

East Neuk 50 Tourism Development Study – Final Report Summary

The East Neuk 50 Cycle Route Community Interest Company (CIC) aims to establish a 50 mile sustainable tourism cycle route from Kirkcaldy railway station, round the East Neuk of Fife, up to Tayport before ending at the train station in Dundee. It is hoped that this route will encourage geographic spread around the region. Currently limited sections of the route are off road, but ultimately the intention is for the entire route to be separated from vehicles thereby have wider user appeal.

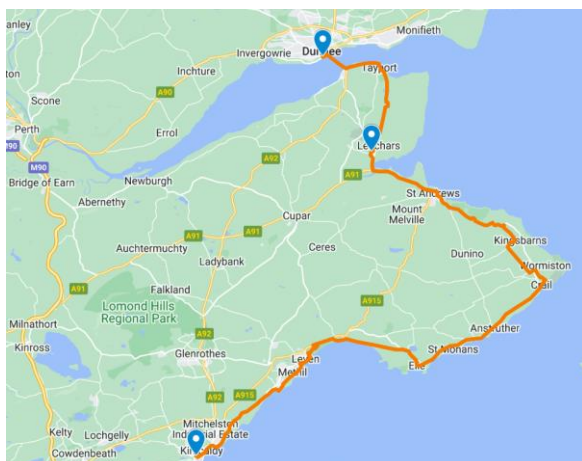
Bluebell Scotland and Glamis Consultancy along with research partners 56 Degree Insight were appointed by the CIC to carry out a tourism development study to help make the case for future development and investment.

The tourism study :

- Examined opportunities and issues
- Explored route themes
- Consulted with stakeholders and local businesses
- Undertook consumer research
- Delivered an economic business assessment
- Proposed a business plan and model



Opportunities	Issues
Cyclists do not need to start/finish at Kirkcaldy or Dundee – Leven or Leuchars provide flexibility	Limited bike capacity on trains, until rolling stock is replaced
Business opportunity to offer bike hire – and a benefit to cyclists if bike can also be collected at end of route	The bike route travels through some honeypot tourism areas in the East Neuk
Bike hire means fewer bikes on trains	With so much of the route being on roads there are concerns about safety, it is more suited to experienced cyclists
A new route contributes to responsible tourism	Numerous routes in the area with similar names – clear signage will be required
The route should be promoted as a leisurely cycle to encourage overnight stays	The route can be cycled in a day, but would deliver little in the way of economic benefit



There is no single theme that runs through the route, other than, and not surprisingly, the Fife Coastal Path. There are pockets of common ground in some areas – industrial heritage at the start of the route and maritime heritage, beaches, food and drink as you reach the East Neuk fishing villages. Royalty and religious pilgrimage appear periodically and art is dotted along the route. This lack of a single strong theme tends to suggest that when it comes to promoting the route it will be as a destination, rather than linked to a specific theme.

What do consumers think?

- The survey suggests high levels of interest in cycling the proposed route and this results in a large potential target market in Scotland and the North of England
- The overall target market are proportionally more likely to be male and they are also more likely to be under 45 years and are frequent cyclists
- Overall, two thirds of the potential target markets have visited Fife in the last couple of years. This is important as it suggests that there will be fairly high levels of awareness of Fife's appeal
- The appeal of the proposed route is clear with nobody interviewed describing it as unappealing, and over half describing it as 'very appealing'
- Amongst the target market, there is real interest in cycling the route – especially sections of it: just over half are extremely interested in doing so whilst over four in ten are extremely interested in cycling the whole route
- Most potential users estimated they would spend 2-3 days to cycle the route and this was most likely to be on a 1-3 night short break, typically with their partner or a friend
- The appeal and likely usage of the route increases significantly when it becomes predominantly off-road
- Just over 3 in five potential users of the route would use their own bike with the remaining 2 in 5 likely to hire. For those hiring, there is clear evidence of the importance that the bikes are collected at the end of the route
- Charging requirements are uppermost in the minds of those who would cycle the route on e-bikes – especially along the route, but also at accommodation stops



What do stakeholders and businesses think?

- The concept was welcomed as something 'new' that expands the tourism offer; something that can be marketed
- Concerns were raised by some about the safety of the route – suggestion of ditching the A roads and where relevant using alternative routes and core paths. This might mean that the route is longer than 50 miles so this might have an impact on the '50' in the route name
- Some consultees think that the name makes sense as it follows naming conventions for such routes. Others are concerned that there are too many things called 'East Neuk'
- It was acknowledged that the route will act as a catalyst for other cycle infrastructure to be installed, such as bike racks and freestanding bike repair stations
- It was observed that the EN50 should be routed into the villages more than it is in order for businesses to benefit
- It was pointed out by accommodation operators that this would not be of much benefit because they look for longer lets rather than just single nights

Economic Impact

Based on available data it is estimated that the EN50 could generate up to £7m in visitor expenditure based on levels of usage. Around 80% of the expenditure would accrue from staying visitors. Direct expenditure could support up to 100 FTE jobs and up to 167 FTE through direct and indirect expenditure impacts

Business Plan

- There are broadly two aspects of the business – development and operational stages
- In the development stages – if the CIC is to be the project developer then it will require further grant support to an estimated £100k over three years to project manage delivery of the route
- The estimated costs include studies and project management but excludes the capital costs of any required route infrastructure and start-up costs, which remain unknown at this time and are dependent upon the final route chosen, required infrastructure and sources of external funding
- When operational, it is assumed that the CIC will be responsible for a range of marketing and management activities on behalf of the EN50
- In that situation there are several potential trading revenues sources which could contribute to make the CIC financially self-sustainable – but the offer to businesses needs to be developed

In summary.....

- The development of this route provides an opportunity to provide visitors with a responsible tourism opportunity to explore the East Neuk and beyond.
- The consumer research undertaken was very favourable and suggests high levels of interest with over half describing it as ‘very appealing’. The appeal and likely usage, however, increases significantly when it becomes predominantly off-road. Safety concerns are likely to have an impact on target markets.
- The route should be designed in such a manner as to take it through villages and effort should be made to position it as a visitor experience taking several days to complete as well as being attractive for visitors to cycle in sections whilst staying in the area.
- The route will require significant development work and estimated costs have been provided for this, excluding capital works which will require specific expertise once the route is finalised and the infrastructure requirements confirmed.
- Based on available data it is estimated that the EN50 could generate up to £7m in visitor expenditure with direct expenditure supporting up to 100 FTE jobs and up to 167 FTE through direct and indirect expenditure impacts.
- With the route still needing to be finalised this report can only estimate how the CIC may proceed, and the associated costs to make it happen as it looks to deliver the route and develop a business model to develop marketing and revenue generating opportunities. Therefore, the next step is to look at the route and the associated business model in more detail and work in partnership with Fife Council, communities and landowners to finalise the route and then, if agreement is reached, how best to deliver it.

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