
Maximising the tourism benefits to the Scottish Borders of the Borders Railway

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1 Introduction

1.1 Background

The Borders Railway was officially opened by Her Majesty the Queen on the 9th September 2015 and was the biggest domestic railway project in Scotland for over 100 years. The £294 million project has resulted in the reinstatement of regular services running between the central Borders and Edinburgh Waverley and the construction of seven new stations.

Since the opening of the railway line, the success of the railway has been illustrated through impressive initial passenger numbers. It has been reported that 500,000 passengers used the railway in less than five months after opening (BBC News, 2016a); this suggests that the 650,000 total passengers per annum stated in its business case (Ernst Young, 2012) will be significantly exceeded in its first fully operational year.

The original closure of the railway and the subsequent campaign for re-opening of the line has been a particularly emotive one (Spaven, 2012). On this basis, it could be fair to assume initial passenger numbers have been enhanced by the eagerness of local people and railway enthusiasts alike to experience the reopened route once again.

Although this may be the case, the future health of the railway still appears very positive. Already, politicians from across the spectrum have committed to a study to investigate a further extension of the line (BBC News, 2016b). In this context, a thorough understanding of the underlying business case successes will be paramount to an accurate appraisal of any extended route.

1.2 Tourism and the Borders Railway business case

The majority of the appraisal work undertaken in preparation of the business case for the Borders Railway was based on commuting, housing and employment. The benefits to tourism were highlighted as a potential side benefit of the Borders Railway, although evidence suggests that the finer detail of such benefits was overlooked in earlier preparatory work (The Market Specialists, 2004).

This lack of a deeper understanding is quite critical, for at present the benefits of the line have been primarily concerned with the outward movement of people from the Borders to employment centres in Edinburgh and the central belt. To truly maximise the potential of the line, and indeed any proposed extension, the benefits accrued in both directions must be known.

Whilst there is some emerging evidence of new business investment in the Borders as a result of the railway (Scottish Borders Council, 2016), the potential for tourism is enormous. Approximately 50% of international tourist trips to Scotland include an overnight stay in Edinburgh and a third of international tourism spend in Scotland is spent in Edinburgh (Scottish Parliament, 2005).

With a journey time of just under an hour, the Borders Railway now brings the region within an easy and potentially very attractive day trip for visitors to the capital. To maximise the economic benefits to the Borders region, there is a clear need to understand what role the Borders Railway and transport in general can play.

1.3 Research objectives

The aim of this research was to examine the tourism impact of the railway in the initial months of opening and identify ways in which those benefits could be maximised in the long term.

The objectives of the research were to:

- define the link between transport and tourism in a Scottish context;
- examine previous studies which have predicted the potential impact of the Borders Railway;
- measure the initial impact of the Borders Railway on tourism; and
- determine the transport-specific measures needed to maximise future tourism patronage of the railway.

The objectives were achieved through a literature review and a comprehensive series of surveys of users of the new line, visitors to attractions in the Borders and tourists in Edinburgh.

2 Literature review

2.1 Potential impact

Prior to the opening of the Borders Railway, multiple studies were undertaken by various organisations to analyse the potential impact on the Scottish Borders. The main potential benefits that have been reported include the increased access to Edinburgh's buoyant labour market for Scottish Borders and Midlothian residents, significant housing development opportunities to spread commuter pressure southwards and the stimulation of the region's population which would reverse the aging trend of residents in the Borders (The Scottish Parliament, 2005).

In addition, it was predicted that the Borders Railway would improve accessibility to and from the region, allowing the Scottish Borders to become a 'connected place' and thereby providing an incentive for inward business investment and increased local spend in the region (Scottish Borders Council, 2014). These opportunities are predicted to lead to the increased vibrancy and sustainability of the local community and it is expected that the accessibility and social inclusion benefits will be felt along the entirety of the Borders Railway line (Johnston & Causley, 2012).

2.2 Transport and Tourism

At present very little is understood about the internal accessibility of Scotland as a destination from a visitor's perspective, including how visitors travel within the country, the transport demands and needs of visitors and to what extent visitors are reliant on public transport (Ferguson & Thompson, 2007).

Page et al (2010) promote the importance of travel within a destination with a focus on increasing access to spread the positive impacts of tourism. They note that transport can be seen as a central driver in the growth of tourism industries and have drawn attention to the link between countries with thriving tourist economies and investment in transport. They maintain that in these countries development in tourism has often been transport led and they stress that transport planning should not be considered as a marginal activity when promoting the development of tourism.

Approximately 35% domestic and 85% of international visitors to Scotland arrive without a car and are therefore potential users of public transport. The creation of new rail infrastructure to increase the network of public transport is vital (Ferguson & Thompson, 2007) and as Page et al (2010) maintain Scottish transport infrastructure is a 'key priority to achieve further growth in tourism'.

2.3 Tourism and the Borders Railway

From examining the initial literature published before the opening of the Borders Railway, it is apparent that the impact on tourism is documented by some studies as a secondary benefit (The Market

Specialists, 2004). Additionally, the Waverley Bill Committee noted that none of the objectives of the Borders Railway set out in the original promoter's memorandum were tourism specific.

Notwithstanding this, the Borders Railway is included in the 'Tourism Scotland 2020 Strategy' which aims to promote Scotland's tourism industry and achieve growth of around £1 billion by the year 2020 (Scottish Tourism Alliance, 2012). It is anticipated that the Borders Railway will be able to deliver 1.9 million return journeys annually and it is hoped that a large number of these trips will be taken by visitors to the region (Scottish Borders Council, 2014).

2.4 Tourism in Scotland

Tourism is an important sector within the Scottish economy and it is reported that tourism in Scotland generates approximately £12 billion and accounts for around 5% Gross Domestic Product (GDP) (Scottish Government, 2016). Approximately 15.5 million over-night tourism trips were taken in Scotland in 2014, with visitors spending around £4.8 billion (Visit Scotland, 2014). More than 80% of Scotland's over-night visitors are from within the UK (Page, Yeoman, Connell, & Greenwood, 2010), with overseas tourism accounting for around 17% of the total (Visit Scotland, 2014).

Overnight visitors to Scotland from within the UK partake in a variety of activities, at 58% general sightseeing is the most popular with relaxing and short walks accounting for 30% and 21% respectively. Visiting castles, stately homes and galleries accounted for 18% of the total (Visit Scotland, 2014). Tourists also travel to Scotland for the day and in 2014 approximately 127 million people visited Scotland on a day trip with a total expenditure of around £5 billion (Visit Scotland, 2014).

2.5 Edinburgh Tourist Market

It is anticipated that the bulk of visitors who use the Borders Railway will most likely be based in Edinburgh (Crossman, 2015).

Approximately 50% of international tourist trips to Scotland include an overnight stay in Edinburgh and 1/3 of international tourism spend in Scotland is spent in Edinburgh (The Scottish Parliament, 2005). Edinburgh attracts around 3.7 million staying visitors annually, with an average length of stay of 2.3 nights for domestic and 4.3 nights for international visitors, generating a total average annual spend of £983 million (Visit Scotland, 2013).

2.6 Tourism in the Scottish Borders

The Scottish Borders offers attractive scenery and a rich history, boasting rolling hills and numerous country houses, castles and monuments. The total visitor spend in the Scottish Borders generated £71 million for the region's economy from around 363,000 tourist trips annually. The tourist industry employs around 3,200 people within the Scottish Borders, around 8% of the region's workforce (Visit Scotland, 2015).

However, in comparison to other areas in Scotland, tourism as a proportion of total employment is relatively low in the Scottish Borders (The Market Specialists, 2004). In addition, the Scottish Borders has over 7% of Scotland's visitor attractions but only receives 3% of visitors to Scotland (The Scottish Parliament, 2005). This indicates that the promise of the tourism industry of the Scottish Borders is perhaps not being fully utilised. Transport, in particular the Borders Railway could play a significant role in unlocking this potential.

3 Methodology

3.1 Data requirements

To complete the research objectives introduced earlier, several questions were raised with regard to the current and potential future tourist market for the Scottish Borders, including:

- What are the like-for-like visitor numbers to major tourist attractions in the Scottish Borders during autumn 2015 when compared with the previous autumn prior to the railway opening?
- What is the travel mode of visitors at tourist attractions in the Scottish Borders?
- How aware are and what is the potential usage of the Borders Railway amongst domestic and international tourists in Edinburgh?
- What attractions do users of the Borders Railway visit in the Scottish Borders?
- What was the average spend of visitors at attractions?
- What influenced passengers and visitors to use the Borders Railway?
- What is the potential future usage of the Borders Railway and what future recommendations could be employed to maximise tourist usage?

It was decided that a quantitative approach would be taken to gather this information. Data was gathered using a mixture of primary and secondary data through four different approaches, as follows.

3.2 Attraction Visitor Survey

There are several attractions a short distance from the railway. Some, such as the National Mining Museum at Newtongrange are directly served and are already easily accessible from the railway. Other attractions have great potential to be visited via the railway, but the means or awareness of access may currently be limited. It is these attractions which are of particular interest.

Two such attractions are Abbotsford House and Melrose Abbey. Both are less than two miles from the railway terminus at Tweedbank, but access options are limited. Improvements to onward transport connections could result in additional potential visitor numbers using the railway as their primary form of access.

To determine the current travel habits of visitors to these attractions, interview-based questionnaire surveys were undertaken during October 2015. The questionnaires gathered data on various issues including:

- Origin of visit
- Mode of transport
- Spend during visit
- Reason for taking train (if applicable)
- Views on potential improvements which would encourage rail use

3.3 On-Train Passenger Survey

Passenger demand has been high since the opening of the Borders Railway, a proportion of which is tourist traffic. As described previously, it is acknowledged that part of this traffic is likely to be short term, with many users simply interested to experience the new line. However, underlying this is a true tourist element and it is important to understand the motivations for their use for the train.

To this end, on-train interview surveys were conducted on both southbound and northbound trains between Tweedbank and Edinburgh Waverley over the course of a Saturday in October 2015. Questions were asked during this survey relating to the respondent's visit, including:

- Motivations for using the Borders Railway
- Attraction(s) they intended to visit
- How easy they perceived the onward access to attractions to be
- Spend during visit
- Views on potential improvements which would encourage rail use

3.4 Edinburgh City Centre Tourist Survey

Whilst the previously described surveys captured the views of those already visiting the Borders and/or using the railway, they did not cover the latent demand from the Edinburgh tourist market. To ascertain the potential of this market, surveys were also carried out with visitors in the City Centre.

Interview surveys were carried out at the Visit Scotland tourist office in Edinburgh over the course of a day in December 2015. These surveys included questions covering:

- Origin (i.e. domestic or international tourist)
- Awareness and usage of the Borders Railway
- Awareness of attractions in the Borders
- Views on potential improvements which would encourage rail use and/or visits to the Borders.

3.5 Visitor Numbers Statistics

Inevitably, interview surveys only capture a sample of the visitor population. To ascertain what the potential initial effect of the Borders Railway was to tourism, a review of visitor numbers was also carried out, comparing post-opening autumn 2015 figures with pre-opening autumn 2014. The attractions analysed were Abbotsford House, Jedburgh Abbey, Dryburgh Abbey, Melrose Abbey, Floors Castle.

4 Results

4.1 Survey Response Rate

There were 74 respondents from the attraction surveys, 162 respondents from the on-train surveys and 56 respondents from the tourist office survey, giving a total of 292 people surveyed. The data gathered from these responses are summarised on a thematic basis in the following sections.

4.2 Awareness and Potential Use of the Railway

Edinburgh tourists were asked if they were aware of the Borders Railway. The results showed that 20% of tourists were aware of the Borders Railway while 80% were not. In general, this indicates that from those surveyed there is a lack of awareness of the Borders Railway and therefore the usage may not be fully maximised as yet among visitors to Edinburgh.

Participants were also asked if they had used the Borders Railway before and the results showed that none of those surveyed had previously used the railway. The participants were then given a brief overview of the Borders Railway regarding the project details, route, times, prices and the major attractions available in the Scottish Borders. Following this briefing, 95% of tourists stated they would be interested in using the Borders Railway while only 5% would not. The survey results indicate that there are a potential number of visitors who may use the Borders Railway in the future, providing that they are aware of the railway.

4.3 Awareness of Attractions

As previously mentioned, the Scottish Borders has a relatively large number of Scotland's tourist attractions. In order to establish the awareness of major attractions within the Scottish Borders, tourists travelling on southbound trains between Edinburgh Waverley and Tweedbank were asked whether they were aware of some major attractions. The results are shown in Figure 1.

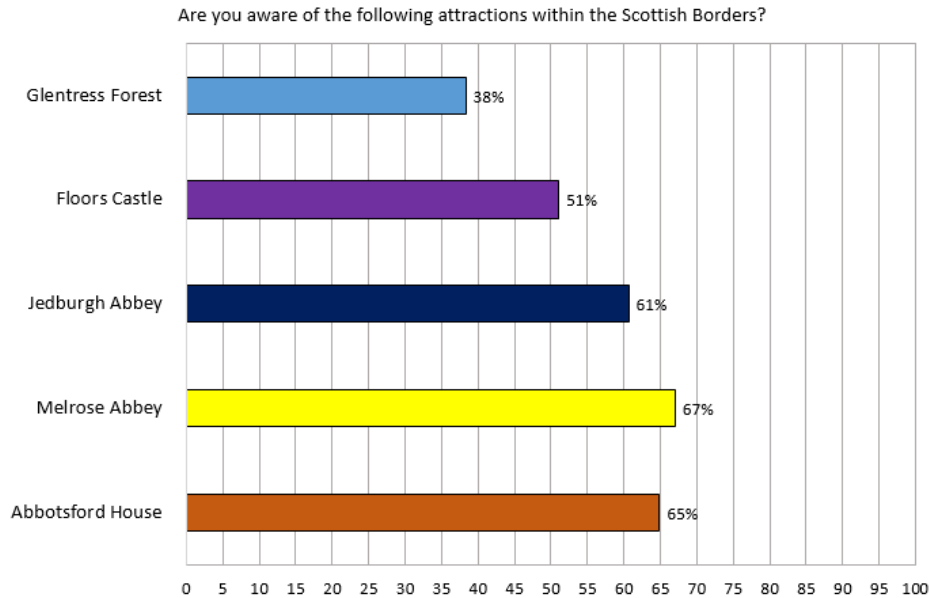


Figure 1

The results show that over two thirds of people were aware of Melrose Abbey and Abbotsford House respectively. Additionally, a large proportion of visitors travelling to the Scottish Borders were also aware of Jedburgh Abbey. Just over one half of visitors were aware of Floors Castle and just over one third were aware of Glentress Forest. There may be numerous reasons for this, including age and interest of participants, reasons for visiting the Scottish Borders, marketing of attractions and seasonal variations.

It is interesting that the awareness of attractions generally corresponds to the distance of the attractions from the end-point of the Borders Railway line. In other words, more people were aware of the attractions that were closer to Tweedbank. The figures were also reflected in the results of visitor perceptions on how easy it is to access attractions from the closest Borders Railway station as shown in Figure 2.

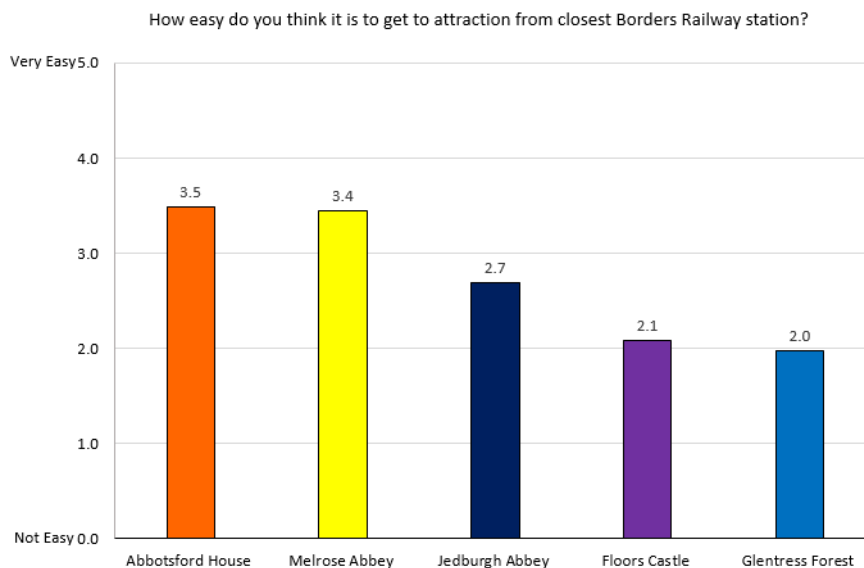


Figure 2

These results show that the visitors using the Borders Railway are more aware of attractions that are closer to the railway line and are correspondingly considered easier to access by the participants. Indeed, Melrose Abbey and Abbotsford House are within 1-2 miles of Tweedbank train station and are

accessible via public bus, by foot, by a short taxi ride and by a hop on hop off bus called the 'Borders Weaver'.

Surveys were also conducted on northbound trains to target tourists returning from attractions in the Scottish Borders and in total 68 people were surveyed. The surveys were conducted on Saturday trains departing Tweedbank at 10:01, 14:01 and 16:31. 32 people of those surveyed did not visit any major attractions in the Scottish Borders so Figure 3 shows the only attractions that were visited by participants on the day the surveys were conducted.

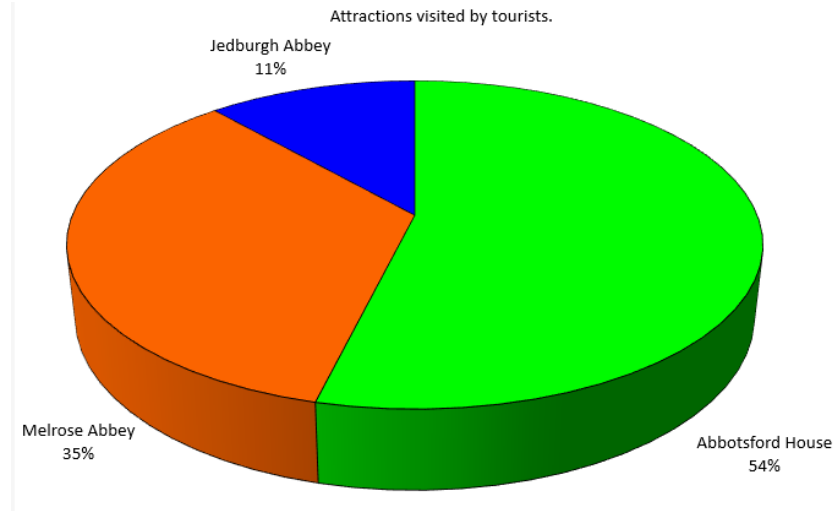


Figure 3

Abbotsford House received the most visitors, with 54% of people visiting the attraction. Melrose and Jedburgh Abbey received 35% and 11% of visitors respectively. As previously mentioned, Abbotsford House and Melrose Abbey are within 1-2 miles of Tweedbank station. In contrast, Jedburgh Abbey is approximately 16 miles from Tweedbank station. Again this indicates that the Borders Railway may be having a positive impact on some tourist attractions as visitors seem to be visiting the attractions within closer proximity of the railway line.

Figure 4 shows how accessible it was to get to the attractions by those surveyed on north-bound trains.

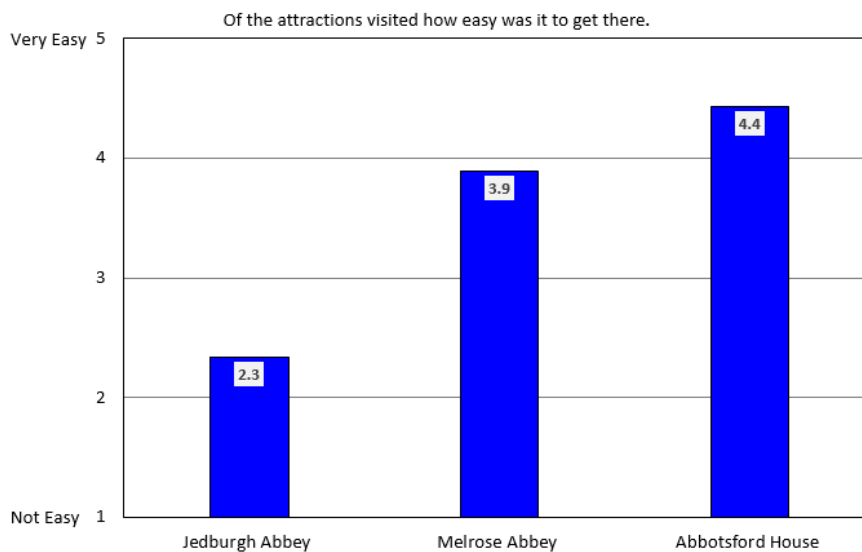


Figure 4

Abbotsford House was considered to be easy to access by the 54% of people who visited the attraction on the day, with a score of 4.4. This corresponds to the results from the question on perceived ease of access to attractions from the surveys conducted on southbound trains, as Abbotsford House was considered the easiest to access. Interestingly, both Abbotsford House and Melrose Abbey ranked higher in actual easiness to access from those surveyed on northbound trains than in the perceived easiness to access from those surveyed on southbound trains. In contrast, Jedburgh Abbey was ranked lower in actual easiness to access with a score of 2.3 compared to a score of 2.7 in perceived easiness to access. This shows that links to attractions which are in close proximity to the railway line may be better than what is perceived by those travelling south to visit the region.

4.4 Visitors at Attractions since the Railway

Figure 5 shows the percentage change in visitor numbers at major tourist attractions in the Scottish Borders between September–November 2014 and September–November 2015, which coincides with the official opening of the Borders Railway on September 9th 2015.

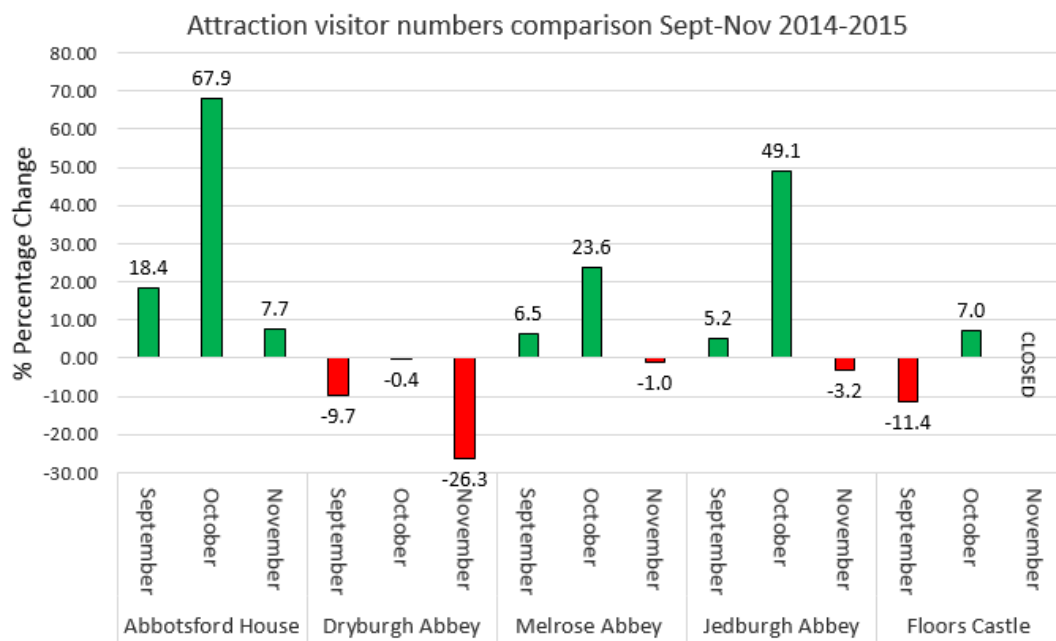


Figure 5

The results indicate that the majority of attractions have seen an increase in visitor numbers during these like-for-like periods. Most notably, Abbotsford House has seen a significant increase with visitor numbers up by 18.4% in September and 67.9% in October. Melrose Abbey and Jedburgh Abbey have also seen increases in their visitor numbers during these periods, most notably during the month of October. Dryburgh Abbey on the other hand has not shared a similar trend, with visitor numbers declining during the same periods. Floors Castle has also experienced decreasing visitor numbers in September, while October saw an increase of 7%.

It is clear that some major attractions in the Scottish Borders have experienced increased visitor numbers in the like-for-like period between September–November 2014/2015. In order to determine whether the Borders Railway has contributed to this increase, surveys were carried out at Abbotsford House and Melrose Abbey with a focus on the travel mode of visitors. The attraction surveys were conducted over the course of one day with a total of 56 people surveyed at Abbotsford House and 18 people surveyed at Melrose Abbey. The results from the surveys are shown in Figures 6 and 7.

What would you consider your main mode of transport to Abbotsford House?

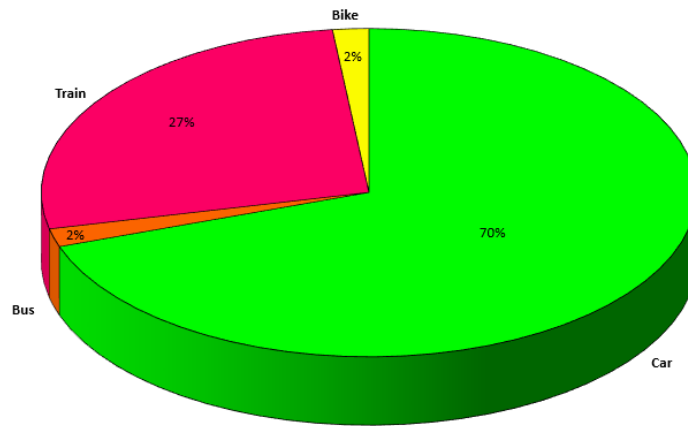


Figure 6

What would you consider your main mode of transport to Melrose Abbey?

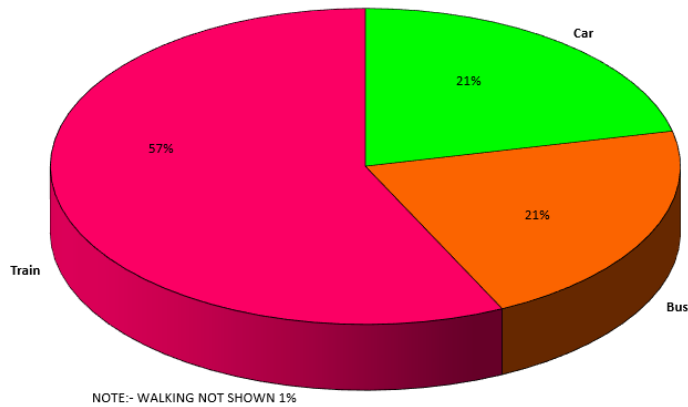


Figure 7

The results indicate that a number of tourists have used the Borders Railway as a means of transport to the attractions, with 27% of those surveyed at Abbotsford House and 57% of those surveyed at Melrose Abbey considering the train as their main mode of transport. Figure 8 shows the origin of visitors surveyed at Abbotsford House and Melrose Abbey.

Where have you travelled from to visit Abbotsford House?

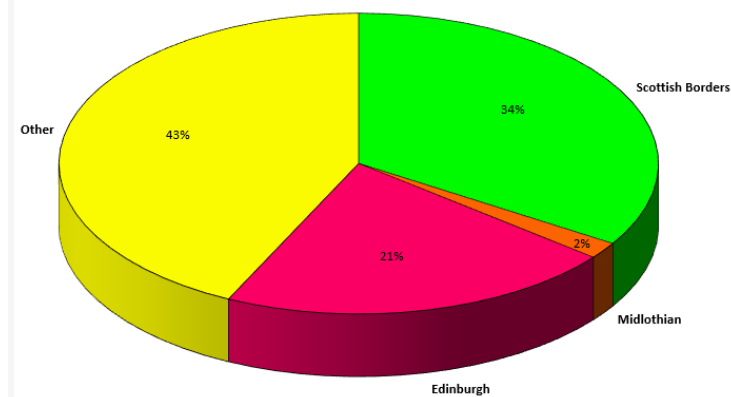


Figure 8

The figure highlights that visitors to Abbotsford House and Melrose Abbey come from a wide variety of origins and that the majority of visitors to these attractions are travelling from areas outwith the Scottish Borders.

4.5 Visitors Spend Profile

Figure 9 shows the average spend of those surveyed at Melrose Abbey and Abbotsford House who had used the railway to access the attractions as well as those surveyed on northbound trains from Tweedbank to Edinburgh who indicated that they had visited an attraction. Participants were asked to specify how much they were likely to spend or had spent whilst they were in the Scottish Borders.

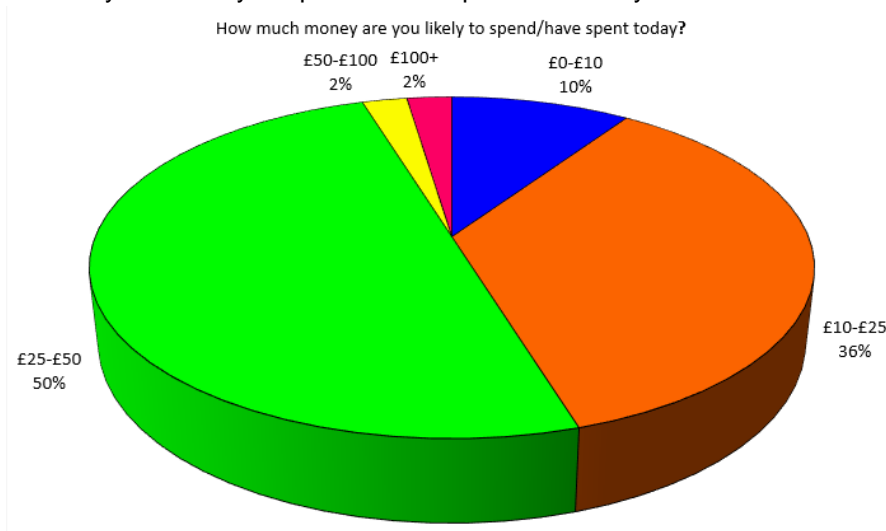


Figure 9

In terms of forecasting the potential economic benefits brought by future visitors to the Scottish Borders by rail, Figure 9 provides a useful indication.

4.6 Influencing Factors

Participants of the south-bound and north-bound on train surveys were asked to rate the importance of six influencing factors on the mode choice for their journey. The results of the question are shown in Figure 10.

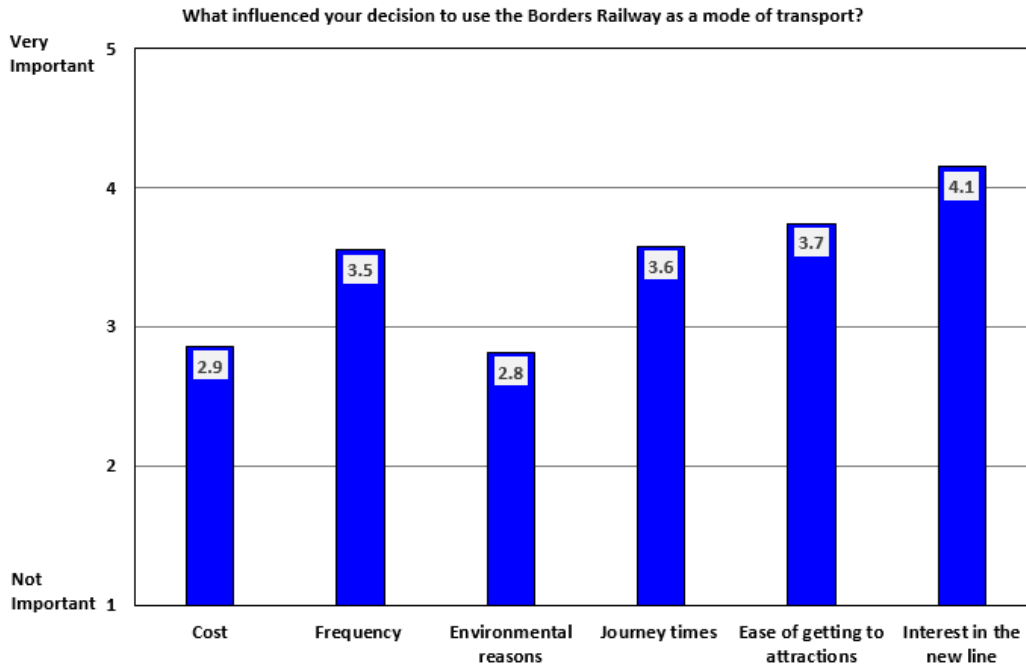


Figure 10

The figure shows that participants considered 'interest in the new line' an important factor when deciding to use the Borders Railway as a mode of transport. The result is not surprising given that the surveys were conducted approximately 1-2 months after the opening of the railway and therefore this may have been the first journey on the Borders Railway for some of the participants. Some of those surveyed indicated that they would consider themselves railway enthusiasts and had travelled from further afield in order to specifically travel on the railway.

Participants surveyed were also asked to consider factors which could influence their decision to use the Borders Railway in the future and participants travelling on north-bound trains and those visiting Abbotsford House and Melrose Abbey who had accessed the attraction by using the train were asked what could influence their decision to visit any of the major attractions in the Scottish Borders in the future. The results are shown in Figures 11 and 12.

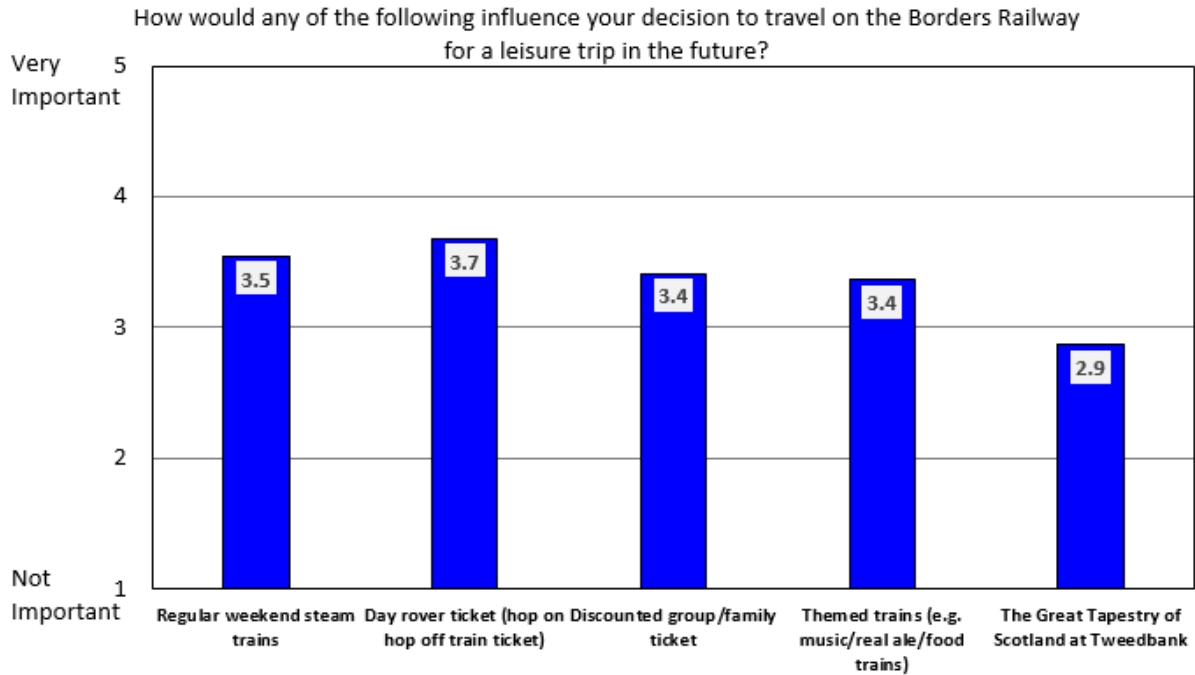


Figure 11

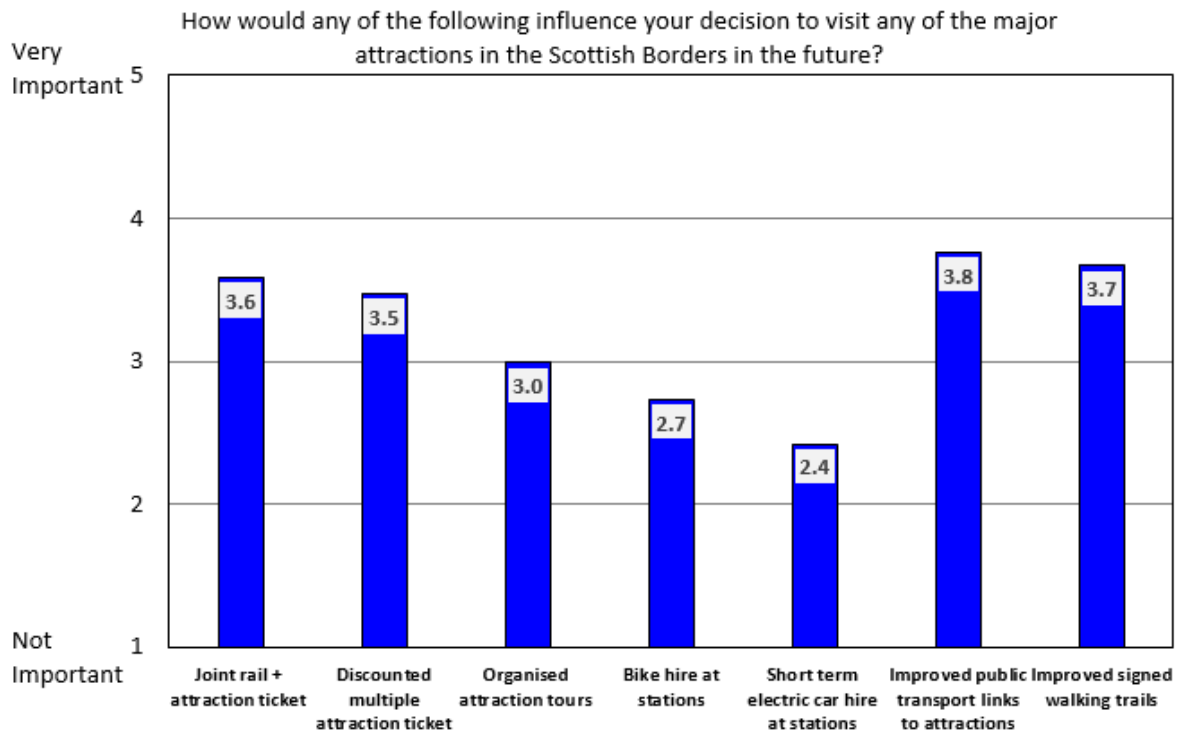


Figure 12

The survey results show that a number of influencing factors associated with saving money were considered of high importance to the participants. The day rover ticket (hop on/ hop off ticket), discounted group/ family ticket, joint rail and attraction ticket and discounted multiple attraction ticket all scored highly. To encourage future use of the Borders Railway and subsequent visits to attractions, cost saving incentives/schemes could be introduced in partnership between attractions and the rail provider.

Improved public transport links to attractions and improved signed walking trails were also rated of high importance by those travelling on north-bound trains, having visited an attraction in the Scottish Borders as well as those surveyed at Abbotsford House and Melrose Abbey who had used the railway to access the attraction.

The Great Tapestry of Scotland at Tweedbank, organised attraction tours, bike hire at stations and short term electric car hire at stations were considered less important as influencing factors in the decision to travel on the Borders Railway for leisure trips and to visit attractions in the future.

4.7 Future of the Borders Railway

A total of 185 participants travelling on both southbound and northbound trains as well as those visiting Melrose Abbey and Abbotsford House who indicated that they had used the train to access the attraction. They were asked how likely they were to use the Borders Railway for subsequent leisure trips in the future. The results are shown in Figure 13.

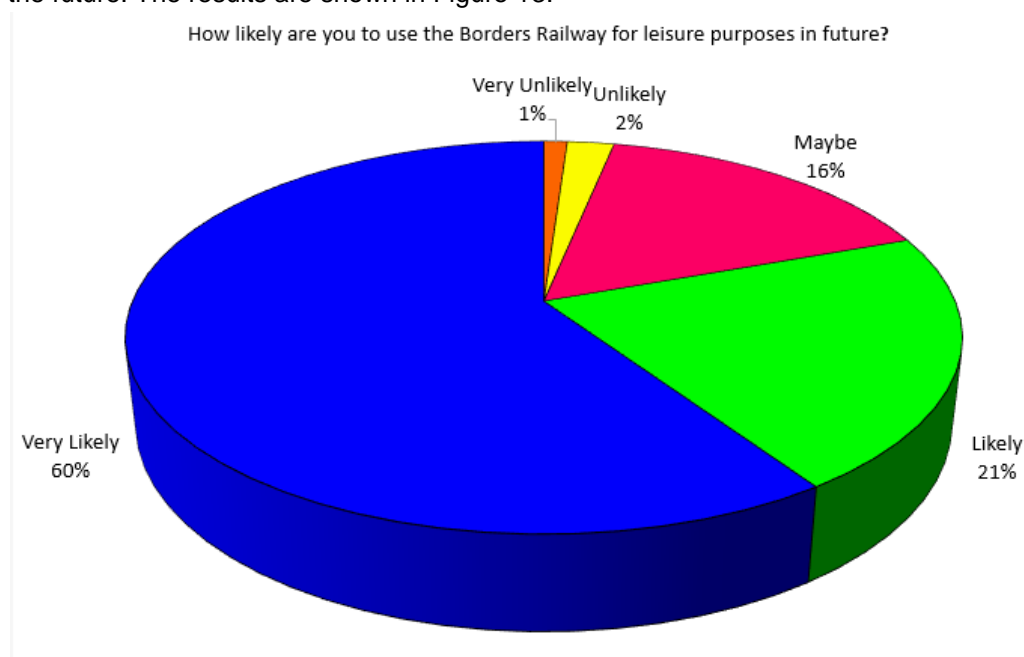


Figure 13

These results show that the Borders Railway is considered a viable mode of transport for the majority of those surveyed.

4.8 Suggestions for Improvement

All participants were asked an open question regarding suggestions or improvements that could be made to the Borders Railway which could positively impact tourism in the Scottish Borders. A range of answers were given and the ones considered to be of most value have been extracted here.

A number of those surveyed highlighted that they would like to see the railway line extended beyond Tweedbank to Carlisle. Indeed, one participant maintained *'It's great to be using the railway. I'm really impressed with the set up but it should be continued to Hawick or Carlisle'* while another stated *'I would have liked to have seen more of the Borders so it would have been good if the railway went further than Tweedbank'*.

A number of those surveyed also mentioned the railway stations along the route and suggested that they could be more inviting and provide some more information on the local area. One participant stated *'I arrived at Tweedbank and there were no toilets and not much information about where to go or what*

to do' while another maintained 'It would be nice to see the train stations made more of, like the one in Pitlochry'.

The other suggestions from participants for improving the Borders Railway included faster journey times, more bike spaces, more carriages, a beverage trolley, attraction leaflets on trains and the provision of maps of the Scottish Borders.

5 Conclusions and recommendations

5.1 Conclusions

The aim of this research was to examine the initial impact of the Borders Railway on tourism in the Scottish Borders and the potential role it could play in future. It showed the importance of tourism to the national economy and highlighted the Edinburgh and Scottish Borders tourism markets. It also showed that there is untapped potential in the Scottish Borders and it highlighted the important link between transport development and the growth of tourism.

The results from the work undertaken revealed a number of key points:

- There is a lack of awareness of the Borders Railway among tourists visiting Edinburgh;
- Amongst these visitors, 95% would be interested in using the railway as part of their visit to the capital;
- Awareness of attractions and access amongst tourists options decreases as distance of the attraction from the railway increases;
- There has been a significant like-for-like increase in visitor numbers at the attractions closest to the route;
- The majority of visitors are from outwith the region, each visitor bringing a spend of between £25 and £50 per person per trip; and
- Interest in the line has been a factor in the initial visitor numbers, but there is an underlying trend of longer-term tourism patronage potential.

5.2 Recommendations

Overall, this work has shown that the Borders Railway appears to be having a positive impact on tourism in the Scottish Borders, notably at attractions closer to the railway line. To maximise this impact and address the issues raised in the surveys, the following recommendations are made:

Issue	Recommendation
Lack of awareness in railway	Tourism marketing campaign
Awareness of attractions served	Joint attraction/rail ticket ticketing Line rover tickets Signing at stations Promotion by Community Rail Partnership
Perceived attraction access difficulties	Improved onward public transport links from stations Development and promotion of signed walking routes
General improvements to the railway	Development/adoption of stations Consideration of extension of the route

5.3 Further Work

Although the research presented here gives a useful initial understanding of the impact of the Borders Railway on tourism in the Scottish Borders during the first months of opening, further research must be undertaken in order to provide a comprehensive assessment on the impact over the long term. Given that the surveys are only representative of particular weekends during the months of October and

December, it would be useful to ascertain for example how the results differ during the peak summer season. Additionally research should be carried out beyond tourist attractions such as at shops, hotels and restaurants which would also indicate whether the Borders Railway is having a positive impact on tourism in a more general sense.

Notwithstanding this, from the work presented here the initial impact of the Borders Railway on tourism in the Scottish Borders appears very positive. Currently, the Borders Railway is exceeding expectations regarding passenger numbers and, providing that visitors continue to use the Borders Railway as a means of transportation, the Scottish Borders has a significant opportunity to develop its tourism potential and secure itself firmly on the map as a major tourist destination within Scotland.

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