57,000 visits (19%) were being undertaken with the intention of completing the route in sections across several visits;
- an estimated 183,000 to 227,000 (75%) were taken by walkers and an estimated 59,000 and 73,000 visits (24%) were taken by cyclists.

The estimated visits taken at each interview location are shown in Table 3.1 overleaf, the estimates for selected path sections are shown in Table 3.2 and the estimated visits taken by different types of users are shown in Table 3.3.

Table 3.1. Estimated annual visits by location

Interview location	Lower estimate	Upper estimate
Dunbar/ East Linton	16,300	22,000
North Berwick	28,800	30,900
Brunstane Burn	49,400	49,800
Dalmeny	20,700	36,200
Blackness	24,800	27,100
Bo'ness	19,600	24,200
Bonnybridge	31,400	49,700
Craigmarloch	20,100	22,400
Strathblane/Kilsyth	15,500	22,200
Helensburgh	15,200	19,900
<b>Total</b>	<b>243,900</b>	<b>302,300</b>

Note: the sum of individual locations may not equal the overall total due to rounding

Table 3.2. Estimated annual visits by path sections

Interview location	Lower estimate	Upper estimate
Helensburgh/Strathblane/Kilsyth	30,700	42,100
Craigmarloch/Bonnybridge	51,500	72,100
Bo'ness/Blackness/Dalmeny	65,100	87,500
Brunstane Burn/N Berwick/Dunbar/E Linton	96,600	100,600
<b>Total</b>	<b>243,900</b>	<b>302,300</b>

Note: the sum of the individual path sections may not equal the overall total due to rounding

Table 3.3. Estimated annual visits by completion/plan to complete whole John Muir Way end to end and by mode of transport

	% of Total interviewed	Lower estimate	Upper estimate
Completed/plan to complete whole route over consecutive days	2%*	4,900	6,000
Completed/plan to complete whole route over several trips	19%*	46,000	57,000
Total visits where walking was mode of transport used on path	75%	183,000	227,000
Total visits where cycling was mode of transport used on path	24%	59,000	73,000

\* An additional 3% of respondents were not sure if they would complete the whole route over consecutive days or over several trips.

\*\*

### 3.3 Awareness of the John Muir Way

To measure awareness of the name of the route, all respondents were asked if they were aware they were on a named path, and if so, if they knew the name of the path.

As shown in Figure 3.1, 61% of all path users were aware they were on a named path and 49% were aware the path was called the John Muir Way. Around two in five visitors (39%) were not aware they were on a named path. There was no difference in awareness among local and non-local visitors.

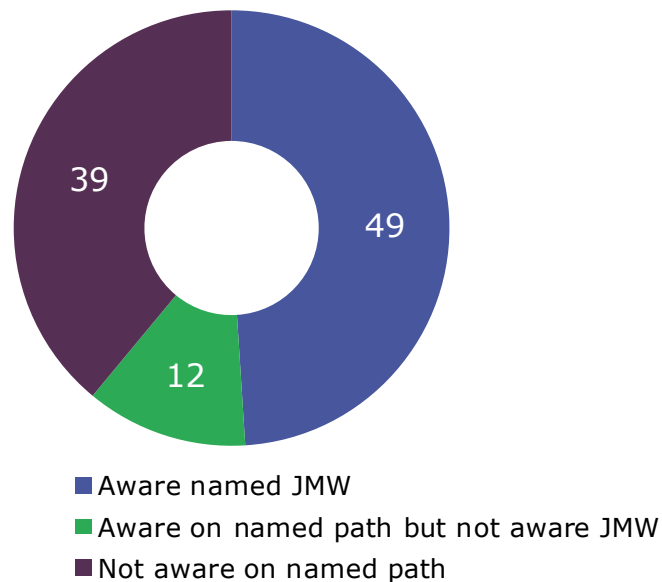


Figure 3.1. Awareness of JMW name (Base = All respondents - 537)

Not surprisingly, visitors who had already walked or planned to walk the whole route were more likely to be aware they were on a named path (76% vs. 56% of those not planning to walk whole route), as were path users aged 55+ compared to those in the younger age group (63% vs. 50% of those aged 16-34). There were few variations among visitors who were aware the path name was the John Muir Way.

By location, awareness of being on a named path was higher among visitors interviewed at the start and end sections of the route - Helensburgh/Strathblane/Kilsyth (77%) and Brunstane Burn/North Berwick/Dunbar/East Linton (71%). In comparison, visitors in Craigmarloch/Bonnybridge (51%) and Bo'ness/Blackness/Dalmeny (53%) recorded lower levels of awareness. When asked for the name of the path, 94% of the visitors interviewed in Helensburgh/Strathblane/Kilsyth who knew that they were on a named path were able to state that the name of the path was the John Muir Way.

While there was no difference in awareness of being on the John Muir Way among local and non-local visitors, there was a seasonal difference. Amongst all visitors, those interviewed in winter and spring were more likely than those interviewed during the summer/autumn period to be aware that they were on the John Muir Way (56% and 42% respectively).

To further assess the impact of the route, respondents were asked how important it was that the path was part of the John Muir Way in their decision to visit.



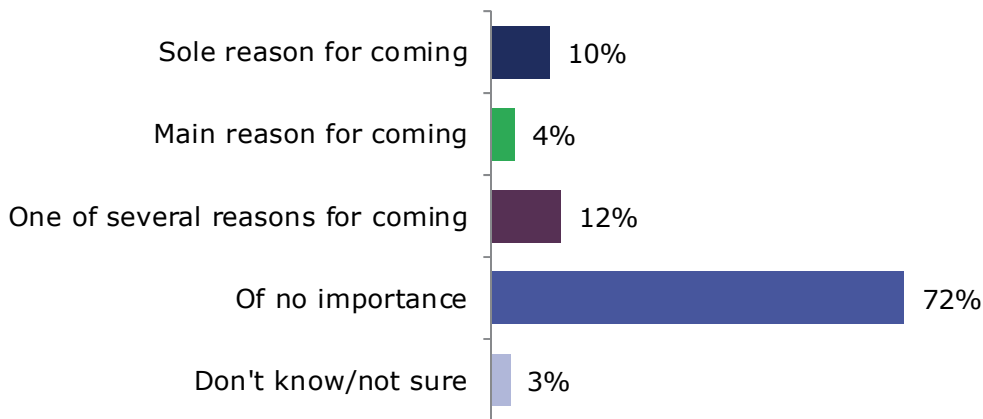


Figure 3.2. Importance of JMW in decision to visit (Base = All respondents - 537)

As shown in Figure 3.2, a quarter (26%) of visitors said the John Muir Way played a part in their decision to visit the path, with 10% stating it was the sole reason for their visit. Non-local people were more likely to say the John Muir Way was their sole reason for visiting (17% vs. 7% of locals), while local people were more likely to say the name was of no importance in their decision to visit (77% vs. 54%), demonstrating the longer-term potential of the route to attract visitors from further afield.

Looking at the data by population groups, men (reflecting their higher intention to complete the whole route), were more likely than women to say the John Muir Way was the sole reason for their visit (12% vs. 6%), as were path users in the ABC1 social grade (13% vs. 5% of those in the C2DE social grade).<sup>4</sup>

Other variations by population group include:

- 14% of cyclists stated that the John Muir Way was their sole reason for visiting compared to 8% of walkers
- 19% of first time visitors stated that the John Muir way was their sole reason for visiting compared to 8% of repeat visitors
- 18% of those visiting the path for 3+ hours stated that the John Muir Way was their sole reason for visiting compared to 7% of those spending less than 3 hours on the path.

In addition, 15% of those aware of the path name stated that the path was their sole reason for visiting and 41% overall stated that it had some influence on their visit that day. By path section, a higher proportion of visitors interviewed in Helensburgh/Strathblane/Kilsyth stated that the path was their sole reason for visiting (35%).

<sup>4</sup> See Annex 4 for social grade definitions

### 3.4 Sources of information on the John Muir Way

To assess the effectiveness of the promotion of the newly branded route, all respondents were asked what sources of information they had used to find out about the path. These results are shown in Figure 3.3 below.



Figure 3.3. Sources of information about JMW (Base = All respondents - 537)

Around two thirds of visitors indicated that they were aware of the route through general knowledge or had always know about it (67%) and 15% had found out about it from friends and relatives. Relatively low proportions of visitors indicated that their awareness of the route came from information on the internet or signposting, although it is notable that a higher proportion of non-local people mentioned these information sources (8% vs. 2% of local people and 7% vs. 2% of local people respectively).

General knowledge of the path increased with age, with those aged 55+ more likely to state that they already knew about it (72% vs. 67% of 35-54 year olds and 48% 16-34 year olds). Conversely, those in the younger age groups were more likely to have noticed the path when passing by (14% vs. 8% of all respondents) or to have used the John Muir Way website (3% vs. 1% of all respondents).

By interview location, visitors interviewed in the Brunstane Burn/North Berwick/Dunbar/East Linton area were the most likely to have always known/have general knowledge about the route (79%), perhaps due to the proximity to John Muir's birthplace museum and also familiarity with the previous John Muir Way Trail.

In addition to the sources shown in Figure 3.3, above, smaller proportions of visitors mentioned more 'formal' sources of information such as 'saw a leaflet', 'guide book', 'newspaper/magazine', 'radio/television' and the 'John Muir website'.

### 3.5 Completing the whole of the John Muir Way

To help gauge the interest of visitors in the John Muir Way as a route to be completed in its entirety, all respondents were asked if they had or intended to travel the entire route.

As shown in Figure 3.4, around a quarter (24%) of all visitors claimed they had already or intended to complete the whole route; 9% (an estimate of 22,000 – 27,000 visits) stated that they had already completed the entire route at the time of the interview and 15% (an estimate of 37,000 – 45,000 visits) planned to do so in future. The majority of path users did not intend to complete the whole route in future (70%) and 6% were undecided.

Among those who already had or intended to complete the whole route, the majority stated they completed/planned to complete the whole route over several visits (80%) rather than over consecutive days (8%). 12% were unsure how they would complete the route.

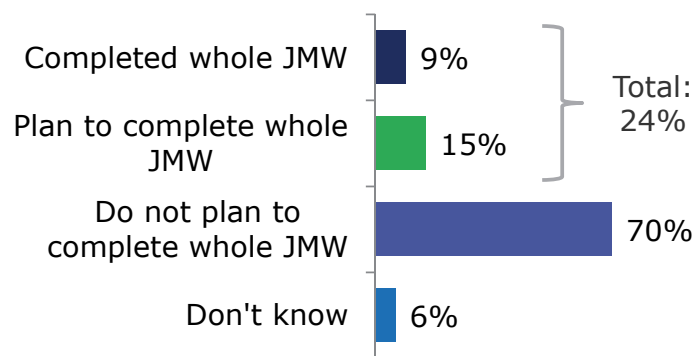


Figure 3.4. Proportion of visitors who have completed/plan to complete the whole JMW (Base: All respondents 537)

Men were more likely than women to say they had already or intended to complete the whole route (28% vs. 19%) and cyclists were more likely than walkers to make this claim (43% vs. 19%). There were also some seasonal variations, with the proportion of respondents who said they had already completed the whole route increasing from 4% during winter/spring, to 14% during the milder weather in summer/autumn. Similarly, intention to walk the whole route increased from 9% in winter to 15% in spring and 16% in summer/autumn.

Compared to the other interview locations, visitors interviewed in Bo'ness/Blackness/Dalmeny were the least likely to have walked or be intending to walk the whole route (11%).

Additional variations included:

- Non-locals (23%) were more likely than locals to indicate that they planned to walk the whole route (13%);
- First-time visitors,<sup>5</sup> who were more likely to be non-locals, were more likely than repeat visitors to say they intended to walk the whole route in the future (24% and 13% respectively);

<sup>5</sup> Caution, small base (N=75)

## 4. PROFILE OF PATH USERS

### 4.1 Demographic profile

The profile of visitors interviewed on the John Muir Way is shown in Figure 4.1.

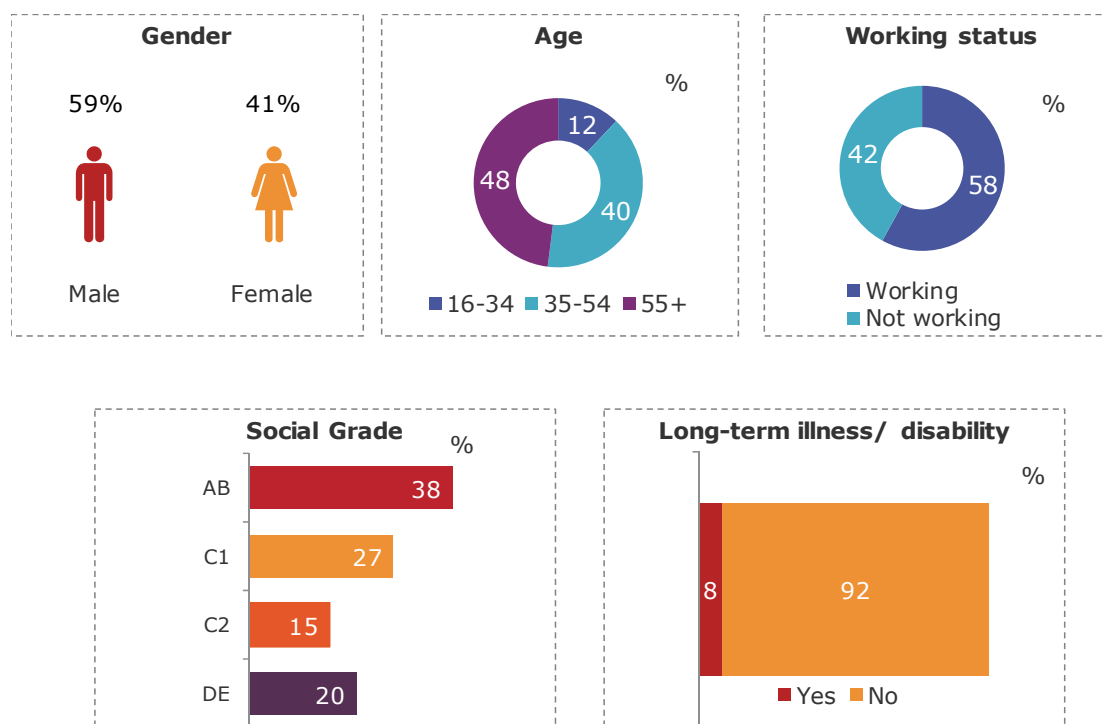


Figure 4.1. Demographic profile of John Muir Way path users (Base: All visitors – 537)

In comparison to outdoor visitors in general, as recorded by Scotland's People and Nature Survey (SPANS) in 2013/14,<sup>6</sup> visitors on the John Muir Way are more likely to be male (59% vs. 48% of all outdoor visitors) and aged 55 and over (48% vs 21% of all outdoor visitors).

In terms of social grade, John Muir Way visitors reflect levels of participation in outdoor recreation generally, with the majority of path users in the ABC1 social grade (65%) and just over a third in the C2DE social grade (35%). This is further reflected in the working status of path users, with six in ten either in full or part-time employment (58%) and four in ten a student, unemployed or retired (42%). In comparison to outdoor visitors generally, visitors on the John Muir Way are more likely to be in social grade ABC1 (65% vs 54% of all outdoor visitors).

People with a long-term limiting illness, health problem or disability are currently under-represented on the John Muir Way: 6% per cent of path users stated they were limited 'a little' by a disability (increasing to 11% among those aged 55+) and 2% that they were limited 'a lot'. In comparison, the levels of disability recorded by SPANS among the Scottish adult population as a whole are slightly higher with 14% of adults limited 'a little' by a disability and 12% limited 'a lot'.

<sup>6</sup> <http://www.snh.gov.uk/docs/A1471713.pdf>

Overall, nearly all the path users were from the UK (99%), although during the final wave of interviewing (July to October 2015), the number of path users from Europe, the USA and Canada increased to 7%.

## 4.2 Frequency of visiting the outdoors in the last 12 months

To help determine their general outdoor recreation behaviour, each respondent was asked how often they had visited the outdoors for leisure or recreation in the 12 months prior to interview.

As shown in Figure 4.2, the frequency definitions used are:

- *Frequent* – visit the outdoors once a week or more often;
- *Occasional* – visit once or twice a month;
- *Seldom* – visit every 2-3 months or less often.

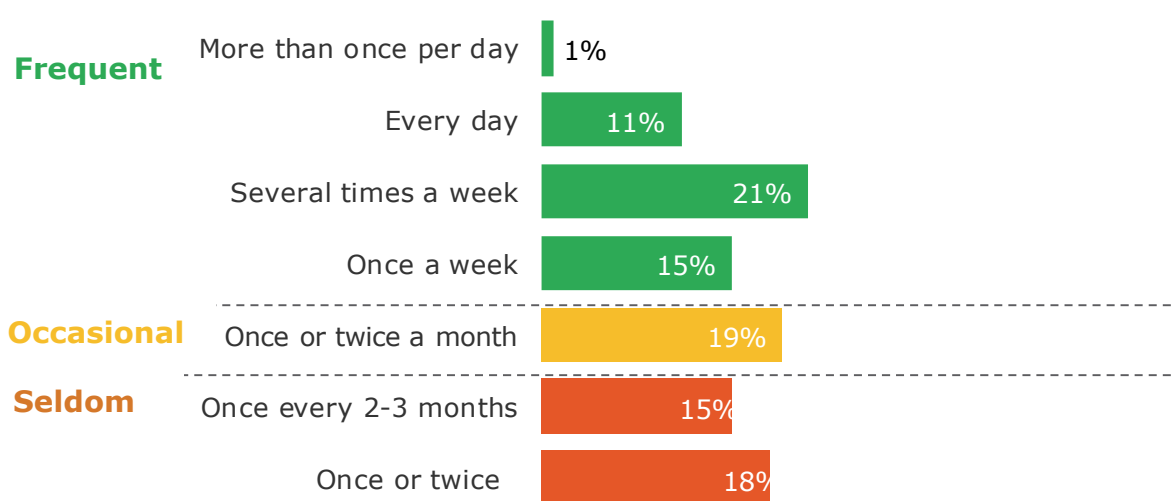


Figure 4.2. Claimed frequency of visits to the outdoors in the previous 12 months (Base: All visitors – 537)

Nearly half (48%) of all John Muir Way users claimed to be *frequent* visitors to the outdoors, 19% were *occasional* visitors, and a third (33%) *seldom* visited

As shown in Table 4.1, below, in comparison to visitors to the outdoors generally, the John Muir Way appears to be used by a higher proportion of those who say they seldom visit the outdoors for leisure and recreation (33% of JMW visitors vs 19% of all outdoor visitors), highlighting the longer-term potential of the path to attract this hard to reach audience.

Table 4.1. Table showing frequency of visits to the outdoors in previous 12 months (Base: JMW – All respondents 537, SPANS – 4,694)

	JMW Visitor Survey	SPANS (all outdoor visitors)
Frequent visitor	48%	61%
Occasional visitor	19%	20%
Seldom visitor	33%	19%

## 5. VISIT CHARACTERISTICS

### 5.1 Trip profile

To provide further information on the profile of John Muir Way visitors, respondents were asked what type of trip they were on and who they were visiting the path with.

As shown in Figure 5.1, the definitions of trips used were as follows:

- *Short trip* – 3 hours or less from home
- *Day trip* – 3 hours or more from home
- *Longer trip* – staying away from home

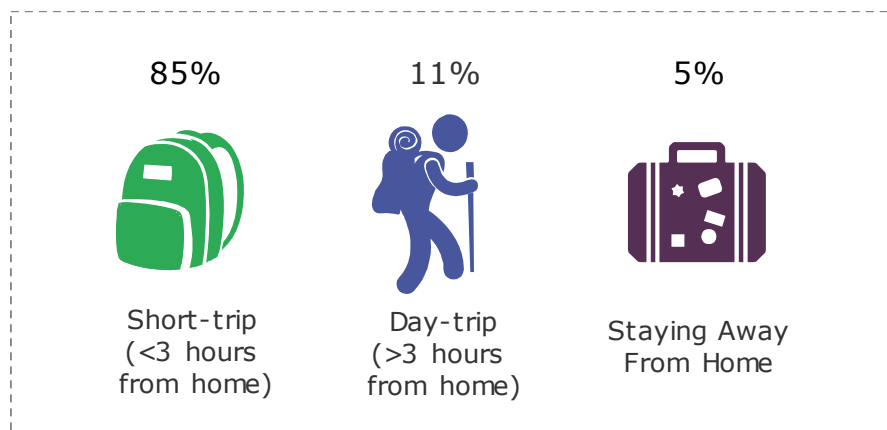


Figure 5.1. Type of trip (Base: All visitors – 537)

Over the course of the year, 95% of path users were on some form of day outing with 85% less than three hours from home (short-trip) and 11% more than three hours from home (day-trip). The remaining 5% of path users were staying away from home.

Local users were more likely to be on the path for a short trip (91% vs. 73% of non-locals); conversely, non-locals were more likely to spend 3+ hours on the path (21% vs. 9% of locals).

There were also some notable variations by demographic group:

- A higher proportion of females were on a short-trip compared to males (89% vs. 82%);
- A higher proportion of males were on a day-trip compared to females (13% vs. 7%);
- A higher proportion of visitors aged over 55+ were on a short-trip compared to those aged under 55 (87% vs. 82%);
- A higher proportion of path users in the C2DE social grade were on a short trip compared to path users in the ABC1 social grade (91% vs. 81%).

There were also some notable fluctuations by season, with the proportion of day-trippers increasing from 7% in winter to 16% in the milder weather in spring and, reflecting the increase in international visitors in the final wave of research, the proportion of path users staying away from home increased from <1% in winter to 8% in summer/autumn.

By location, there was a higher proportion of day-trippers in Bonness/Blackness/Dalmeny (16%) than in the other interview locations.

Figure 5.2 shows the party composition of the respondents interviewed on the John Muir Way.

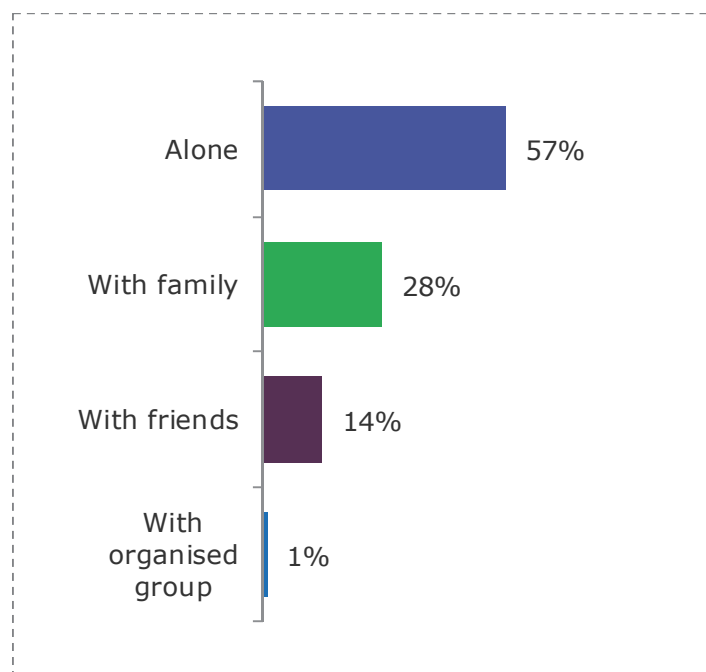


Figure 5.2. Party composition (Base: All visitors – 537)

Nearly six in ten of all path users were travelling on the path alone (57%), with smaller proportions travelling with family members (28%), with friends (14%) and a very small proportion travelling as part of an organised group (1%, increasing to 4% among visitors in Craigmarloch/Bonnybridge). Solo path users were more likely to be local (62% vs. 42% of non-locals); conversely, people visiting with a family were more likely to be non-local (42% vs. 26% of locals).

In terms of party size, just over a third of visitors (35%) were in a party of two or three adults and 3% were in a party of four or more. A relatively small proportion of all path users were accompanied by children (5% accompanied by one child and 3% by two or more children).

There were also some notable variations in party composition by demographic group:

- 67% of cyclists were visiting alone
- men were more likely to visit alone (64% of men vs 46% of women visited alone)
- Path users visiting with friends were more likely to be female (20% of women visited with friends vs. 10% of men) and in the younger age group (21% of 16-34s visited with friends vs. 11% of 55+).
- Path users travelling with family members were more likely to be in the AB social grade (34% of ABs visited with family vs. 24% of C1C2DEs).

Interviewers also noted if respondents were accompanied by a dog on their trip (Figure 5.3). Overall, a slightly higher proportion of visits were taken without a dog (58%) than with a dog (42%). The proportion of visits on the John Muir Way accompanied by a dog was lower than that for visits to the outdoors in general as recorded by SPANS in 2013/14 (48%).

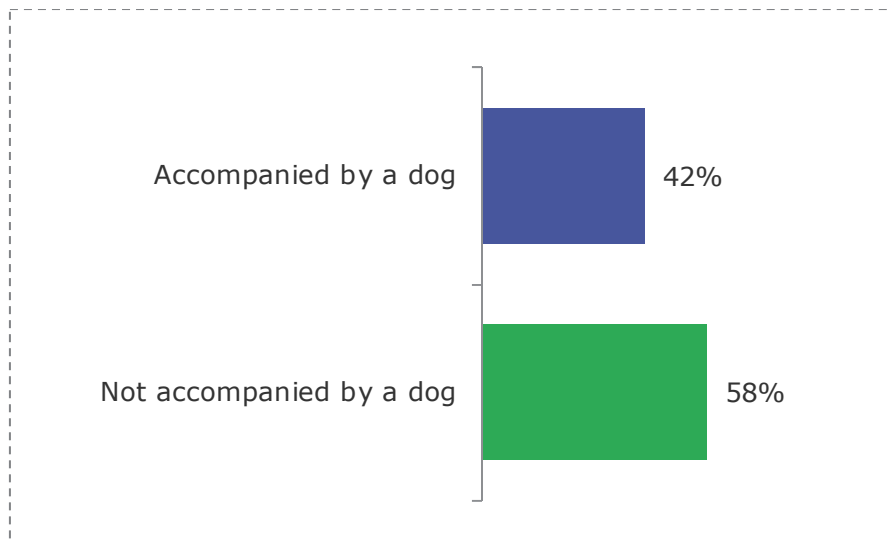


Figure 5.3. Proportion of visits taken with a dog (Base: All visitors – 537)

Variations between population groups included:

- Females were more likely than males to be walking a dog (53% vs. 35%)
- Path users in part-time employment (53%) or retired (46%) were more likely than those in full-time employment (35%) to be walking a dog
- Path users in the DE social grade were more likely to be walking a dog than those in the AB social grade (51% vs. 38%).
- A higher proportion of those on a visit of less than 3 hours visited with a dog than amongst those on a visit of 3 hours or more (50% and 13% respectively).

There were also some notable seasonal variations, with a higher proportion of dog walkers recorded in winter (63%), declining to 39% in spring/summer/autumn with more visits involving other activities during these months.

Finally, a higher proportion of local path users were recorded walking a dog (49% vs. 29% of non-locals).



## 5.2 Visit duration

Most visitors spent less than three hours on the path (78% vs. 21% who spent 3+ hours).

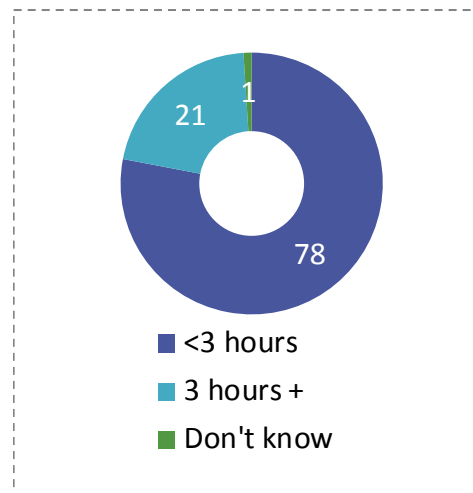


Figure 5.4. Length of time spent on the JMW (Base = All respondents - 537)

Variations by population groups include:

- Females were more likely than males to spend less than 3 hours on the path (84% vs. 74%)
- Walkers were more likely than cyclists to spend less than 3 hours on the path (83% vs. 63% of those cycling),

There was also a seasonal variation, with an increase in the proportion of visitors spending 3+ hours on the path in the spring/summer/autumn months (23% vs. 9% in winter). First-time visitors were also more likely to have been on a visit of 3 hours or more (47%) as were non-locals (42%).

### 5.3 Reasons for visiting the John Muir Way

Respondents were also asked about their reasons for visiting the John Muir Way. The main reasons for visiting the path are shown in Figure 5.5.



Figure 5.5. Reasons for visiting the John Muir Way (Base = All respondents - 537)

The most frequently cited reasons for visiting the path were health or exercise (61%) and exercising a dog (40%). Around a fifth of visits were taken to enjoy the scenery (22%), enjoy the fresh air/weather (20%) and to relax and unwind (19%). These motivations are similar to those recorded for outdoor visits in general by SPANS in 2013/14 where the most frequently cited reasons for visiting the outdoors were health or exercise (43%), exercising a dog (42%), to relax or unwind (27%) or to enjoy fresh air or pleasant weather (25%). The proportion of John Muir Way visitors citing health and exercise as a motivation for their visit is, however, higher than the proportion of outdoor visitors mentioning this reason in SPANS.

Only a small proportion of John Muir Way visitors cited completing a section of the route (2%) or the whole John Muir Way (1%) as reasons for visiting. It is important to note, however, that this question was unprompted and that a larger proportion of respondents were completing a section of the path or the whole path (see Section 3.5); it would appear that other motivations, such as exercise and scenery, were more top of mind for these visitors.

It is encouraging to note that, despite the route being newly branded, there is evidence of people taking part in charity events, particularly among non-local users. Further analysis shows non-locals were also more motivated to visit for health and exercise, to relax and unwind or to take part in a hobby, suggesting a more *destination* type of visit, whereas local visitors were more motivated to exercise a dog suggesting a more *everyday* type of use of the path, although obviously this still delivers both mental and physical health benefits.

Variations in motivations between population groups included:

- As already mentioned, females were more likely than males to visit the path to walk a dog (50% vs. 33%), and, given the everyday nature of dog walking, were more likely to be repeat visitors (45% vs. 7% first visitors)
- Male path users were more likely to visit the path to enjoy the scenery than females (24% vs. 16%).
- Path users in the C2DE social grade were more likely to visit to relax and unwind compared to path users in the ABC1 social grade (25% vs. 15%).
- Despite the low number of mentions, first time visitors were more likely to say they were motivated to visit 'to complete a section of the John Muir Way (9% vs 1% repeat visitor) or to 'generally challenge themselves' (7% vs 1%).

As highlighted in Table 5.1 there were some variations by area in motivation to visit; path users in the Helensburgh/Strathblane/Kilsyth section were more likely to visit for health and exercise (76%) and were least likely to be motivated to exercise a dog (22%). Visitors in Craigmarloch/ Bonnybridge were more likely to be visiting to take part in a sport or a hobby (15%) and to relax and unwind (25%), and visitors in Brunstane Burn/ North Berwick/ Dunbar/ East Linton were more likely to be completing part/the whole of the John Muir Way (7%).

*Table 5.1. Table showing motivations to visit JMW by location*

	Helensburgh/ Strathblane/Kilsyth	Craigmarloch/ Bonnybridge	Bo'ness/ Blackness/ Dalmeny	Brunstane Burn/ N Berwick/ Dunbar/ E Linton
For health/ exercise	76%	53%	61%	56%
To exercise a dog	22%	45%	41%	50%
Enjoy scenery	31%	16%	25%	15%
For fresh air	22%	20%	20%	20%
To relax and unwind	19%	25%	12%	25%
For peace and quiet	16%	21%	14%	16%
To take part in a sport or hobby	4%	15%	1%	4%
Spend time with family/friends	6%	8%	6%	7%
To be somewhere I like	2%	7%	3%	9%
Part of my trip to complete whole JMW / section	2%	5%	1%	7%

## 5.4 Transport

Driving was the form of transport used most frequently to reach the path, with just under half of John Muir Way visitors using a car/van to reach their starting point (45%, increasing to 58% among non-local people). Just under a third of visitors walked to their starting point (29%, increasing to 34% among local people), a fifth cycled (20%, fairly evenly split among local and non-local people) and 4% used some form of public transportation (10% of non-local vs. 3% of local people).

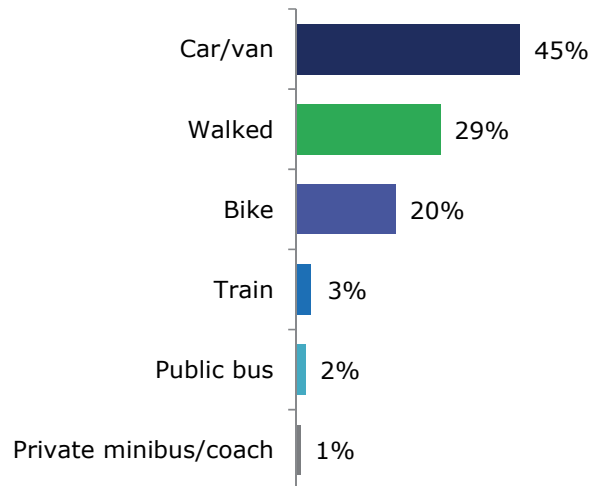


Figure 5.6. Mode of transport to reach the JMW (Base = All respondents - 537)

Variations in distances travelled and modes of transport used to reach the path included:

- Females were more likely to reach the path by car/van (53% vs. 40% of males) and by walking (35% vs. 25% of males).
- Males were much more likely to cycle to the path (28% vs. 7% of females).
- Visitors using public transport were more likely to be completing the whole path (9% vs. 3% of those not planning to), spending 3+ hours on the path (13% vs. 2% of those spending <3 hours) and/or to be on their first visit (13% vs. 3% of repeat visitors).
- A higher proportion of visitors interviewed in the Craigmarloch/Bonnybridge location drove to their start point (63%).
- A higher proportion of visitors in the Brunstane Burn/North Berwick/Dunbar/East Linton location walked to their start point (47%).
- A higher proportion of visitors in the Helensburgh/Strathblane/Kilsyth location cycled to their start point (39%).

The mode of transport used whilst on the path was also recorded. Walking was the principal activity on the path (75%), whilst a quarter of visitors cycled (24%). A very small proportion of visitors (less than 0.5%) were on horseback.

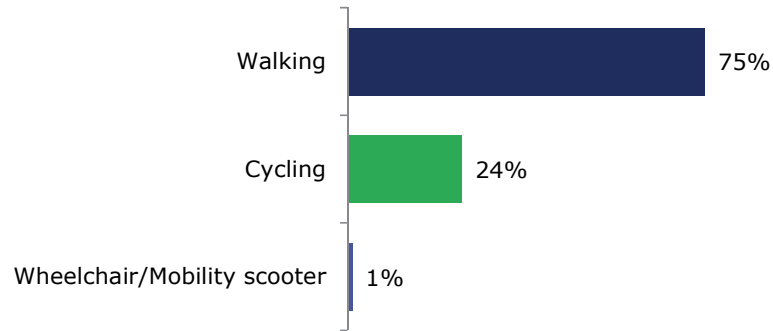


Figure 5.7. Mode of transport used on the JMW (Base = All respondents - 537)

As previously stated, females were more likely to be walking on the path compared to males (90% vs. 64%) and males were more likely than females to be cycling (34% vs. 9%).

Again there were some seasonal variations, with a higher proportion of cyclists recorded in the milder weather of spring/summer/autumn (25% vs. 13% in winter).

Compared to the total, visitors interviewed in the Helensburgh/Strathblane/Kilsyth location were less likely to be walking on the path (47% vs. 75% overall) and more likely to be cycling (42% vs. 24% overall). As shown previously, they were also more likely to have cycled to the start point of their visit and/or to be aware that they were on the John Muir Way.

### 5.5 Distance travelled

The distance travelled to reach the John Muir Way was also captured in the visitor survey. As shown in Figure 5.8, almost half of path users were local, with 48% travelling less than 2 miles from their home to reach the path. A quarter (25%) had travelled 2-5 miles and a fifth (20%) between 6-20 miles. A much smaller proportion were visiting from over 40 miles away (3%).

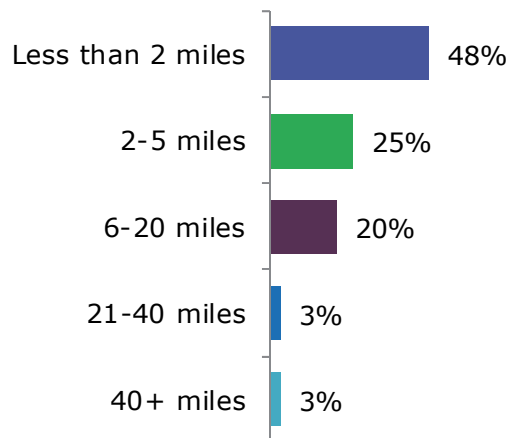


Figure 5.8. Distance travelled to reach the JMW (Base = All respondents - 537)

There were some seasonal variations, with respondents more likely to be from further afield as the year progressed and the weather became milder and days longer:

- There was a higher proportion of visitors from within two miles of the path in winter (61% compared to 46% in spring/summer/autumn).

- There was a higher proportion of path users visiting from 6-20 miles away in spring (26% compared to 12% in winter).
- There was a higher proportion of path users visiting from 40+ miles away in summer/autumn (4% compared to less than 0.5% in waves 1 and 2)
- Females were more likely than males to live within 5 miles of the path (80% vs 70%)
- Males were more likely than females to live 40+ miles away (4% vs. 1%)

By location, a higher proportion of visitors in the Brunstane Burn/North Berwick/Dunbar/East Linton area travelled less than two miles to their starting point (62%).

## 5.6 Navigational aids

Among all visitors to the path, 10% (an estimated 24,000 to 30,000 visits) used some form of navigational aid. Bearing in mind that some respondents used more than one type of navigational aid, this consisted of:

- 4% using a GPS device;
- 2% using a map of the John Muir Way printed from the website;
- 2% using an Ordnance Survey map;
- 1% using a John Muir Way map from a guidebook;
- 1% using the sign-posting provided along the route;
- 1% using another map;
- 1% using a smartphone/tablet app;
- <0.5% using a compass.

Visitors using any form of navigational aid were more likely to be:

- Non-local visitors (19% vs. 4% of local visitors);
- In the ABC1 social grade (14% vs. 4% of those in the C2DE social grade);
- Cycling (20% vs. 7% of those walking);
- First time visitors (39% vs. 6% of repeat visitors);
- those planning to complete the whole route (22% vs. 8% of those not planning to);
- Those spending 3+ hours on the path (27% vs. 6% of those spending <3 hours).

## 5.7 Expenditure

To provide an indication of the potential economic benefits of the route, respondents were also asked about the money they had spent during their visit to the path. Please note that these questions refer to all money spent during their visit, which may include money spent on items used at other times (e.g. fuel) and cannot be attributed directly to the John Muir Way.

Over the whole year, three in ten visits included some form of expenditure (29%, increasing to 55% among non-locals), with the majority of expenditure in the food and drink category (24%). Among those who spent money, the average spend per visit was £17.98. Including those who spent nothing, the average spend per visit was £2.52. The proportions and categories of expenditure are shown in Figure 5.9 below.

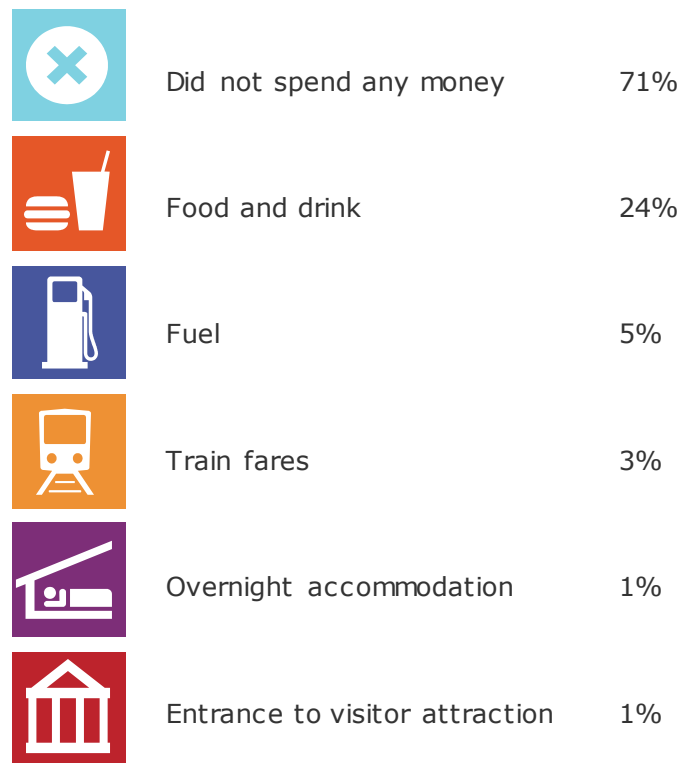


Figure 5.9. Proportion and categories of expenditure on the JMW (Base = All respondents - 537)

The overall expenditure level for visits on the John Muir Way is similar to that recorded for outdoor visits in general in the Scottish Recreation Survey (2012)<sup>7</sup> where three in ten visits involved some form of expenditure (30%). However, the ScRS recorded a higher mean spend per visit of £31 (£6.71 including those who spent nothing), while among the 29% who purchased something during their visit to the John Muir Way, the average (mean) spend was lower at £17.98 (£2.52 including those who spent nothing).

Variations were also recorded by previous visits and locality of resident. Those on their first visit to the path were more likely to have spent anything (59%) than repeat visitors (25%), as were non-locals (55%) compared to locals (22%).

Those interviewed in summer/autumn were more likely to have spent anything than those interviewed in winter (33% compared to 16%), while expenditure on fuel was also higher in spring/summer/autumn (6% compared to <1% in winter). This may be because respondents interviewed in summer/autumn were more likely to be staying away from home, to have travelled further, to be from outside of the UK and/or to be on a visit lasting 3 hours or more.

Visitors in the AB social grade were also more likely to spend any money (36% vs 22% of C2DEs) as were those who were cycling on the path compared to those who were walking (39% vs. 26%).

There was also a notable difference among those who were on the path for three or more hours, with this group more likely to have made any purchases (66% vs. 19% of those spending three hours or less on the path).

<sup>7</sup> ScRS 2012: <http://www.snh.gov.uk/docs/A1020956.pdf>

Those planning to complete the route were more likely to have made a purchase (42% vs 27% of those not planning to do so,) suggesting there is the potential to increase the positive economic impact to be gained by growing this market along with the non-local market.



## 6. THE JOHN MUIR WAY USER EXPERIENCE

### 6.1 Experiences of the John Muir Way

To assess the experience of path users, all respondents were asked how satisfied overall they were with their visit, as shown in Figure 6.1.



Figure 6.1. Overall satisfaction of JMW (Base = All respondents - 537)

A very high proportion of visitors rated their visit positively, with over 8 in 10 either 'very' or 'extremely' satisfied. Only a very small proportion was 'not very' or 'not at all' satisfied (2%). Respondents interviewed in Bo'ness/Blackness/Dalmeny had the highest rating of overall satisfaction with a mean score of 4.31 out of 5.

Respondents were also asked to rate the clarity of the sign-posting on the route, as shown in Figure 6.2.

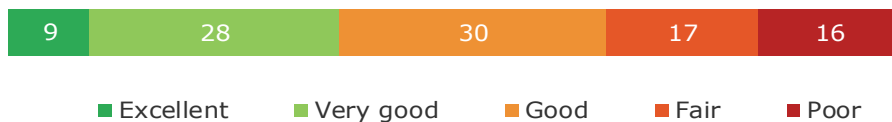


Figure 6.2. Ratings of clarity of sign-posting of JMW (Base = All respondents - 537)

Overall, two-thirds of visitors (66%) gave an 'excellent' or 'good' rating to the clarity of the sign-posting. Sixteen per cent gave a poor rating, increasing to 24% among non-local visitors. Visitors interviewed in the Helensburgh/Strathblane/Kilsyth area gave the lowest ratings to sign-posting with a mean score of only 2.52 out of 5.

As shown in Figure 6.3, when respondents were asked what they liked about the path, the most common response, given by over half of visitors (56%), was the variety of views, scenery and landscapes, followed by quality of the paths (33%) and the variety of the paths (16%). Other 'likes' mentioned were the quietness, availability of cycle routes, ease of access by car and the ease of access to towns, villages and tourist attractions.

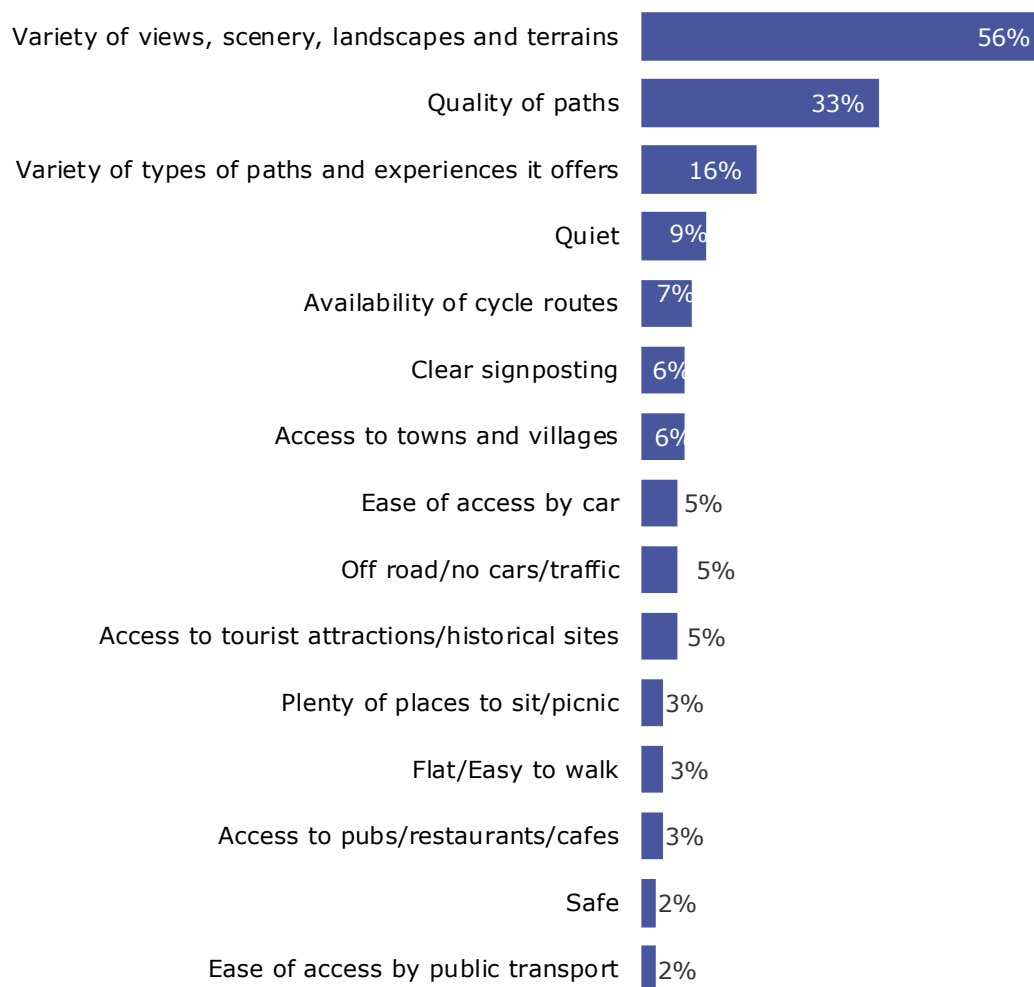


Figure 6.3. What path users liked about JMW (Base = All respondents - 537)

There were some variations by demographic group in terms of what visitors particularly liked, with males more likely to say they liked the availability of the cycle routes (8% vs. 4% of females), the access to towns and villages the path offers (8% vs. 1% of females) and the availability of places to sit/picnic (5% vs. 1% of females). There were few differences by age apart from those in the younger 16-34 age group who were more likely to say they liked the ease of access by car (11% vs. 3% among those aged 55+).

Unsurprisingly, cyclists were more likely than walkers to say they liked the availability of cycle routes (18% vs. 3%); they were also more likely than walkers to say they liked the access to towns and villages (10% vs. 4%), perhaps due to the higher proportion of cyclists using the path as an LDR rather than for local access. Conversely, walkers were more likely to say they liked the variety of views and scenery (59% vs. 47% of cyclists) and variety of types of paths and experiences (19% vs. 7% of cyclists).

Confirming the attractiveness of the John Muir Way as a long distance route, visitors who spent more than 3 hours on the path were more likely than those visiting for a shorter period to say they liked the access to tourist attractions and historical sites, access to towns and villages and access to pubs and restaurants. This could represent a further economic benefit opportunity for the John Muir Way with these visitors more likely to spend money during their visit.

Similarly, visitors who planned to but had not yet completed the whole route were more likely to say they liked the availability of cycle paths and access to tourist attractions compared to those who did not intend to complete the whole route (15% vs 4% and 11% vs 3% respectively).

As shown in Table 6.1, there were a few differences by location in terms of what visitors liked about the John Muir Way:

- A higher proportion of visitors interviewed in Bo'ness/ Blackness/ Dalmeny mentioned the variety of views and scenery, but a lower proportion mentioned access to towns, clear signposting or access to pubs and cafes. Around three-quarters of these visitors were on a visit of less than 3 hours in duration (78%).
- A lower proportion of users interviewed in Helensburgh/ Strathblane/Kilsyth mentioned the variety of paths as something they particularly liked and a higher proportion mentioned the access to towns and villages.
- A high proportion of visitors in Craigmarloch/ Bonnybridge said they liked the access to tourist attractions, ease of access by car and having places to picnic.

*Table 6.1. Aspects visitors liked about JMW by area*

	Helensburgh/ Strathblane/ Kilsyth	Craigmarloch/ Bonnybridge	Bo'ness/ Blackness/ Dalmeny	Brunstane Burn/ N Berwick/ Dunbar/ E Linton
Variety of views, scenery, landscapes	46%	38%	71%	54%
Quality of paths	35%	39%	29%	31%
Variety of paths and experiences	6%	26%	15%	18%
Access to towns and villages	10%	11%	1%	5%
Access to tourist attractions	5%	12%	2%	3%
Clear signposting	5%	12%	2%	9%
Availability of cycle routes	4%	7%	6%	10%
Ease of access by car	4%	13%	3%	4%
Access to pubs, cafes, restaurants	4%	1%	1%	5%
Places to picnic	3%	7%	2%	2%

All visitors to the path were also asked what improvements, if any, they would recommend for the path. These results are shown in in Figure 6.4.

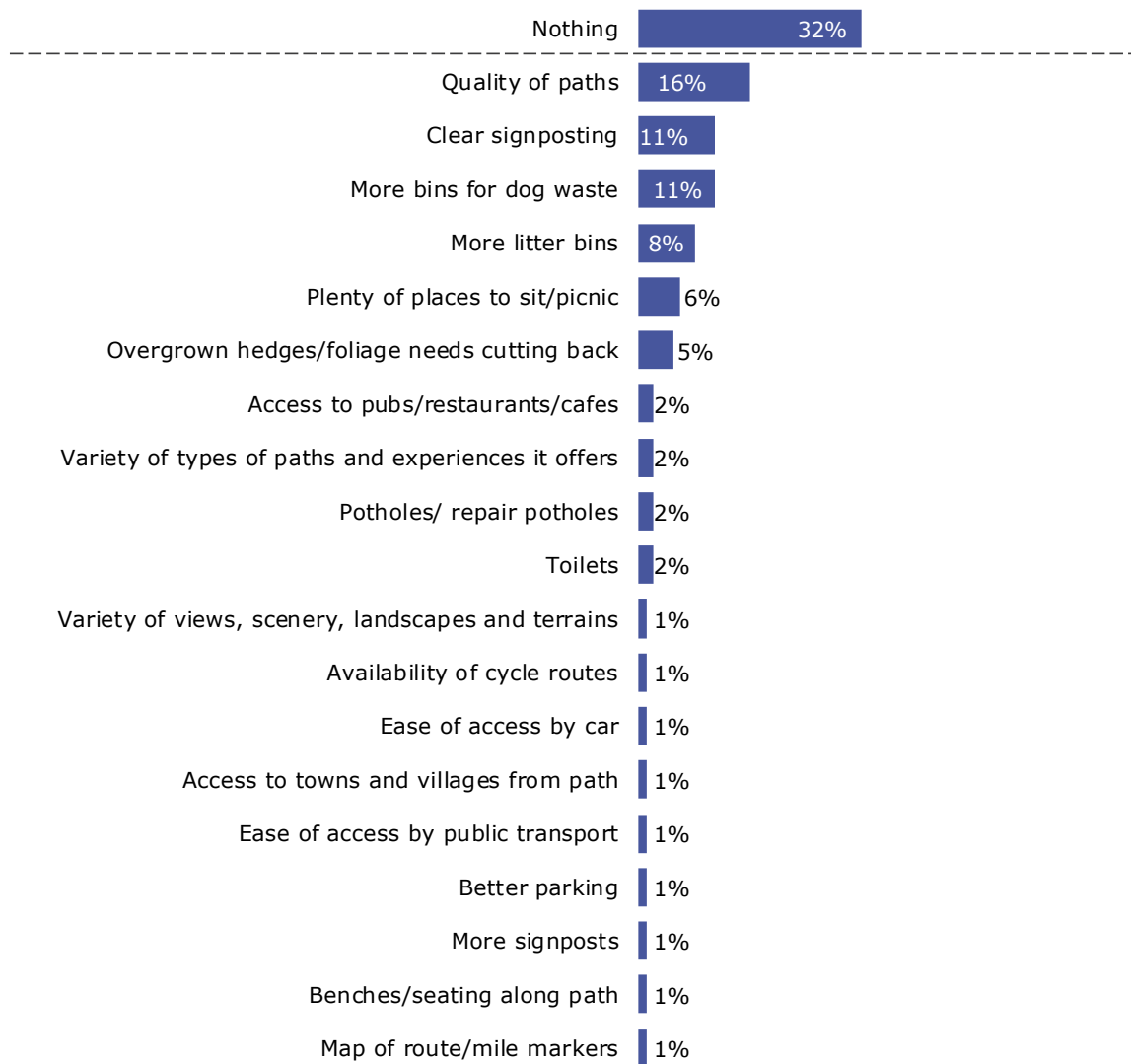


Figure 6.4. Improvements to JMW (Base = All respondents - 537)

Around a third (32%) of respondents thought no improvements were required. Improvements cited by other users included improving the quality of the paths (mentioned by 16%), clearer sign posting (11%, increasing to 18% among non-local people), more bins for dog waste (11%) and more places to sit/picnic (6%).

Male visitors and cyclists were more likely to suggest that the quality of the paths should be improved (20% and 30% respectively) while walkers were more likely to suggest more bins for dog waste (14%).

Visitors who had walked or planned to walk the entire route were also more likely to suggest that the quality of paths needed improved and that signposting should be clearer.

By location, a higher proportion of visitors in Helensburgh/ Strathblane/Kilsyth and Craigmarloch/ Bonnybridge said they would like to see an improvement in the quality of paths and clearer signposting.

## 7. AWARENESS & USAGE OF OTHER LONG DISTANCE ROUTES

Respondents were also asked if they were aware of any other Long Distance Routes (LDRs) in Scotland and if they had previously used any other routes.

### 7.1 Awareness of other Long Distance Routes

As shown in Figure 7.1, around two thirds of visitors on the John Muir Way were also aware of the West Highland Way (mentioned by 69% of all respondents). Other routes mentioned, albeit by significantly fewer respondents, included the Southern Upland Way (22%), the Forth and Clyde Canal (18%), the Fife Coastal Path (16%) and the Union Canal (14%).

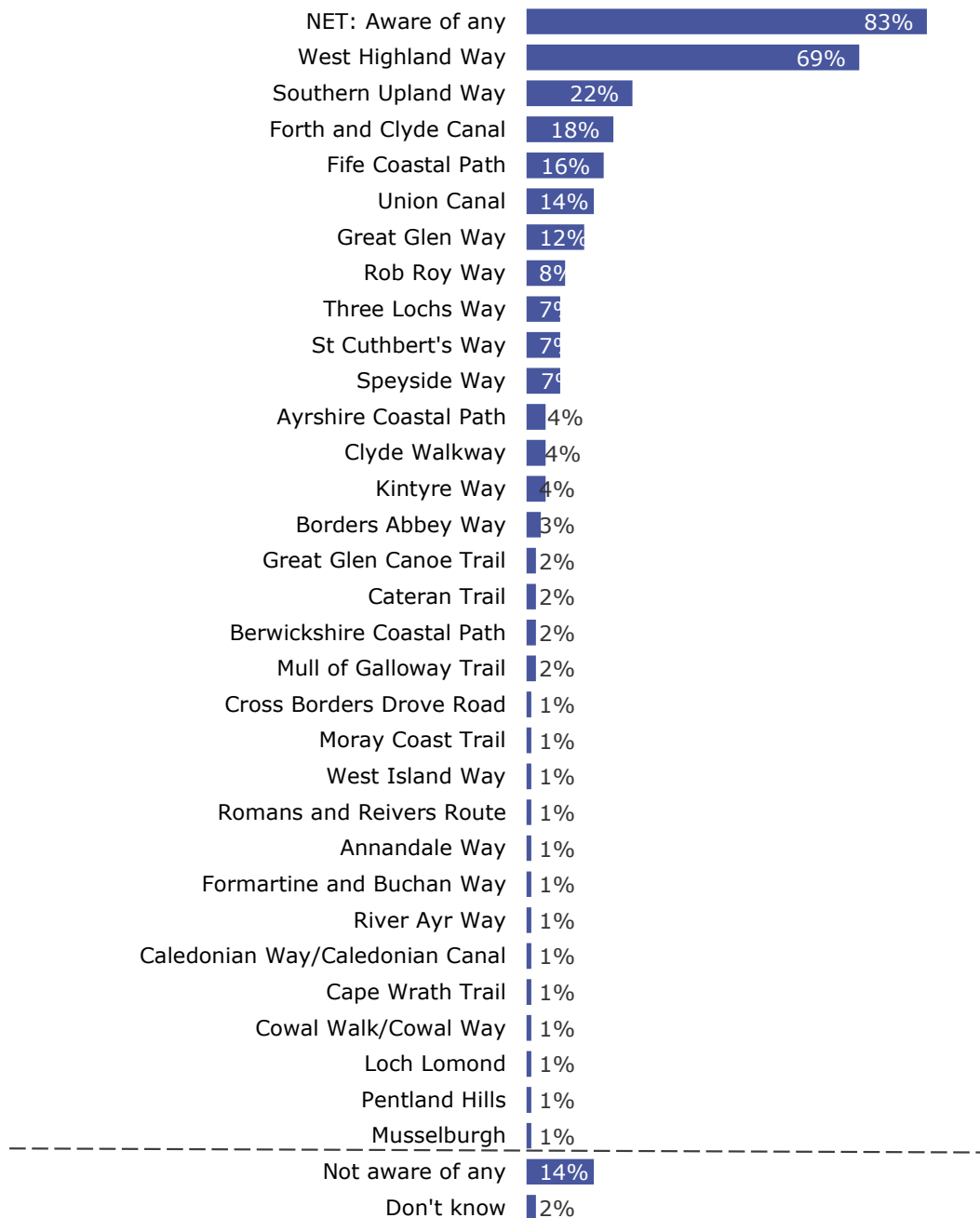


Figure 7.1. Awareness of other long distance routes in Scotland (Base = All respondents - 537)

Visitors aged 35 and over were more likely to be aware of other LDRs (87% vs. 62% of 16-34 year olds), as were those who were repeat visitors to the John Muir Way (86% vs. 68% of first time visitors).

Awareness of other LDRs was also higher amongst those who were aware that they were on the John Muir Way (88% v 78% who were unaware).

## 7.2 Other Long Distance Routes Used

The proportions of all respondents who had used the other LDRs at any point are shown in Figure 7.2 below.

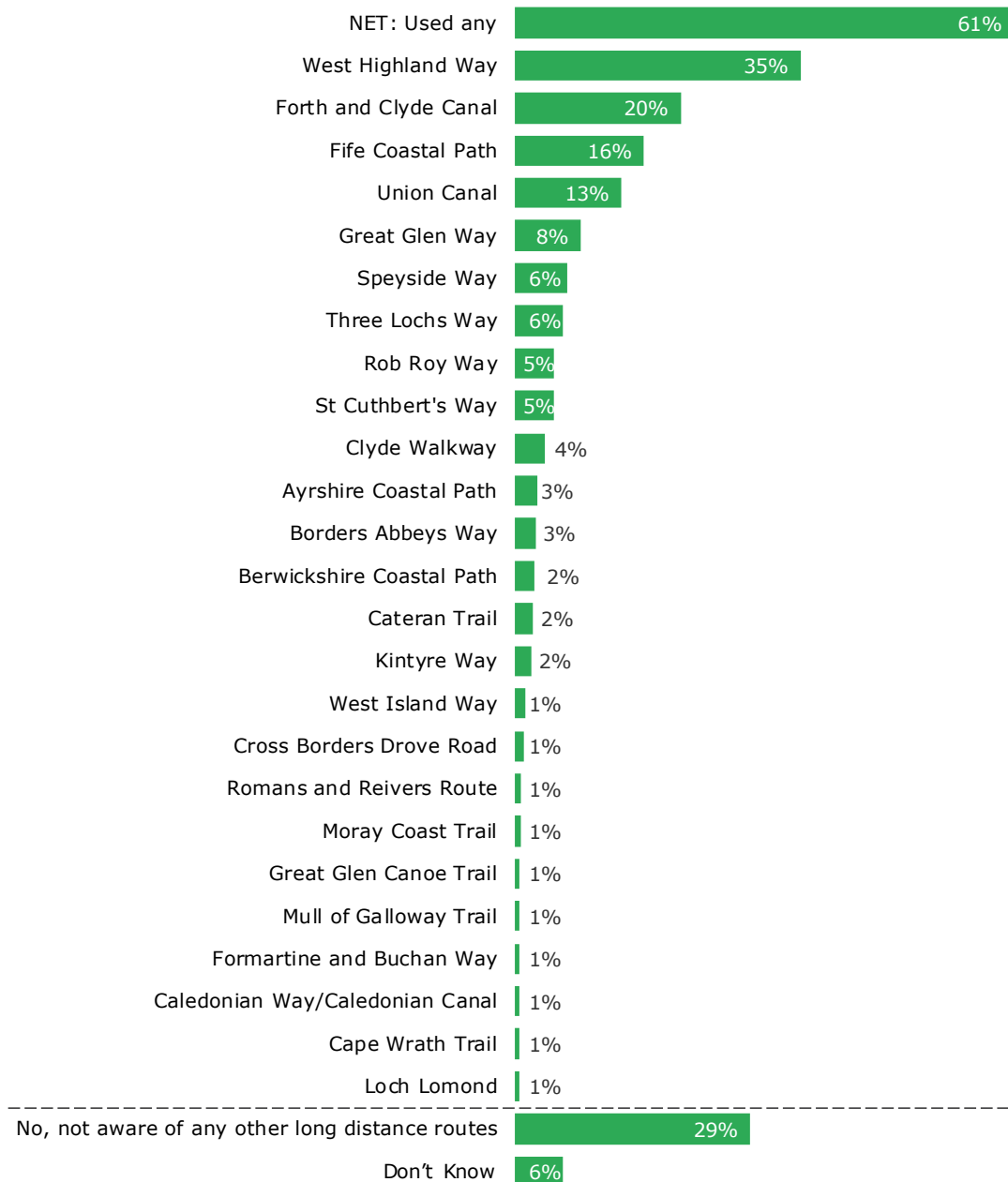


Figure 7.2. Use of other long distance routes in Scotland (Base = All respondents - 537)

The pattern of response regarding other LDR use was very similar to that for awareness of LDRs, with the West Highland Way recording the highest level of use (at 35% of all respondents), followed by the Forth and Clyde Canal (20%) and the Fife Coastal Path (16%).

### 7.3 Awareness of Scotland's Great Trails

Among all visitors to the John Muir Way, 33% were aware of the Scotland's Great Trails brand name (Figure 7.3).

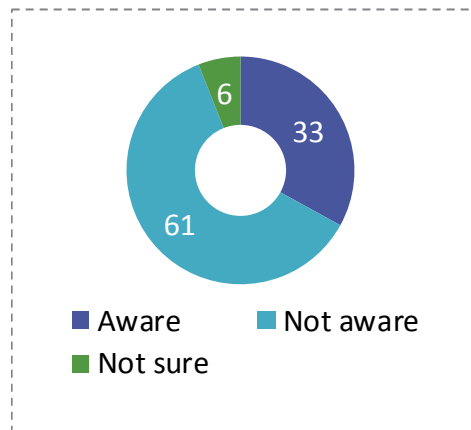


Figure 7.3. Awareness of Scotland's Great Trails (Base = All respondents - 537)

Awareness of Scotland's Great Trails was higher among males (37% vs. 28% of females), those aged 55+ (39% vs. 28% of 16-54 year olds) and those cycling on the John Muir Way (40% vs. 31% of walkers).

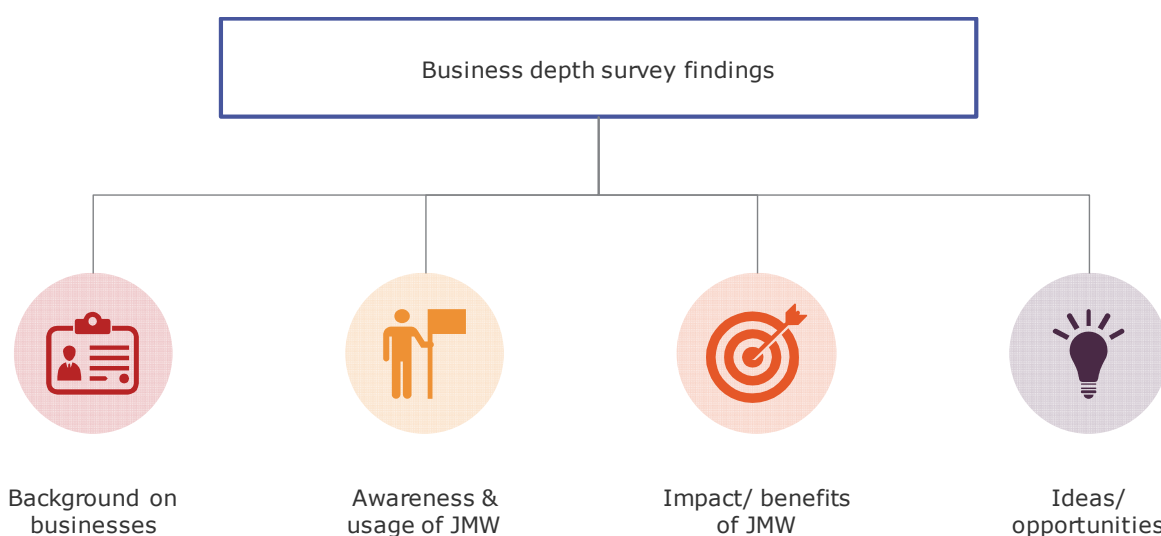
Higher levels of awareness of Scotland's Great Trails were recorded in spring and summer/autumn compared to winter (36% and 34% aware compared to 21% aware).

## 8. BUSINESS PERSEPECTIVES

This section presents the findings from the depth interviews undertaken with businesses on or near the John Muir Way. As outlined previously (see section 2.6), a series of 16 telephone interviews were undertaken to assess the impact of the path on businesses and to explore the ways in which potential economic benefits could be maximised.

A discussion guide was used as a basis for undertaking these interviews. This provided structure to the interviews by outlining the topics to be covered while providing flexibility as to the order in which they were covered and allowing the discussion to flow more naturally. A copy of the discussion guide can be found in Annex 3.

For the purpose of this report, the interview findings have been grouped into the following subject areas:



*Figure 8.1. Analysis subject areas*

### 8.1 Background on businesses

The participants covered a range of sectors or areas of business. However, during the analysis, two broad categories of businesses emerged – those with a direct link or clear ability to see benefits from the path and those with a less clear connection or who perceived there to be less potential for their business to benefit from the path. This does not mean that the businesses in each group were uniform, but defining these categories upfront is helpful as distinctions were evident between the two for a number of the topics covered by the research.

#### **1** Direct/ clear benefit

Businesses in this category include those with a product or service directly connected to the John Muir Way and/or who had proactively sought to benefit from their connection to the path. In general, these businesses tended to be proactive in developing new products or services and also in their efforts to market their business.



Several were members of local business associations and/or worked closely with other businesses. For some, the business itself and/or products/ services offered were relatively new, particularly those directly marketed around or created for users of the John Muir Way.

The businesses in this category include providers of holidays for long-distance walkers, those who provided other services (e.g. baggage services or bike hire), John Muir Way merchandise and museums/ attractions.

## 2

### Indirect/ secondary benefit

Businesses in this category have generally perceived less of a benefit from the John Muir Way and/or have been less involved in actively seeking to gain benefit from the path. These businesses offer more general, less niche products or services – ones that are not so closely connected with the path, such as cafes and accommodation services.

These businesses tended to have been established for longer, often with a sizeable proportion of repeat or steady business. Levels of marketing activity and involvement with other businesses/ associations were typically lower than the other category and several expressed a lack of clarity as to the best ways in which to market their business.

The businesses included in this category include accommodation providers, cafés/ restaurants and bicycle repair shops.

#### 8.1.1 Marketing efforts

While the approach of individual businesses towards marketing does vary, a distinction was noted between the two categories defined in this report in relation to the level and type of marketing undertaken.

Overall, those in the *indirect/secondary* benefit group participated in lower levels of marketing, mainly relying on their own website, word of mouth and repeat trade. The sentiment amongst these businesses was that they were keen to market their business, however, this was often seen as a lower immediate necessity and therefore, other requirements of running a business became more of a priority. A lack of knowledge about how to market was cited on a number of occasions – a greater understanding and easier access to assistance may mean a greater level of participation in marketing efforts amongst these businesses, in general and in relation to the John Muir Way.

While use of a company website and reliance on repeat business were also a characteristic of the *direct/ clear benefit* group, there was generally a higher level of proactivity with regards to marketing and business development. A number of these businesses featured on other relevant websites as well as their own and several were in contact with other businesses. For example, holiday providers were in touch with guidebook providers and baggage operators were in touch with accommodation providers etc. Other initiatives undertaken included involvement with local events, customer newsletters, connections with Tourist Boards, attendance at meetings and membership of business associations.

Across both business categories, several businesses expressed a hesitation to spend money on marketing when they were unsure of where to spend it and of the return that it would bring them.

### KEY FINDINGS – BACKGROUND ON BUSINESSES

- The analysis found different business approaches amongst participants, often dependent on the product/ serviced offered.
- The more niche/ targeted the offer, the more effort tended to be needed or put in.
- Variations were found for two broad groups – *Direct/ clear benefit* and *Indirect/ secondary* businesses.
- Marketing efforts and knowledge vary. In general, more support and advice would be welcomed.
- There is a hesitancy to spend money and time when unsure of the return or where to target resources.

## 8.2 Awareness and usage of the John Muir Way

### 8.2.1 Businesses

All of the businesses involved in the research were aware of the John Muir Way and that their business was either located close to the path and/or connected in some way with it.

*Direct/ clear benefit* businesses had a greater level of knowledge of the path and in several cases, of John Muir himself. For many, there was a personal interest in the path or John Muir's life but for several, a comprehensive knowledge of the path was also required to meet a direct business need. Without detailed knowledge of the path, many businesses in this category would not have been able to offer products to a sufficiently high standard or that were fit for purpose. Many prided themselves on providing their customers with detailed and accurate information, as well as with services that took into account their needs and the nature of the path being used.

For *indirect/ secondary benefit* businesses, a detailed knowledge of the path or John Muir was less central to the success of their business. Several had used sections of the path but none had walked/ cycled it in its entirety and some had not visited at all. This low level of usage was primarily attributed to a lack of time and also to a less pressing need to know a great deal about the path in order to provide the products and services their customers were looking for. Businesses in this group were less confident in identifying customers who were users of the path and in stating the level of impact they felt it had on their business.

### 8.2.2 Perceptions of awareness amongst users

The general feeling among the businesses interviewed was that a significant proportion of path users, particularly those from Scotland and elsewhere in the UK, had a fairly low level of understanding of who John Muir was and the significance of naming a path after him. They perceived that awareness was much higher in the United States and it was felt by most businesses that there was a great deal of potential to promote the John Muir Way to the American market. The feeling was that, at present, there is greater awareness and resonance amongst this market of John Muir and the work that he did.

Several of the *direct/ clear impact* businesses commented that a higher proportion of customers for products/ services connected to the John Muir Way were from the United States than for other products that they offered. For example, one holiday operator estimated that 50%-60% of their John Muir Way customers were from America, while a higher proportion of bags transported were for American path users than was the case for other LDRs such as the West Highland Way. Several cited anecdotal evidence of demand

amongst this market including customers who stated that they had visited as a direct result of the link with John Muir's name. Others commented that Internet searches for the John Muir Trail in America had led to visitors coming to Scotland for the John Muir Way and that sales merchandise, such as the official tartan, was doing well overseas.

### 8.2.3 Accessibility

A perception raised by several businesses (across the two categories) was that the John Muir Way experience and feedback had generally been more positive for walkers than for cyclists. Signage was mentioned as a potential issue for cyclists, as was the fact that sections of the route are off-road. While this will be a positive for some cyclists, some respondents suggested that cyclists wishing to complete the whole route might be deterred by the fact that the route isn't completely on-road and that could limit its potential use for events such as charity cycle rides.

On the other hand, the accessibility of the route was seen as a positive in many cases. The ability to access the route easily from urban areas in several locations and the centrality of the route mean that it is not just seen as the preserve of 'serious walkers/cyclists' – it is possible to complete sections with relative ease. However, the greatest economic benefit was thought to come from those completing several sections or the whole route.

#### KEY FINDINGS – AWARENESS AND USAGE

- All were familiar with the name and knew about the path.
- Beyond that, awareness and usage was variable. It tended to be higher amongst those who needed to know more for their product/ service to succeed or meet their customer needs.
- There was a perception of low levels of awareness of John Muir in domestic markets – much more resonance in the US.
- The centrality and accessibility of the path were seen as positive for encouraging more people to use it.
- However, portions of the cycling provision are off-road which may not appeal to some long-distance cyclists.

### 8.3 Impact/ benefits of the John Muir Way

Across both categories, the majority of respondents felt that it was relatively 'early days' for the John Muir Way and that there was the potential for a greater impact to be felt by businesses in the future.

Those in the *indirect/ secondary benefit* category were less clear on the impact to date of the John Muir Way on their business, as well as on the potential future benefit. Several were aware of path users having used their products or services, however, in general, the perception was that this ranged from 'very limited' to 'a few'.

Despite being the businesses that other participants frequently cited as having the potential to benefit, cafés, restaurants and accommodation providers were unsure as to ways in which they could benefit more in future. For these businesses, the financial benefit of path users as customers could be relatively small and for accommodation providers, having single night guests often incurred both more work and cost than those who stay for longer.

*Direct/ clear benefit* businesses were, for the most part, more optimistic about the future benefits of the path and also often more confident in stating that there had been an impact to date on their business. The message from these businesses was that the signs from the first 12 to 18 months of the route being open were that things were off to a positive start. Compared to other LDRs, it was felt that the John Muir Way had been very successful, with demand exceeding expectation in a number of cases, particularly those with a product or service that was directly created or targeted at path users.

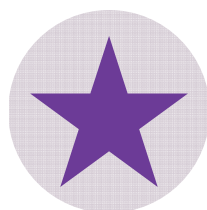
In general, there was a perception amongst businesses that it was those located on or near the Eastern end of the route that had seen the greatest benefit, particularly those closer to Dunbar.

#### KEY FINDINGS – IMPACT/ BENEFITS

- There was a feeling of it being ‘early days’ but with potential for greater impact in the future.
- Indirect/ secondary benefit businesses were less clear on the impact. Others were more optimistic and confident in stating that benefits had been felt.
- There was a feeling amongst cafés, restaurants and some accommodation providers that the financial benefit could be relatively small, particularly against the amount of work involved.

#### 8.4 Ideas/ opportunities

In addition to looking at the impact the John Muir Way has had so far on businesses, those who participated in the research were asked for their thoughts on ways in which the path could be utilised in the future to bring economic benefit to businesses. A number of suggestions were made which have been grouped into the following categories:



##### Marketing & promotion

In addition to capitalising on the interest and connection with the American market, it was felt that raising the profile of John Muir and the path within the Central Belt and also further afield in Scotland would be beneficial, with suggestions including:

- Undertaking initiatives with local schools which could be linked in with the path, for example, around health, wellbeing and the outdoors;
- Participation in other local community events;
- Scheduling dedicated events around significant dates such as John Muir’s birthday;
- Linking with charities to set up charity walks/ bike rides along the path;
- Linking in with public transport providers to emphasise the ability to reach sections of the path easily, affordably and with a reduced impact on the environment.

Another suggestion involved the creation of itineraries targeted at particular groups, for example, families where children could be given a list of plants/ animals/ landmarks to look out for or for ‘adventurers’ where additional opportunities to explore areas close to the path could be highlighted.

The use of social media was also cited as a way to raise the profile of the path. Ideas included setting up a blog, or several blogs, where people who have walked or cycled the path could document their experiences. Some businesses were aware of customers who uploaded information and pictures of their visits to the path on social media. Users could be encouraged to link in with a Facebook page, Twitter or Instagram account, for example in literature about the path, on websites and via other relevant accounts e.g. walkers'/ cycling associations.

Where these types of activities are already taking place, businesses would like to be kept informed so that they can also promote events, participate in initiatives and/or make use of information that is already available. They would also like to know of any new information, changes or developments that relate to the path, particularly those who provide information on the path to their customers.



#### Information & resources

Several participants raised the potential for more centralised marketing of the John Muir Way – a central 'hub' for information and resources. There was not a great deal of awareness amongst participants of activity to promote the path beyond the official launch. Where such activities are taking place, businesses are keen to be kept informed and offered the chance to assist where possible.

On the path itself, several businesses were aware of feedback regarding a lack of signage or signs not being obvious, particularly for cyclists, which could affect word of mouth recommendations. Another suggestion was to include more interpretation on the path to raise visitor awareness of the path's name and significance. The placement and volume of interpretation boards would, of course, have to be undertaken in a way that would avoid detracting from visitors' experience.

As well as signage on the path, it was suggested that more signs highlighting local businesses or amenities would be beneficial. Such signs could include an indication of how close these are to the path so that users know that accessing these amenities will not take them too far off the route. In addition, advertising the path/ providing leaflets to other businesses in local towns/ villages (e.g. newsagents, supermarkets) was felt to be a beneficial step that could be taken.



#### Collaboration & development

Collaboration in the promotion of the John Muir Way to enable businesses to take advantage of the opportunities on offer was a reoccurring theme in the suggestions given. In general, participants appreciated opportunities to network with other businesses through groups such as local business associations, although current participation in such fora was reported amongst the *direct/clear benefits* category businesses. Learning from the successes and initiatives undertaken by other businesses would also be welcomed.

Businesses were keen to work with SNH and other partners (for example, Local Authorities) involved in managing/ promoting the path as closely as possible. Information provision, as mentioned earlier, was a key area of interest for businesses with several keen to receive guidance and where possible, resources to assist in making the most of the opportunities that the path offers.

A scheme mentioned by several businesses was the walkers and cyclists welcome scheme. Encouraging businesses to participate in the scheme or to make it clear to walkers and cyclists that they were welcome was felt to be a way in which users of the path could be encouraged to spend money along the route. Some suggested that offering businesses tips on how to accommodate path users, for example by providing the means to fill water bottles or dog bowls outside of catering facilities, would be another way in which to let path users know that they were welcome and to encourage greater levels of business.

The opportunity to link the John Muir Way with other routes and LDRs was also identified. For example, the '3 lochs walk' incorporates part of the path between Helensburgh and Balloch and certain businesses were looking at ways to incorporate this into packages that they offer. This could be used to raise awareness of the path amongst users of other LDRs.

#### KEY FINDINGS – IDEAS/ OPPORTUNITIES

- In addition to capitalising on interest in the US, several suggestions were raised for increasing the profile of the path more locally – from local events to blogs, use of social media and targeted itineraries.
- There is a keen interest on collaboration (between business and other groups such as Local Authorities) and on being kept informed.
- Other suggestions included improved signage and some interpretation on the path, as well as signs directing users to local businesses.

## 8.5 Summary and next steps

The key areas that emerged from the business research and potential next steps associated with each are summarised below.

### 8.5.1 *Assisting businesses/ the impact of the John Muir Way*

A distinction was evident between businesses with a clear, direct link to the John Muir Way and those with a less direct connection. Those who marketed a product or service to path users tended to offer more niche services and many were, by necessity, more knowledgeable about the path. They also tended to be more proactive in their marketing efforts, both in relation to the John Muir Way and more generally. Those in the other category had less of a pressing need to be as knowledgeable about the path and also tended to have a wider customer base. A commonality across both groups, however, was an interest in marketing advice and a hesitation to spend money/ time where a return was not certain.

Across all businesses, there was a sense that it was 'early days' for the path, with varying views as to the potential benefits that the path could offer in the future. Indirect/ secondary benefit businesses were less clear on what opportunities exist and also on how beneficial it could be for their businesses i.e. are the benefits of attracting more John Muir Way users outweighed by the amount of work required and/or a relatively low return. Those with a direct link/ clear benefits were more optimistic about the path's potential to benefit their businesses.

Actions:

- Communicate to businesses where they can turn to for advice and what is available to help them maximise the potential opportunities that the John Muir Way offers. Signposting wider business advice opportunities would also be useful.
- In particular, businesses with less of a direct link to the path would benefit from knowing more about the potential opportunities it can offer them, how to reach relevant customers and more about the significance of the path in general.
- Any efforts to raise the profile of businesses with path users would be welcomed. Suggestions included signposting on the path, where appropriate, pointing users towards local amenities.

### 8.5.2 Collaboration

The benefits of collaboration were raised on a number of occasions. These related to businesses communicating and working together, as well as wider collaboration with organisations such as SNH, CSGN, business associations, Local Authorities and local business forums. Sharing knowledge, experiences and looking for ways to work together would be welcomed by businesses.

Actions:

- Ensure that businesses are aware of where they can access information on the path, including any developments and key contacts they can get in touch with.
- Raise the profile of any centralised marketing resources that are available.
- Work with local business forums to increase interest in the path and the opportunities it presents, to maintain momentum and to encourage businesses to work together.
- Encourage businesses to be part of or follow the principles of the cyclists and walkers welcome scheme. This needs to be accompanied by a demonstration to businesses that there are benefits of accommodating path users, particularly amongst those with a wider customer base who may see this as an inconvenience with a limited return.

### 8.5.3 Path users

There was a general feeling that awareness of the path and indeed, of John Muir himself, was low in Scotland and the rest of the UK. Several participants commented that the link and level of awareness seemed to be stronger amongst visitors from the United States and that this market represents a real opportunity for the path and Scottish tourism overall.

Actions:

- Several ideas/ opportunities mentioned by businesses related to raising awareness of John Muir and the path amongst local and domestic markets. These included participating in local community events, setting up blogs, hosting charity walks/ bike rides and increased use of social media, as well as interpretation and clearer signage on the path itself.
- In addition, advertising on public transport could be used to raise the profile of the path within Central Scotland and to emphasise the accessibility of the path.
- Utilise the interest in John Muir that exists in the US market by linking in with websites, tour operators, interest groups/ associations and trails.

## 9. CONCLUSIONS

### Path awareness and usage

Sixty one per cent of visitors were aware they were on a named path and 49% were aware the path was called the John Muir Way. Awareness was higher at the start and end sections of the path. There is clearly an opportunity to increase name awareness; improved signposting, mentioned in both the user and business surveys as a potential area for improvement, may be one way of doing so.

Local business respondents made a number of suggestions for raising awareness of the path, including further capitalising on the interest in John Muir amongst the American market and boosting the profile of the path locally by hosting local events, online blogs, using social media and developing itineraries targeting specific groups.

The majority of visitors hadn't travelled far to get to the path and most (72%) said the fact that the path was part of the John Muir Way was 'of no importance' in their decision to visit (72%). Nevertheless, the path's location in central Scotland with access from urban areas, suggests the route has longer-term potential to attract visitors from further afield, as well as those who take longer visits, thereby increasing the potential economic benefit from the route.

General knowledge was the primary means by which visitors had found out about the path, reflecting the high proportion of local and repeat visitors. There is potential to increase usage of more 'formal' information sources, such as websites and printed materials, particularly amongst those who live further afield (8% of non-locals used the Internet compared to 2% of local visitors).

At present, the greatest interest in completing the whole of the John Muir Way comes from first-time visitors (24%) and those living more than 2 miles away from the path (23%), indicating that local, repeat use may be more functional in nature (dog walking, general health/ exercise).

### Profile of path users

The current age profile of John Muir Way users is biased towards older age groups. There is also more of a bias towards male users and those in the ABC1 social grades. A third of John Muir Way visitors (33%) compared to 19% of outdoor visitors in general were classed as people who 'seldom' visit the outdoors for leisure and recreation, highlighting the potential of the route to attract this hard to reach audience and encourage increased outdoor recreation participation in the future.

### The John Muir Way user experience

8 in 10 users were 'extremely/ very satisfied' with their John Muir Way experience, providing a strong foundation on which to build further awareness and satisfaction in the future.

Key attractions of the path included the variety of views, scenery and landscapes (56%), the quality of the path (33%) and the variety of types of paths and experiences available (16%).



In addition, visitors who spent more than 3 hours on the path (and more money) were more likely to say that they liked the access to tourist attractions, historical sites, towns, villages, pubs and restaurants, indicating longer term potential to reap economic benefits by growing this user group.

Signposting represents an area where there is potential for improvement, with a third of all visitors (33%) rating this as 'fair/ poor' and 24% of non-local visitors rating this as 'poor'. Small proportions mentioned other improvements when asked, including dog waste bins (11%) and more litter bins (8%). Although the quality of the paths was mentioned as something visitors liked, 16% felt that there was room for improvement. Those intending to walk the whole route were more likely to mention path quality and signposting as areas requiring improvement.

Signage was also highlighted in the business consultations as a potential area for improvement, both on the path and to direct users towards local towns, villages, amenities and attractions.



### **Visit characteristics**

Only 8% of visits included children, suggesting there is potential to attract more families to the path, particularly given its location in central Scotland and proximity to urban areas.

The John Muir Way offers a real opportunity to deliver health benefits, both physical and mental. Sixty one per cent of path users cited health or exercise as a reason for visiting, while others mentioned enjoying the scenery (22%), relaxation/ unwinding (19%) and/or peace and quiet (16%). Other draws include exercising a dog (40%) and enjoying fresh air/ pleasant weather (20%).

Overall, 29% of path users spent any money during their visit.<sup>8</sup> This was higher amongst first-time visitors (59%), non-locals (55%) and those on a visit lasting 3 hours or more in duration (66%). While encouraging local, repeat use is important for a number of other reasons, encouraging longer visits taken by those living further afield offers the greatest opportunity for economic benefit. The average amount spent by those who spent anything was around £18.



### **Benefitting local businesses**

Consultations with local businesses revealed that approaches to marketing in general and, in particular, to marketing aimed at benefitting from proximity to the John Muir Way, are variable. In general, the more niche or targeted a product/ service was (e.g. guided walks, maps, baggage services etc.), the more proactive efforts were, with businesses that had a more general customer base feeling that they had less time but also less of a requirement to actively market their business to John Muir Way users. All businesses, however, would value marketing support and guidance, as well as collaboration between businesses and with local authorities, in business forums etc.

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<sup>8</sup> Please note that these questions refer to all money spent during their visit, which may include money spent on items used at other times (e.g. fuel) and cannot be attributed directly to the John Muir Way.

Those who offered a service directly linked to the John Muir way were more likely to know more about the path, driven to a large extent by necessity but there was also a high level of personal interest. Although there was a general feeling of it being 'early days' for the John Muir Way, there was optimism, particularly amongst those with a clear link/ direct benefit, regarding the potential economic benefit of the path.

## 10. LDR RESEARCH – OBSERVATIONS & RECOMMENDATIONS

This research project not only provided the opportunity to collect key data on usage of and attitudes towards the John Muir Way but also helped assess how this kind of research could be undertaken for other Long Distance Routes (LDRs). In this section, the key considerations and lessons learned from undertaking this research are presented under the following headings:



Figure 10.1. Undertaking LDR research

### **Background**

- *A crucial stage in setting up any research programme is to understand both the wider context and the objectives for the research itself.*

In order to ensure that the research meets the needs of the client, it is important to understand the context surrounding the information needs and also the nature of the path itself. For those sourcing research services from an outside supplier, a clear brief is required, explaining why the research is being undertaken and how the research findings will be used.

The John Muir Way survey was commissioned to allow SNH and its partners to understand how visitors are using the route, to gauge levels of usage (visitor estimates) and to help assess the impacts of this long distance route. The survey data will be used by SNH to report to key interested parties (local authority partners, Sustrans, Central Scotland Green Network Trust and Scottish Government) and to inform thinking on developing a methodology to monitor usage of Scotland's Great Trails.

- *It is worth spending time looking at information that already exists*

Undertaking a review of existing relevant information will assist with the research design and will ensure that time isn't spent collecting information that already exists or that can be approximated from existing information. For example, is there existing data on volume of usage (e.g. counter data) that can inform potential sample sizes and also the selection of locations for interview?

Where an external agency is being commissioned to undertake the research, knowing what information is already available will be invaluable in ensuring that the research undertaken is fit for purpose. This includes learning from other similar surveys undertaken.

- *Understanding what you need to know directly impacts on the research design*

For the user survey, there were several key points that fed into the understanding of the route and the subsequent survey design:

- Information on the trail itself – when it was launched, location, why it was launched, publicity/ promotions undertaken to date;
- Any previous information that had been gathered – previous surveys but also estimates or counts of users. The latter was particularly beneficial in designing the survey approach and ensuring that the method would yield a sufficient sample for analysis;
- Who the end users of the survey data are and their stakeholders – who the results needed to be communicated to;
- The timeframe for the research;
- How the results would be used.

- *A mixed mode approach may be required to collect all of the required information*

For the John Muir Way research programme, a face-to-face survey of people on the path met the requirement to understand how visitors are using the path. To meet the other requirements of the survey, additional approaches were required. These included manual counts of users, undertaken on the path, which were used along with existing counter data to produce visitor estimates. In addition, a survey of businesses was undertaken to understand more about the economic benefits and potential of the path.



## **Approach**

- *Once commissioned, an initial set up meeting or call with all relevant parties provides clarification for the survey design and helps with key decisions such as selecting interview locations*

In this case of the John Muir Way study, the detailed knowledge of the route within the client team was central to selecting suitable points along the path that the research agency could then investigate as potential locations for interview and that would allow a mix of users (walkers, cyclists etc.) to be interviewed. The meeting was also an opportunity to go through maps of the different sections of the path.

- *A fundamental driver for the research design will be to determine when it is most suitable to undertake the research*

For LDR user surveys, face-to-face interviews on location as users are experiencing the path is likely to be the most suitable survey approach for a number of reasons:

- Identifying users by other means such as population surveys or relevant websites or organisations is likely to be time consuming and costly. It may also be difficult to source enough contacts for a sufficient sample for analysis;
- In addition, there are strict data protection and Market Research Society (MRS) guidelines around the use of an individual's contact details, meaning that existing databases may not be suitable for recruiting respondents;<sup>9</sup>
- Users are interviewed as they experience the path. Information collected after the visit becomes less reliable the longer it has been since the experience took place;
- It is easier to schedule interviews across a suitable period (e.g. over a calendar year) and to interview users at a variety of points along the route;
- LDRs often attract users from a range of places and countries of origin. Following up with interviews after the fact can become more complicated where several countries are involved and this can limit the methodologies available i.e. face-to-face interviews will not be possible and telephone surveying becomes more complex and expensive;
- Collecting contact details on location is a possibility, however, response rates for follow-up interviews mean that you would need to collect 3-4 times more contact details than your target survey sample;
- Contacting users after their visits would also make it harder to get a spread of users along the route and across the year.

When undertaking a business survey, a different approach is required. Respondent availability will be variable and it is important to demonstrate flexibility in when you undertake the research.

A telephone depth interview was selected as the most appropriate methodology for this element of the John Muir Way research programme. This allowed the flexibility required for fitting in with respondents and also reduced the costs and the time that would have been required to undertake these interviews face-to-face.

A more qualitative approach was also selected for the business depth interviews. This element of the research programme was very much focussed on perceptions and opinions rather than simply gathering facts. A qualitative approach allowed the structure of having certain areas of interest to work through whilst allowing the conversation to flow more naturally than a fully structured interview would allow. This was achieved by using a discussion guide which gave the interviews focus and a broad structure by outlining topic areas to be covered (see Annex 3).



## **Design & implementation**

- *Give careful consideration as to when interviews should take place to get a good spread of users*

In order to properly understand user experiences of an LDR, it is important that a variety of users are spoken to. This means that interviewing periods should be spread over different

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<sup>9</sup> <https://www.mrs.org.uk/>

days and times of the day. In addition, where possible, it is beneficial to allow for a seasonal spread of interviews – ideally over a 12 month period or at the very least, including a busier period (such as summer) and a quieter period (autumn/ winter).

Of course, the timing of interviews needs to be considered carefully. Hours of daylight are reduced during the autumn/ winter months and very quiet periods are likely to be less fruitful in terms of the number of interviews that can be achieved.

A number of other key points require to be borne in mind regarding the location of the path and the most suitable points for interview. The survey locations were chosen on the basis of several criteria including:

- The potential to interview a range of path users (walkers, cyclists, horse riders)
- A mix of urban and more rural locations
- That they were spaced out across the length of the route
- To ensure, as far as possible, that interviewers encountered users of the path rather than those using a section of the path to reach another path/ route.

Once the list of potential locations was identified, site visits were undertaken to assess their suitability. Photographs were taken and notes made on each location visited so that sufficient information could be passed on to allow interviewers to find the correct location. For the locations selected for inclusion in the survey, maps with specific directions were also created.

Having completed the site visits for the survey, a small number of locations were discounted on the basis of the remoteness of the location (and therefore, concerns for interviewer safety) and/or because the throughput of visitors was thought to be too low for a sufficient sample to be obtained at that location.

➤ *The survey approach should not compromise interviewer safety*

A crucial consideration in the selection of the John Muir Way user survey fieldwork locations was interviewer safety. Interviewers worked in the selected locations for several hours at a time and it was vital that they felt as safe as possible. The criteria assessed in regards to survey locations with regards to interviewers were:

- Accessibility – were there public transport options or was a car required? Was the location easy to find and identify? Was the path easy to reach from their parked car/ public transport drop off point?
- Mobile phone reception;
- Location and proximity of amenities including shelter in poor weather, toilets and shops;
- Whether the location was remote – was it reasonable to ask an interviewer to work there for several hours? Would they feel safe on their own or would they require someone else to work with them? If the location was very remote, would the number of users encountered be sufficient to warrant its inclusion in the survey;
- Seating and shelter available – both for the interviewer and the respondent while the interview was being conducted.

➤ *When selecting businesses to interview, it is worthwhile trying to get a range of businesses but it is also important to maintain flexibility with regards to the sample achieved*

For the John Muir Way business depths, the list of potential interviewees was supplied by the client. Within this list, there were a range of types of businesses, from cafés/ restaurants to bike hire providers and museums/ attractions. Within these, the contacts were grouped by the client in terms of priority. These criteria were taken into account when arranging the appointments, however, it was also important that as many businesses as possible took part, therefore, these quotas were not strictly imposed.

- *Notification to businesses of the survey by the client/ an official and known organisation in advance gives the survey credibility and a greater level of success in arranging appointments*

Email notification of the survey was sent out by the client two weeks before calls were made to arrange appointments. This step gave validity to the agency undertaken the research and also meant that potential respondents were aware of the research when they were contacted by the agency to see if they would take part.

- *The questionnaire should be designed so that it collects the information you need to meet your research and wider business objectives*

There are several central points to bear in mind when deciding what information to collect during the interview:

- Is there information that would be 'nice to know' but that will not serve a concrete or central purpose and will take up valuable space that could be utilised to greater effect?
- Survey length is important – users will not want to be kept from their experience for too long and an excessively long interview is likely to put people off from participating;
- Question wording should be clear and not too lengthy – it is important that respondents are clear about what you are asking them. Face-to-face interviews do allow interviewers to provide clarification and to respond to non-verbal signals, however, the questions should be designed to be as clear and easy to understand as possible.

The John Muir Way survey interview collected information on the following subject areas (for a copy of the questionnaire used, see Annex 1):

- Demographic profile of users including age, gender, occupation of Chief Income Earner in household (for social grade classification);
  - Type of trip;
  - Party composition;
  - Visit motivations;
  - Expenditure during the visit;
  - Awareness of being on the John Muir Way and importance in decision to visit;
  - Transport used to reach the path and while on path;
  - Information sources, including the use of navigational aids;
  - Intentions to complete the entire route;
  - Likes and improvements;
  - Awareness and usage of other LDRs
- *When undertaking counts of users, the information required and level of detail needed should be considered*

When counting users, it is generally advised to keep things as straightforward as possible. While this may not cover every eventuality, this avoids overcomplicating the forms used (count sheets) and the analysis undertaken.

Counts of users should only be considered as an indication of levels of usage and not used or presented as definitive. There are many factors that can influence the number of users seen on a particular day including the weather, time of day, time of year etc. In addition, the counting may be undertaken during the same period as interviewing to save costs.

For the John Muir Way survey, the count sheet used (see Appendix 2) recorded the following detail:

- Weather conditions;
- Time period covered (including any breaks taken)
- Counts per party (and overall) of users on foot, on bicycles, on horseback and those in wheelchairs



## **Analysis & interpretation**

➤ *It is important to revisit the research objectives at the analysis stage*

Surveys can generate quite a volume of data and in order to ensure that the analysis and outputs produced from the study are fit for purpose and as beneficial as they can possibly be, it is important to revisit the research and wider business objectives. Doing so helps to structure how the data is investigated and provides stories or themes to work around.

As part of the proposal for the survey, several areas of interest were identified. As well as forming the basis for the survey approach and questionnaire design, these provided a structure for the analysis and the presentation of the data in this report. These were:

- Estimating the number of path users;
- Profiling users of the John Muir Way;
- Examining visit characteristics (type of trip, transport used, distance travelled etc.);
- Awareness and experiences of the path;
- Awareness and usage of other LDRs;
- Business perspectives on the benefits of the path.

➤ *Understanding how to analyse your data – quantitative data*

Surveys commissioned through research agencies will include the analysis of the survey data using data analysis software. The outputs of this analysis are typically data tables but can include files in formats such as SPSS (see later). By using these outputs, some of the analysis has already been done for you (e.g. percentages for sub-groups have been calculated).

If you do not have access to data analysis software or expertise, there are still ways you can analyse your data. At the most basic level, analysis of the survey results may involve a simple count of the number of respondents providing certain responses (a frequency count). However, there are other ways in which to investigate the data:

- *Percentages* – calculating results as percentages of the total sample can make results more meaningful and facilitates comparison with other surveys;
- *Averages* – when a question has collected numerical data such the amount of money spent during a visit, it can be useful to calculate the average response. Results for different groups of respondents or comparison with other surveys can then be made;



- *Rating scales* – the responses to rating scales can be analysed as either percentages (e.g. percentage who provide a ‘Very good’ rating) and/or average scores. Average scores are calculated by assigning a score to each of the possible responses (e.g. 1 for a response of ‘Very Poor’ and 5 for a response of ‘Very Good’) before calculating an average.

When interpreting expenditure data, it is important to be clear on what the data is telling you. The spend data collected through the John Muir Way survey is money spent during the visit as a whole. Without detailed questioning, it is not possible to say whether the money was spent as a result of visiting the John Muir Way or where exactly it was spent. For example, petrol purchased on the day may be used for other purposes at another time, such as driving to the supermarket and therefore, cannot all be attributed to the path itself. If you are unsure about how to interpret economic data, it may be worth consulting someone with economic analysis expertise.

➤ *Understanding how to analyse your data – qualitative data*

Qualitative analysis is less straightforward than quantitative given that it focuses on feelings and thoughts rather than measurable numbers of responses. It may be better to contract this type of surveying to experts. However, there are some steps, which were undertaken during the business depths for the John Muir Way research programme, which may assist in the analysis of this kind:

- The analysis should provide insight into the problem being investigated rather than simply summarising what people said, which means that the survey objectives were kept in mind throughout this process.
- Non-verbal communications (including tone of voice during telephone calls) were noted and taken into account when interpreting findings.
- Due to the interviews being undertaken by telephone for the John Muir Way research, notes were taken during the discussion and typed up afterwards. Where possible, it is beneficial to record the discussion (with the respondent’s permission).
- The recorded discussions were typed up as soon as possible afterwards, allowing the identification of key findings. This saved time later and avoided confusion when undertaking a number of discussions.
- As soon as possible after the completion of all the interviews, those undertaking them had a brainstorm of the key findings coming out of the qualitative research. This is especially useful where more than one person has undertaken the interviews. Keeping the objectives in mind was important here.

➤ *Be clear about how count analysis has been undertaken and keep it as straightforward as possible*

Any visit numbers produced using counts, or even automatic counters, are estimates and must be both reported and treated as such. For the John Muir Way survey, the average number of users per interviewing shift was calculated and then applied to the number of daylight hours across the year, depending on whether the shift was undertaken during the week or at the weekend. These estimates were then totalled to get an annual estimate. Where automatic counter data existed, this was used for those locations.

➤ *Producing an analysis data set*

As well as analysing data at the overall, all respondent level, it can be useful to cross tabulate the results of a question with those of another question. For example, cross tabulation may be undertaken to allow the analysis of data by gender (i.e. responses from

males in comparison to responses from females) or activity undertaken (e.g. responses from walkers compared to responses from cyclists). This type of analysis can provide a better understanding of results.

Microsoft Excel can be used for further, bespoke analysis, using functions such as PIVOT TABLES, AVERAGE and COUNT IF. A lot of further guidance on the use of Microsoft Excel for the analysis of survey data is available online.

For the John Muir Way user survey, data tabulations were produced with a number of analysis variables (or crossbreaks) included, for example, analysis by gender, age, social grade etc. and with the results shown as percentages. An SPSS file was also produced to allow further analysis at a later date should this be required. SPSS files can also be exported into Excel to allow the analysis mentioned above to be undertaken.

- *Consider the users of the findings when creating reports of the results – multiple formats and differing levels of detail may be required*

Increasingly, icons and graphical presentations of data and survey results are being used. These can help to bring the data to life and to make the results both easier to digest and more appealing than very word heavy outputs. More graphical and less wordy outputs are particularly useful for those who only require the headline results and/or are operating under time constraints. There are online sites where you can subscribe or pay for such icons if they are not available within your organisation.

In addition to this Word report of the John Muir Way results, a PowerPoint summary of the results will be presented in person. An alternative to this is to undertake a webinar, where participants can view the slides being presented by logging on to an online site and can hear the presentation by dialling into a conference call number. These can be a cost-effective way of reaching a large group of people, a variety of stakeholders and of reaching a geographically dispersed audience.

## ANNEX 1: QUESTIONNAIRE

T1

Text

**CAPI script records location, date and time of interview.**

**Full postcode to be captured - only used only for analysis purposes**

### INTERVIEWER READ OUT

Good Morning/Afternoon/Evening. I am conducting a survey on behalf of **TNS**. The survey is to find out how often people use this path and about the reasons for their visits, and I would like to ask you a few questions.

The interview length depends on the answers you provide, but will last on average 10 to 12 minutes.

The information you provide will be treated in the strictest confidence. It will only be used for analysis purposes.

Here is a leaflet that explains your rights under our industry code and the data protection act.

**First of all, can I check if you have been interviewed already at *this site/ area of the path before?***

**IF YES – BEEN INTERVIEWED ALREADY CLOSE. IF NO – NOT BEEN INTERVIEWED CONTINUE with screener questions**

Q1

Single coded

Which of the following statements best describes your situation?

- 1  I have just arrived on this path
  - 2  I am just about to leave this path
  - 3  I am in the middle of my visit to this path
  - 4  I am crossing over the path and will not be walking/cycling/horse riding on the path
- ↪ **SCREEN OUT**

Q2

Single coded

Are you.....READ OUT

- 1  On a short trip (of less than 3 hours) from home
- 2  On a day out (for more than 3 hours) from home
- 3  Staying away from home (e.g. on holiday or visiting friends/relatives)
- 4  Commuting to or from work/study
- 5  Other (specify)

*\*Open \*Position*

**Q3**

**Single coded**

In total, how far did you travel to reach the start of your visit on this path today?

Interviewer - make sure that the distance recorded is one way - to the place the visit to the path started from

- 1  Less than 2 miles
- 2  2-5 miles
- 3  6-10 miles
- 4  11-20 miles
- 5  21-30 miles
- 6  31-40 miles
- 7  41-50 miles
- 8  51-60 miles
- 9  61-80 miles
- 10  81-100 miles
- 11  More than 100 miles

**Q4**

**Single coded**

What was the main mode of transport you used to travel here today?

This is the mode used to reach the path rather than while on the path. If more than one mode of transport used, ask for the one used for the longest amount of time.

- 1  Car/van
- 2  Walked
- 3  Bicycle/Mountain Bike
- 4  Private minibus/coach
- 5  Public bus
- 6  Train
- 7  Motorcycle
- 8  Horseback
- 9  Other (specify)

**Q5**

**Single coded**

And what is the main mode of transport you have/ will use on the path today?

This question relates to transport used whilst on the path. If more than one mode of transport used, ask for the one used for the longest amount of time.

- 1  Walking
- 2  Bicycle/Mountain Bike
- 3  Horseback
- 4  Wheelchair/ mobility scooter
- 5  Other (specify)

**Q6**

**Single coded**

Is this your first visit to this path? IF NO: How often have you used this path in the last 12 months?

- 1  First visit ever
- 2  More than once per day
- 3  Every day
- 4  Several times a week
- 5  Once a week
- 6  Once or twice a month
- 7  Once every 2-3 months
- 8  Once or twice
- 9  Not sure\don't know
- 10  Not been in last 12 months

**Q7**

**Single coded**

Are you here today with...

- 1  On your own\alone **single code**  
↪ **GO TO Q10**
- 2  With other members of your family
- 3  With friends
- 4  With an organised group
- 5  Other (specify)

**Q8**

**Open**

How many adults, including yourself, aged 16 and over are on this visit?

Write in number.

**Q9**

**Open**

How many children aged under 16 are on this visit?

Write in number.

**Q10****Single coded**

Do you have a dog with you today?

- 1  Yes
- 2  No

**Q11****Single coded**

In total, how long was/will your visit be today, in terms of time – that is the total time spent, including travelling time to and from the path?

- 1  Less than 1 hour
- 2  1 up to 2 hours
- 3  2 up to 3 hours
- 4  3 up to 4 hours
- 5  4 up to 5 hours
- 6  5 up to 8 hours
- 7  8 hours or more

**Q12****Single coded**

And how far are you intending to travel along the path itself today?

If respondent is unsure of the exact amount, ask for an estimate.

- 1  Less than 1 mile
- 2  1-2 miles
- 3  3-5 miles
- 4  6-10 miles
- 5  10 miles or more
- 6  Don't know

**Q13****Multi coded**

Are you aware that you are on a path which has a particular name? [Spontaneous]

- 1  Yes
  - 2  No
- ↩ [GO TO T2](#)

**Q14****Single coded**

Can you tell me the name of this path?

Do not show screen

- 1  John Muir Way  
↩ [GO TO Q15](#)
- 2  Any mention of John Muir  
↩ [GO TO Q15](#)
- 3  Other (specify)  
↩ [GO TO T2](#)
- 4  Don't know/not sure  
↩ [GO TO T2](#)

**T2**

**Text**



(If codes 1 or 2 at previous question - As you know, ...) This path is actually part of the John Muir Way, a long distance route which stretches for 134 miles across central Scotland; from Helensburgh on the west coast through to Dunbar on the east coast.

The route travels through both countryside and towns, using paths, tracks, canal towpaths and minor roads.

The John Muir Way was officially opened in April 2014 and is named after the conservationist John Muir who was born at Dunbar and became a founder of America's national park system.

**Q15**

**Single coded**

How important was the fact that this path is part of the John Muir Way in your decision to visit here today?

- 1  My sole reason for coming
- 2  My main reason for coming
- 3  One of several reasons for coming
- 4  Of no importance
- 5  Don't know

**T3**

**Text**

Interviewer Instructions: If someone is in the process of walking the whole JMW in a single long walk code 1 Yes at Q17 and 1 at Q18

**Q16**

**Single coded**

Have you previously or are you planning to walk the whole of the John Muir Way? By this I mean either in a single long walk over consecutive days or across several separate visits taken to complete different sections.

Hand map to respondent. Clarify if this trip is part of completing the whole route (all at once or in sections). If it is, code as planning to walk.

- 1  Yes, have previously walked  
↩ **GO TO Q17**
- 4  Yes, planning to walk  
↩ **GO TO Q17**
- 2  No  
↩ **GO TO Q19**
- 3  Don't know  
↩ **GO TO Q19**

*\*Position*

**Q17**

**Multi coded**

**How did you complete/ how do you plan to complete the whole of the John Muir Way?**

Show map

- 1  On a single long walk over consecutive days  
↕ [GO TO Q18](#)
- 2  Across several separate visits taken to complete different sections  
↕ [GO TO Q19](#)
- 3  Not sure at present but I would like to complete it in the future  
↕ [GO TO Q19](#)

**Q18**

**Multi coded**

**When did you or do you plan to walk the whole of the John Muir Way on a single long walk?**

- 1  Currently walking all of the route
- 2  Walked it all in the last 12 months
- 3  Walked it all longer ago
- 4  Plan to walk it all in the next 12 months
- 5  Plan to walk it all more than 12 months from now

**Q19**

**Multi coded**

How did you first find out about this path?

Show screen

- 1  General knowledge/always known about it
- 2  From friends/relatives
- 3  Saw Leaflet (specify)
- 4  Guide Book (specify)
- 5  Newspaper/magazine
- 6  Signpost
- 7  Noticed it in passing
- 8  Map
- 9  Tourist Information Centre
- 10  Information in my accommodation
- 11  Radio/television
- 12  Internet
- 13  On an organised trip/tour
- 14  John Muir Way website
- 15  Scotland Great Trails website
- 16  Scottish Natural Heritage website
- 17  Other website (specify)
- 18  Other (specify)



**Q20****Multi coded**

What are your main reasons for visiting this path today?

Do not show screen

- 1  To spend time with family/friends
- 2  To entertain a child
- 3  For health/ exercise
- 4  Part of my trip to complete the John Muir Way end to end
- 5  To complete a section of the John Muir Way
- 6  To take part in a specific challenge/ charity event/ named walk
- 7  To generally challenge myself/achieve something
- 8  To exercise a dog
- 9  For fresh air or to enjoy pleasant weather
- 10  To be somewhere I like
- 11  For peace and quiet
- 12  To relax and unwind
- 13  To learn something about the outdoors
- 14  To enjoy scenery or wildlife
- 15  To help out/volunteer
- 16  To take part in a sport or hobby
- 17  Recommended to me by friends/ family
- 18  Seen/ heard/ read something about John Muir Way
- 19  Specific challenge/ charity event
- 20  Visiting with a club/ organisation/ organised group
- 21  Part of my commute to work/ school/ college
- 22  Pleasant alternative route to get to my destination (non-work related trip)
- 23  Information at my accommodation
- 24  Other (specify)

**Q21****Multi coded**

Will you use any of the following while on the John Muir Way today?

Show screen

- 1  A map of the John Muir Way printed off the website
- 2  A map of the John Muir Way included in the guidebook
- 3  A map of the John Muir Way from another source
- 4  An ordnance survey map
- 5  Another map (specify)
- 6  A GPS device
- 7  A compass
- 8  Smartphone/ tablet app
- 9  Another aid to help you on the route
- 10  None of these
- 11  Signposting provided along the route

**Q22**

**Single coded**

How would you rate the clarity of the signposting on the John Muir Way?

Single coded

- 1  Excellent
- 2  Very good
- 3  Good
- 4  Fair
- 5  Poor

**Q23**

**Single coded**

Overall, how satisfied are you with your experience of using the John Muir Way?

- 1  Extremely satisfied
- 2  Very satisfied
- 3  Quite satisfied
- 4  Not very satisfied
- 5  Not at all satisfied

**Q24**

**Multi coded**

What do you particularly like, if anything, about this path?

Probe: Anything else?

- 1  Quality of paths
- 2  Availability of cycle routes
- 3  Access to tourist attractions/historical sites from the path
- 7  Access to towns and villages from the path
- 10  Access to pubs/restaurants/ cafes from the path
- 12  Convenience/ease of access by car
- 19  Convenience/ease of access by public transport
- 16  Clear signposting
- 17  Variety of types of paths and experiences the path offers
- 18  Variety of views, scenery, landscapes and terrains the path goes through
- 20  Plenty of places to sit/ picnic
- 14  other, namely...

*\*Open \*Position*

**Q25****Multi coded**

And what do you think needs to be improved, if anything?

Probe: Anything else?

- 1  Quality of paths
- 2  Availability of cycle routes
- 3  Access to tourist attractions/historical sites from the path
- 7  Access to towns and villages from the path
- 10  Access to pubs/restaurants/ cafes from the path
- 12  Convenience/ease of access by car
- 19  Convenience/ease of access by public transport
- 16  Clear signposting
- 17  Variety of types of paths and experiences the path offers
- 18  Variety of views, scenery, landscapes and terrains the path goes through
- 20  Plenty of places to sit/ picnic
- 14  other, namely... *\*Open \*Position*

**Q26****Multi coded**

On today's visit, did/ will you personally spend any money on any of the items listed. Please include any money you have/ will spend on other members of your immediate party.

Interviewer: If visiting with a large group/organised group, ensure answers given are for respondent's immediate party only. Probe any others?

- 1  Food and drink
- 2  Petrol\diesel\LPG
- 3  Car parking
- 4  Bus\train fares
- 11  Overnight accommodation for tonight
- 5  Entrance to local visitor attractions
- 6  Baggage transfer service
- 7  Maps\guidebooks\leaflets
- 8  Gifts\souvenirs
- 9  Other items (specify)
- 10  Didn't spend any money

**Q27****Open**

How much did you spend on Food and drink? Please include anything you may have spent on behalf of others in your party?

Insert actual figure - estimate to nearest pound if uncertain

**Q28**

**Open**

How much did you spend on Petrol\diesel\LPG? Please include anything you may have spent on behalf of others in your party?

Insert actual figure - estimate to nearest pound if uncertain

**Q29**

**Open**

How much did you spend on Car parking? Please include anything you may have spent on behalf of others in your party?

Insert actual figure - estimate to nearest pound if uncertain

**Q30**

**Open**

How much did you spend on Bus\train fares? Please include anything you may have spent on behalf of others in your party?

Insert actual figure - estimate to nearest pound if uncertain

**Q31**

**Open**

How much did you spend on Overnight accommodation? Please include anything you may have spent on behalf of others in your party?

Insert actual figure - estimate to nearest pound if uncertain

**Q32**

**Open**

How much did you spend on entrance to local attractions? Please include anything you may have spent on behalf of others in your party?

Insert actual figure - estimate to nearest pound if uncertain

**Q33**

**Open**

How much did you spend on baggage transfer services? Please include anything you may have spent on behalf of others in your party?

Insert actual figure - estimate to nearest pound if uncertain

**Q34**

**Open**

How much did you spend on maps\guidebooks\leaflets? Please include anything you may have spent on behalf of others in your party?

Insert actual figure - estimate to nearest pound if uncertain

**Q35**

**Open**

How much did you spend on gifts\souvenirs? Please include anything you may have spent on behalf of others in your party?

Insert actual figure - estimate to nearest pound if uncertain

**Q36****Open**

How much did you spend on anything else? Please include anything you may have spent on behalf of others in your party?

Insert actual figure - estimate to nearest pound if uncertain

**Q37****Single coded**

The total amount is around £<Answer dependent on routing>. Is this correct?

- 1  Yes  
2  No

**Q38****Multi coded**

Apart from the John Muir Way, are you aware of any other long distance routes or paths in Scotland? If yes: which ones?

Do not show screen

29  No, not aware of any other long distance routes.

 [GO TO Q40](#)

- 1  Great Glen Canoe Trail  
2  Great Glen Way  
3  Southern Upland Way  
4  Three Lochs Way  
5  West Highland Way  
6  Borders Abbeys Way  
7  Catearan Trail  
8  Cross Borders Drove Road  
9  Rob Roy Way  
10  Romans and Reivers Route  
11  St Cuthbert's Way  
12  Ayrshire Coastal Path  
13  Berwickshire Coastal Path  
14  Fife Coastal Path  
16  Kintyre Way  
17  Moray Coast Trail  
18  Mull of Galloway Trail  
19  West Island Way  
20  Annandale Way  
21  Clyde Walkway  
22  River Ayr Way  
23  Speyside Way  
24  Dava Way  
25  Formartine and Buchan Way  
26  Forth and Clyde Canal  
27  Union Canal  
28  Other (specify)

**Q39****Multi coded**

What other long distance ways or paths, if any, have you used?

Do not show screen

- 29  None
- 1  Great Glen Canoe Trail
- 2  Great Glen Way
- 3  Southern Upland Way
- 4  Three Lochs Way
- 5  West Highland Way
- 6  Borders Abbeys Way
- 7  Cateran Trail
- 8  Cross Borders Drove Road
- 9  Rob Roy Way
- 10  Romans and Reivers Route
- 11  St Cuthbert's Way
- 12  Ayrshire Coastal Path
- 13  Berwickshire Coastal Path
- 14  Fife Coastal Path
- 16  Kintyre Way
- 17  Moray Coast Trail
- 18  Mull of Galloway Trail
- 19  West Island Way
- 20  Annandale Way
- 21  Clyde Walkway
- 22  River Ayr Way
- 23  Speyside Way
- 24  Dava Way
- 25  Formartine and Buchan Way
- 26  Forth and Clyde Canal
- 27  Union Canal
- 28  Other (specify)

**Q40****Single coded**

Have you heard of Scotland's Great Trails?

- 1  Yes
- 2  No
- 3  Not sure

**Q41****Single coded**

How often on average have you taken visits to the outdoors for leisure and recreation in Scotland in the last 12 months?

These leisure trips could either have been from home or while you were away from home on holiday, provided the holiday was in Scotland. By outdoors, we mean open spaces in the countryside as well as in towns and cities such as woodland, parks, farmland, paths, beaches etc.

- 1  More than once per day
- 2  Every day
- 3  Several times a week
- 4  Once a week
- 5  Once or twice a month
- 6  Once every 2-3 months
- 7  Once or twice

**Q42**

**Single coded**

Are you...?

- 1  Male
- 2  Female

**Q43**

**Single coded**

Age:

- 1  16-24
- 2  25-34
- 3  35-44
- 4  45-54
- 5  55-64
- 6  65+

**Q44**

**Single coded**

Are you....?

- 1  Employed full time (30+ hrs/ wk)
- 2  Employed part-time (9-29 hrs/ wk)
- 3  Self-employed
- 4  Unemployed - seeking work (up to 12 months)
- 5  Unemployed - seeking work (over 12 months)
- 6  Not eligible for employment
- 7  Looking after home/ family
- 8  Studying
- 9  Retired
- 10  Prefer not to say

**Q45**

**Single coded**

In which of the following countries do you live?

- 1  Scotland
- 2  England (including Channel Islands and Isle of Man)
- 3  Wales
- 4  Northern Ireland
- 5  Republic of Ireland
- 6  Germany
- 7  France
- 8  Italy
- 9  Spain
- 10  Netherlands
- 11  Other European (please specify)
- 12  USA
- 13  Canada
- 14  Australia
- 15  New Zealand
- 16  Other (please specify)



**Q46****Single coded**

Is your ability to participate in outdoor recreational activities limited because of a long-term illness, health problem or disability which has lasted, or is expected to last, at least 12 months?

- 1  Yes, limited a lot
- 2  Yes, limited a little
- 3  No, not limited at all

**Q47****Single coded**

Please select the occupation that best describes what the Chief Income Earner in your household does, or the group that fits best.

- 1  Higher managerial, administrative or professional (e.g. Bishops, Established doctors, Lawyers, Solicitor, Self employed farmers with 10+ employees, Board Director in large organisation (200+ employees), Bank Branch Manager or higher, Police Superintendent
- 2  Intermediate managerial, administrative or professional (e.g. Vicar, Parson, Newly qualified (under 3 years) Doctors, Solicitor, Self employed farmers 2-9 employees, Board Director small organisation, Senior Managers, Bank Clerks with special responsibility
- 3  (e.g. Curate, Monk, Nun, Student Doctor and student on grants, Articled Clerk, Self employed farmers with only 1 employee, Foreman with 25+ employees, Bank Clerk, Salesperson, etc.) Supervisory or clerical, junior managerial, administrative or professional
- 4  Skilled manual workers (e.g. Foreman with up to 24 employees, Police Constable, Agricultural Workers with special skills (Head Cowman, Chief Shepherd), Self employed unskilled manual workers with 1-4 employees, Bus Driver, Ambulance Driver, AA Patrolman
- 5  Semi and unskilled manual workers (e.g. Non-HGV drivers, All apprentices/trainees to skilled workers, Caretaker, Park keeper, Postman, Fisherman, Forestry Worker, Bus Conductor, Traffic Warden, Shop Assistant, Shelf-Filler, Checkout Operator, etc.)
- 6  Student (other than student on grants)
- 7  Casual workers (not in permanent employment)
- 8  Housewife/husband
- 9  Retired
- 10  Unemployed or not working due to long-term sickness
- 11  Not working due to disability
- 12  Full time carer of other household member
- 13  Other (specify)

*\*Position fixed*

**ANNEX 2: MANUAL COUNT SHEET**

JOHN MUIR WAY VISITOR SURVEY 2014-2015 (JN:260127243)

**COUNT SHEET**

Location (write in details of where worked)

Interviewer name

Date of counts

<b>Day</b>		<b>Month</b>

Shift start time

				(24 hour clock)
--	--	--	--	-----------------

Shift end time

				(24 hour clock)
--	--	--	--	-----------------

Any breaks in counting (e.g. toilet breaks)

Break start time

				(24 hour clock)
--	--	--	--	-----------------

Break end time

				(24 hour clock)
--	--	--	--	-----------------

**WRITE IN TOTALS COUNT BELOW AT END OF YOUR SHIFT. WHERE ZERO, WRITE IN 00:**

<b>TOTAL COUNTS DURING SHIFT</b>			
On foot	On bike	On horseback	Wheelchair/ mobility scooter

**PLEASE RECORD THE WEATHER DURING YOUR SHIFT IN THE BOX BELOW**

Party:	On foot	On bike	On horseback	Wheelchair/mobility	Party:	On foot	On bike	On horseback	Wheelchair/mobility
1					28				
2					29				
3					30				
4					31				
5					32				
6					33				
7					34				
8					35				
9					36				
10					37				
11					38				
12					39				
13					40				
14					41				
15					42				
16					43				
17					44				
18					45				
19					46				
20					47				
21					48				
22					49				
23					50				
24					51				
25					52				
26					53				
27					54				

## ANNEX 3: DISCUSSION GUIDE FOR BUSINESS DEPTHS

### 260127243 – JOHN MUIR WAY VISITOR SURVEY 2014-15 DRAFT DISCUSSION GUIDE

#### IMPACT OF JOHN MUIR WAY ON LOCAL BUSINESSES/ ATTRACTIONS

##### Intro

- Thank you for agreeing to take part.
- Your name, company, independent
- Purpose of conducting the depth interviews
- Opinions, no right or wrong
- Will not be recorded but will be taking notes
- About 30-45 minutes
- Confidential unless given permission otherwise
- Briefly introduce this research
  - Mention on behalf of SNH – can give Aileen as a contact if one at SNH is requested

*Bear in mind that some of the contacts will regard themselves as visitor attractions rather than businesses. See sample database for classification and amend wording throughout accordingly.*

##### Background

- Could you please give me a bit of background on your business/ attraction? *If asked why, for analysis purposes and to ensure we interview a range of businesses/ attractions.*
  - Type of business/ attraction
  - number of years established
  - number of employees
  - operate from a single base/multiple bases
- What would you say is your target market or markets i.e. local, day visitors, holidaymakers?
  - Are there any markets you'd like to see more of but are not as yet? If so, who and why do you feel you are not reaching them yet?
- What type of marketing you typically use? How do people find out about your business? What type of media do you use (website, print etc.)
- Are there any recent initiatives which you have taken/taken advantage of which you feel have helped your business/ attraction?

##### Awareness of the John Muir Way and the opportunities it offers

*If asked: The John Muir Way stretches 134 miles or 215 km across Scotland's heartland, running between Helensburgh in the west through to Dunbar on the east coast and Muir's birthplace. It provides opportunities for local people and visitors to enjoy short walks, day trips and longer coast to coast expeditions.*

- Are you aware that your business/ attraction is on/ near to the John Muir Way?

- *If yes, what do you know about the JMW? Have you ever used it yourself for a personal leisure visit?*

*Give short description of JMW if needed.*

- Based on your own personal knowledge [and the information I have just read out], what type of impacts do you expect the JMW to have in the long-term?
  - In general (*prompt if needed, on visitor numbers, how busy the area is etc.*)
  - Specifically, what do you think the economic impact will be :
    - on Central Scotland; the local area
    - on your business in particular
- What types of business opportunities will the JMW offer :
  - to your business/ attraction – *if none/ struggling to think*, what could be done to maximise the opportunities the JMW can offer your business?
  - to other businesses/ attractions?
- What types of businesses and attractions will benefit most?
- How quickly do you expect any benefits to filter through?

#### **The impact of the JMW on your business**

- What particular initiatives, if any, have you personally taken to maximise the potential of this opportunity? What particular initiatives, if any, are you planning for the future?

##### **FOR INTERVIEWER INFO:**

*At the moment all of the businesses/attractions on the contact list have some sort of presence on the JMW website which they get for free. For interviewers' information, responsibility for managing the website may pass from SNH at some point in the future and its possible that businesses/ attractions may then have to pay for advertising.*

- Have you been involved in any other initiatives associated with the path

##### **FOR INTERVIEWER INFO:**

*These are most likely to be initiatives taken by the LAs (esp Falkirk Council) along the route though we don't have the details. There were also a number of events organised around the time the route was launched, for example, the John Muir Festival (<http://www.johnmuirfestival.com/#whats-on>)*

- What direct or indirect benefits has your business/ attraction experienced?
  - *Prompt if needed* e.g. more customers/ visitors for your existing business/ attraction, a broader customer/ visitor base, a longer season, the opportunity to develop a completely new market?
  - What proportion of your customers/ visitors would you say are JMW users?
- Are you aware of other local businesses and/or visitor attractions which have benefitted?
  - *If yes, in what ways?*
- Prior to April 2014, did you refer to John Muir in your marketing activities?
- Post April 2014, what role does John Muir/ the JMW play in your current marketing activities?

- Will it feature in your marketing activities in the future? If so, how?

### **Taking advantage of the opportunity**

- How easy has it been to develop your business/ attraction in relation to the path?
  - Have you received the help/support/information you need?
  - What constraints, if any, have you experienced/what needs to be improved?
- What could be done in future to increase awareness of the opportunities presented by the path and help local businesses and attractions take advantage of them?

### **Closing**

- Is there anything else that you would like to say about the JMW or anything else you think needs to be considered in maximising its benefits to businesses and attractions?

There may be interest in using some of the information from this survey for case studies in materials aimed at helping businesses and attractions to maximise the economic possibilities of the JMW. Are you happy for us to use any of the information you have provided in this way?

Please be assured that your business/ attraction will not be identified without your permission. We are happy to provide you with the information we think may be of interest for you to approve before anyone else sees it. Would that be ok?

- Thank you very much for your time.

#### **ANNEX 4: SOCIAL GRADE DEFINITIONS (BASED ON CHIEF INCOME EARNER)**

- 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. Widows/widowers of people previously grade A.
- 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. Widows/widowers of people previously grade B.
- 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. Widows/widowers of people previously grade C1.
- 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/widowers, if receiving pensions from their late husband's/wife'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/widowers, if receiving a pension from their late husband's/wife'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 income earner are coded in this group

## ANNEX 5: APPROACHES USED TO ESTIMATE VOLUMES OF PATH USAGE

The following describes the approaches used to produce the estimates of volumes of path usage provided in this report, describing how data were collected, methods used to analyse and gross up the results and any related 'health warnings'.

### Data collection approaches

Data on volumes of usage were collected in two ways:

- 1) **Manual counts of path users** – during each of the 42 interviewing shifts undertaken between November 2014 and October 2015, fieldworkers also counted numbers of users. This data was collected, using the form included in Annex 2, for hourly periods (e.g. 10am to 11am, 11am to 12 am, etc.) with fieldworkers recording whether visitors were on foot, bicycle or using another mode of transport (e.g. horse).

While the number of days of counting undertaken at each of the 10 interview locations varied, with more counting undertaken at the busiest locations, at most locations a mix of weekdays and weekends and different times of year were included.

- 2) **Automatic counter data** – at two of the interview locations (Dalmeny and Strathblane), automatic counters were in place, providing accurate data on volumes of usage at these points. These data included the exact time of visits and direction of movement with uninterrupted measurement available for the entire fieldwork period (24 hours x 365 days).

### Converting manual count data to estimates of annual usage at each location

Two alternative approaches were used to obtain estimates of total annual usage at each of the 10 interview locations as described in the note below:

- 1) *Weekday/ weekend grossing approach:*
  - a. The count data is used to produce estimates of the average volume of visitors passing the interview point per hour. *Separate average rates are calculated for weekdays and weekends.* These averages are usually based on more than 1 day of fieldwork (e.g. both summer and winter weekdays and weekends at the location are included).
  - b. These estimates of average visits are grossed up to an annual estimate using information on total daylight hours over the year (this excludes daylight hours before 6am as usage is likely to be very low).
  - c. This provides estimates of total annual weekday and weekend usage for each site which can then be combined to obtain an estimate of overall annual usage of the location.
- 2) *Seasonal grossing approach:*
  - a. The count data is used to produce estimates of the average volumes of visitors passing the interview point per hour. Separate average rates are calculated for four quarterly periods:
    - November to February
    - March to May
    - June to August
    - September to November
  - b. These estimates of average visits are grossed up to an annual estimate using information on total daylight hours in each of the quarterly periods (again excluding daylight hours before 6am).



- c. The above provides estimates of total annual weekday and weekend usage for each site which are then combined to obtain an estimate of overall annual usage of the location.

### Using automatic counter data

At the locations with automatic counters in place (Dalmeny and Strathblane), data were extracted for the 12 month survey period (November 2014 to October 2015).

The automatic counters produce separate counts for pedestrians and cyclists and distinguish visitors moving in different directions along the route. For the purposes of this exercise both pedestrians and cyclists were included (this is consistent with the manual counting undertaken and visitor interviewing). Also counts for one direction only were used to reduce the potential for double counting of individuals within a single visit to the path who would pass a counter twice (i.e. on outward and return journey).

### Combining data to obtain estimates of total path usage

The above approaches provided estimates of total annual visits taken to each of the 10 interviewing locations. As two alternative approaches have been used to gross up the manual count data and estimates for some locations were available from both manual count data and automatic counters, a range of values was produced as shown in the table below.

#### *Estimated annual visits by location*

Interview location	Lower estimate	Upper estimate
Dunbar/ East Linton	16,300	22,000
North Berwick	28,800	30,900
Brunstane Burn	49,400	49,800
Dalmeny	20,700	36,200
Blackness	24,800	27,100
Bo'ness	19,600	24,200
Bonnybridge	31,400	49,700
Craigmarloch	20,100	22,400
Strathblane/Kilsyth	15,500	22,200
Helensburgh	15,200	19,900
<b>Total</b>	<b>243,900</b>	<b>302,300</b>

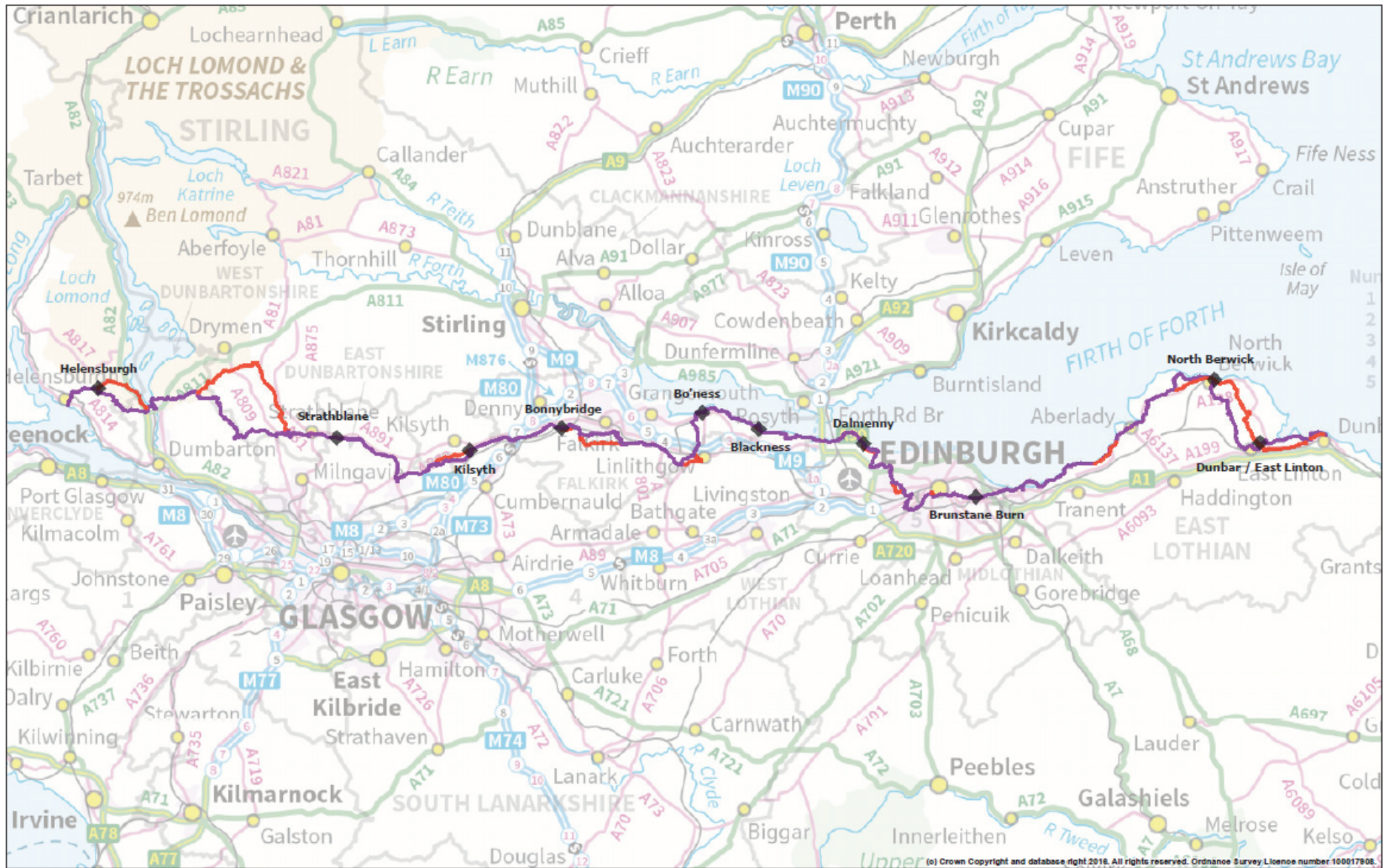
To obtain an estimate of total path usage these estimates for each location were combined, providing a final estimate that between 240,000 to 300,000 visits were taken to the JMW in this period.

**Notes:**

The following should be noted when using these estimates:

- the estimates are of individual visits to the John Muir Way rather than visitors (e.g. 10 visits may be made by 1 visitor over a period of time).
- as with any survey results, these figures are estimates with associated margins of error. The manual count data were obtained during just over 250 hours of manual counting undertaken across 10 locations, with the counting periods and locations carefully selected to obtain a range of different types of path usage. In grossing up the data it has been assumed that the spread of count days and locations were generally representative of overall path usage.
- the estimates reflect 'true' John Muir Way users who were purposefully walking or cycling on the route, rather than incidental users who happened to join the route for a short period while undertaking another activity (e.g. routine shopping while in an urban location such as South Queensferry to Helensburgh). The locations selected for counting and interviews helped to ensure that only 'true' users were included in the sample.

ANNEX 6: MAP OF SURVEY LOCATIONS



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