

MIDLOTHIAN & SCOTTISH BORDERS TOURISM DESTINATION AUDIT 2015



A Report for
Midlothian Council & Scottish Borders Council
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1. EXECUTIVE SUMMARY

1. This report outlines the findings of an audit of tourism products and services in Midlothian and Scottish Borders and was commissioned by Midlothian Council and Scottish Borders Council to identify tourism business development opportunities arising from the opening of the Borders Railway in September 2015.
2. The report identifies almost 30 themed tourism business development opportunities in Midlothian and Scottish Borders and outlines a variety of actions to progress each of them.
3. A number of the tourism business development opportunities can be progressed immediately and could be in place for the opening of the Borders Railway to ensure a quality visitor experience from day one of its operation. These include –
 - Collaboration and joint promotion between a small number of key magnet attractions located close to the railway that offer an exceptional introduction to the history, people, activities and countryside to which the railway provides fast access. (3 in Midlothian and 4 in Scottish Borders).
 - Collaboration and joint promotion between Midlothian activity facilities for youth markets in order to position the area as an exciting destination for younger visitors and family groups.
 - Development and promotion of multi-activity taster days and weekends to attract new entrants to outdoor activities in Scottish Borders.
 - Collaborative marketing of Midlothian small scale heritage accommodation and business tourism facilities.
 - Development of integrated travel and admission ticketing for events in Scottish Borders and promotion of short break packages around key events.
 - Collaborative retail promotions in both Midlothian and Scottish Borders. Midlothian promotions to spread visitors to the main retail complexes to other parts of the area. Scottish Borders promotions to spread visitors from town to town and retain them in the region through speciality shopping experiences.
 - Piloting of new visitor bus services linking Newtongrange and Gorebridge stations to nearby visitor facilities that are currently unconnected by scheduled bus services.

- Collaborative promotion of rural and countryside facilities in Scottish Borders and development of new events to encourage access to the region's countryside.
4. A greater number of opportunities will require longer term planning and implementation, but should help to develop new products and services that will maintain visitor interest in the railway and the destinations it serves. These include a number of initiatives to –
- Expand Midlothian's events offer, particularly through: promoting Dalkeith Country Park as a key venue; linking into the Edinburgh festivals; and developing an ongoing programmes of small scale cultural events in existing local venues.
 - Enhance the promotion of local food and drink by encouraging participation in accreditation schemes; joint promotion of fine dining establishments; and supporting new food and drink related events.
 - Link Midlothian footpaths, cycleways etc. to local attractions and facilities in order to create more reasons to enjoy them for "soft" outdoor activities close to urban areas.
 - Support additional joint marketing of built heritage facilities in Scottish Borders and coordinate extended opening periods to reduce seasonality of business.
 - Provide additional promotion and interpretation of high quality townscapes in Scottish Borders through audio tours, apps, guided walking tours etc.
 - Support cross-sector collaboration in Scottish Borders to create flexible new packages of experiences that will appeal to VisitScotland warm target segments and enable them to create their own individual tailored packages.
 - Develop and promote enhanced local heritage facilities in Dalkeith, Gorebridge and Newtongrange.
 - Pilot new hop on, hop off bus services linking iconic facilities in Scottish Borders and support collaboration on developing innovative new visitor transport services that enhance the visitor experience.
 - Work with the life science clusters in Midlothian to attract national and international business tourism events to the area.
 - Build on local sense of place to promote traditional and contemporary culture in Scottish Borders to appeal to different market segments including younger visitors.

5. Actions are needed to address current gaps in the provision of tourism products and services, which include –
 - Supporting the development of additional accommodation in Midlothian and Scottish Borders including larger scale hotels, large self-catering complexes and hostel/bunkhouse accommodation.
 - Researching the market potential for developing larger dedicated conference and meeting facilities in Midlothian.
 - Addressing the number of empty retail premises and lack of animation in larger town centres such as Galashiels, Hawick and Penicuik.
 - Supporting the development of at least one regular small scale venue in Midlothian for live music, drama etc. that can attract mature males and couples into the area for entertainment.
 - Providing orientation, catering and other facilities at the key gateway of Tweedbank Station.
 - Enhancing Midlothian's limited speciality shopping offer.
 - Enhancing Scottish Borders somewhat traditional and unimaginative night time economy to make it more appealing to young professional markets.
 - Creating a stronger sense of place in parts of Midlothian to position them as destinations in their own rights rather than dormitory suburbs of Edinburgh.
 - Developing indoor activity facilities for youth markets in Scottish Borders to complement the strong outdoor activities product.
6. The report incorporates analysis of long term national and local trends in the volume and real term value of tourism that illustrate the challenging environment in which the railway will open. Nonetheless, the tourism industry nationally and locally has proved more resilient than many other sectors during the recent, extended economic downturn.
7. The audit identified and recorded approximately 280 different tourism products and services in Midlothian and 1,300 different products and services in Scottish Borders.

8. Particular tourism strengths of Midlothian include –

- Innovative facilities for active younger markets.
- Heritage hotels and properties with small scale meeting facilities.
- Large retail complexes that attract visitors into the area.
- An extensive public transport infrastructure.
- A sizeable cycling business sector.

9. Tourism elements of Midlothian with potential for further development include –

- The range and scale of visitor accommodation in all sectors.
- Cultural and heritage offers.
- Facilities to accommodate business tourism events of scale.
- The limited range of speciality shopping and artist studios/galleries.
- Promotion of the local food and drink sector.
- The area's events portfolio.

10. Particular tourism strengths of Scottish Borders include –

- High quality accommodation stock, particularly in the serviced accommodation sector.
- Market leading facilities for outdoor activities.
- Iconic built heritage facilities providing high quality visitor experiences.
- A wide range of speciality shopping and artist studios/galleries.
- An extensive and imaginative portfolio events.

11. Tourism elements of Scottish Borders with potential for further development include –

- Limited hostel/bunkhouse and large scale self catering accommodation.
- Restricted seasonal operation of some built heritage facilities.
- A lack of innovative facilities for indoor activities to complement the top quality provision for outdoor activities.
- Integration of local food and drink into other elements of the visitor offer.
- A night time economy that would benefit from greater innovation and imagination.
- The visitor offer in the key gateway hubs of Galashiels and Tweedbank.

12. The report outlines the findings and main issues identified through over 30 stakeholder consultations and almost 90 responses to an online survey of local businesses. The main issues identified are –

- Local business desire for more information about the railway on which to base investment decisions.
- The reluctance of many local businesses to engage fully with the railway until they are persuaded of its business benefits.
- The importance of ensuring good quality, integrated onward travel from railway stations.
- Concerns about inadequate provision for carrying bikes on trains.

13. As part of this project, mystery shopper visits were made to 27 different towns and villages in Midlothian and Scottish Borders to assess the quality of their public realm; public transport infrastructure; customer service provision; and overall visitor experience. The main findings of these visits are –

- The high quality of townscapes and the vibrancy of the independent retail sector in a number of towns in Scottish Borders (Kelso, Melrose & Peebles in particular).
- The attractive local heritage in a number of towns and villages in Midlothian and its potential for development (Dalkeith, Gorebridge & Newtongrange in particular)
- The number of empty retail premises and the lack of animation in the centres of some larger towns such as Galashiels, Hawick and Penicuik.
- The strong sense of place in communities in the Scottish Borders and the much weaker sense of place in adjoining Midlothian communities closest to Edinburgh.
- The limited range of visitor facilities in the key railheads of Galashiels and Tweedbank.
- The considerable distance of some iconic visitor facilities from their nearest railway station and the importance of onward travel connections from them.

14. Collaboration and coordination will be essential to ensure business development opportunities arising from the Borders Railway are realised. Collaboration will be needed between different sectors of the tourism industry, different communities and the public and private sectors.

15. Over 60% of respondents to the online business survey state that they would like more information about the Borders Railway. Clearer and simpler messaging about the railway is needed to provide and engage businesses with such information.
16. Public sector agencies need to be aware of the limited capacity of volunteer led business representative groups to take the initiative in engaging local businesses with the Borders Railway. Representative groups may need support to build their capacity if they are to play a lead role in business engagement relating to the railway.
17. Over 80% of respondents to the online business survey expect the Borders Railway to benefit tourism in Midlothian and Scottish Borders. Only 40% expect the railway to benefit their own business. Business development opportunities may be missed unless more businesses are persuaded to align and engage with the railway. The hearts and minds of many local businesses are still to be won over to the railway.

2. INTRODUCTION & BACKGROUND

The new Borders Railway will commence scheduled services in September 2015. It will be the longest new domestic railway developed in the UK for more than 100 years and will provide rail links from Edinburgh Waverley to four new stations in Midlothian and three new stations in Scottish Borders.

Journey times from end to end will normally be under one hour and trains will run every half hour in both directions during the majority of the day. Monday – Saturday services will run from before 0600 to after 2300, with reduced services on Sundays. A one way, full price, adult ticket from end to end will cost under £10 with an off-peak adult return costing just over £13.

It is recognised that direct transport links are key to growing Scotland's tourism industry. The new Borders Railway will offer opportunities to transform the tourism economy in Midlothian and Scottish Borders and support its ambitions for growth. The former First Minister of Scotland stated an aspiration of generating 350,000 tourist trips p/a on the railway.

This report has been commissioned by Midlothian Council and Scottish Borders Council to supply a comprehensive destination audit of tourism products and services across all key product areas. The report is intended to identify –

- Key tourism assets.
- Priority geographical and sectoral areas linking to local and national tourism strategies.
- Gaps in the current provision of tourism products and services.
- Business development opportunities aligned to the new Borders Railway.

It is anticipated that this report will help to influence the development of a dedicated Borders Railway Tourism Business Development Programme that will be led by Business Gateway.

A number of elements of work have been undertaken to assist the preparation and compilation of this report. They are as follows –

- Review and analysis of existing marketing activity and market trends at national and local levels.
- Compilation of a detailed audit of existing and proposed tourism products and services in Midlothian and Scottish Borders.

- Consultations with key stakeholders to identify issues and opportunities and test initial ideas.
- Dissemination and analysis of an online survey to tourism operators in both areas to gauge industry awareness of, interest in and readiness to work with the Borders Railway.
- A programme of mystery shopper visits to locations and facilities throughout Midlothian and Scottish Borders to assess the quality of the public realm and the overall visitor experience.

This report pulls together the findings of these different elements of work to identify the current position of tourism in Midlothian and Scottish Borders and the opportunities for business and market development and growth aligned to the Borders Railway.

3. CURRENT MARKET POSITION & MARKET TRENDS – THE NATIONAL PICTURE

3.1. *Volume and Value*

It should be stated from the outset that the accuracy of many tourism statistics can be questionable with different reports contradicting each other and high margins of error on many individual stats. It is generally accepted that it can be unhelpful to compare figures year-on-year as there can be wide and often temporary variations due to unavoidable changes in sampling. Therefore, we have attempted to use figures that cover a number of years and, consequently, are more likely to smooth out any annual peaks and troughs.

At national level, we have used the “Tourism in Scotland” reports published annually by VisitScotland to analysis trends in overnight tourism visits. These are compiled using a number of internationally recognised surveys and monitors. In this report we have compared figures from 2006 and 2013 (the most recent figures currently available) in order build up as accurate a longer term picture as possible of the performance of overnight tourism in Scotland.

Table 3.1. Volume & Value of Scottish Tourism 2006 - 2013

	2006	2007	2008	2009	2010	2011	2012	2013
No of UK Tourist Trips	13.28m	13.12m	12.15m	12.47m	12.37m	13.36m	13.08m	12.35m
No of Overseas Tourist Trips	2.73m	2.79m	2.48m	2.56m	2.34m	2.35m	2.23m	2.44m
Total No of Tourist Trips	16.01m	15.91m	14.63m	15.03m	14.71m	15.71m	15.31m	14.79m
No of UK Tourist Bednights	47.16m	47.45m	44.19m	46.08m	44.56m	45.58m	44.47m	43.42m
No of Overseas Tourist Bednights	26.38m	24.54m	19.34m	21.91m	21.18m	17.72m	17.50m	19.36m
Total No of Tourist Bednights	73.53m	71.99m	63.53m	67.99m	65.74m	63.30m	61.97m	62.78m
Value of UK Tourist Spend	£2,720m	£2,836m	£2,812m	£2,736m	£2,628m	£3,018m	£2,979m	£2,944m
Value of Overseas Tourist Spends	£1,439m	£1,367m	£1,235m	£1,359m	£1,444m	£1,490m	£1,401m	£1,680m
Total Value of Tourist Spend	£4,159m	£4,203m	£4,047m	£4,095m	£4,072m	£4,508m	£4,380m	£4,624m

National figures show the ongoing importance of the domestic UK market to Scottish tourism. UK visitors accounted for 82.9% of all overnight trips taken in Scotland in 2006 and 83.5% of all overnight trips taken in 2013. In terms of overnight visitor spend, UK visitors accounted for 65.4% of such spend in 2006 and 63.7% of such spend in 2013. While the average overseas visitor spends more on each trip to Scotland, primarily due to their longer average length of stay, the domestic UK visitor continues to generate by far the majority of the volume and value of Scottish tourism.

Figures show significant variations year-on-year and highlight the impact of the changing economic climate from 2008 onwards. (2011, for example, stands out as a particularly good year.) Overall, the total number of overnight tourism trips taken annually in Scotland fell by 7.6% between 2006 and 2013. More detailed analysis of these figures shows that the number of Scots taking overnight trips in Scotland has remained relatively stable between 2006 and 2013, while visitor numbers from the rest of the UK and overseas have fallen.

Over the same period, the number of visitor bednights spent in Scotland fell by 14.6%. Average length of stay has fallen across all markets, with overseas visitors showing the largest fall from an average of 9.66 nights in 2006 to 7.73 nights in 2013. This reflects the growing popularity of shorter breaks and the drop in overseas visitors' length of stay probably also reflects the growing popularity of city breaks fuelled by improvements in direct air access into Scotland from Europe.

In terms of overnight visitor spend, it increased of 11.2 % between 2006 and 2013. However, according to the Bank of England, annual inflation averaged 3.3% between 2006 and 2013 and overnight visitor spend would need to have increased to £5,251 million by 2013 to keep the same real term value as in 2006.

Overall, national figures demonstrate the challenging and competitive overnight tourism economy in which the Borders Railway will operate. Nonetheless, it should be acknowledged that these figures reflect a sustained period of national economic downturn, during which tourism has performed better than many other industrial and commercial sectors.

It is anticipated that the success of Homecoming 2014 and the improvements in the overall economic climate may provide a springboard for future growth in Scottish tourism.

Day visitor figures are compiled separately from those for overnight tourism. At national level, they are derived from the Great Britain Day Visitor Survey, which has been undertaken annually in its present form since 2011 giving only three years of data.

Figures indicate that the number of day visits taken in Scotland was 134 million in 2011 and 124 million in 2013 (the most current figures available) – a drop of 7.4%. Total day visitor spend in Scotland was £6.152 million in 2011 and £4,647 million in 2013 – a drop of 24.5%.

We seriously question the accuracy of the 2011 spend figure, which seems unrealistically high and may reflect teething issues in setting up the operation of the new day visitor survey.

2013 day visitor spend figures show a spread of spend across each quarter of the year, peaking at 30% of total annual spend in July – September and dropping to 22% of total annual spend in January – March. These figures also indicate that the main elements of day visit spend in Scotland were as follows –

- Special shopping (21.5% of total day visitor spend)
- Visiting friends or family (10.2% of total day visitor spend)
- Going for a night out (10.2% of total day visitor spend)
- Going out for a meal (9.3% of total day visitor spend)

Day visitor spend is lower on other activities such as undertaking outdoor activities (5.9% of total spend), going to visitor attractions (5.4% of total spend) and attending public events (2.1% of total spend).

It is also notable that 46% of 2013 day visits in Scotland were made to cities or large towns; 22% were made to small towns; 22% were made to villages or the countryside; and 8% were made to the seaside or coast.

Overall, these figures illustrate the importance of day visitor markets to Scottish tourism with day visitor numbers far exceeding those of overnight visitors and overall day visitor spend being slightly above that of overnight visitors.

3.2. National Tourism Strategy

The Scottish tourism industry has adopted a strategy for growth that is articulated in the Scottish Tourism Alliance document, “Tourism Scotland 2020 – The Future of Our Industry, In Our Hands”, which identifies Scotland as having four main groups of tourism assets –

- Nature, heritage & activities.
- Destination towns & cities.
- Events & festivals.
- Business tourism.

The strategy identifies a need for collaboration across these different assets to offer visitors a diverse range of authentic experiences – that is, experiences that are unique to Scotland and

cannot be easily replicated by our competitors. The strategy outlines four key areas that must be addressed to deliver growth –

- Leadership & collaboration where the tourism industry works to a common agenda.
- Quality and skills where the industry commits to delivering consistently high quality experiences to all visitors.
- Marketing where market intelligence is used to align our tourism offer with visitor expectations through presenting Scotland’s assets as experiences.
- Sustainable tourism where the industry minimises its impact on the environment and connects with local communities to deliver real benefits.

It is anticipated that the greatest growth in tourism spend in Scotland will be generated from the domestic UK market, followed by our near neighbours in continental Europe. Smaller levels of growth are projected from our distant cousins – i.e. English speaking countries with strong ties to Scotland such as USA, Australia and Canada – and the emerging BRIC markets.

Overall, the strategy outlines an ambition to make Scotland 2020 -.

“A destination of first choice for a high quality, value for money and memorable customer experience, delivered by skilled and passionate people.”

3.3. Key Market Segments

In 2006, VisitScotland adopted a new segmentation model to direct its UK marketing communications and spend. This sought to split UK visitor markets into a number of different segments that offered that greatest opportunities to attract new visitors to Scotland.

This model was reviewed and replaced in 2014 with a new model that was implemented for 2015 UK marketing. VisitScotland has now identified 5 segments which it believes will provide the greatest return on marketing investment. These are as follows.

3.3.1. Adventure Seekers

Affluent, energetic and sociable individuals seeking an active holiday where they can enjoy both outdoor and cultural activities that energise them by pushing their limits and experiences. They have a younger age profile than other segments and are the segment most likely to have children at home. They are most likely to visit Scotland on a short break on 1 – 6 nights and are looking for breathtaking scenery and landscape, lots of new and interesting things to discover, and a great range of outdoor activities. 1.2 million UK households fall into this segment.

3.3.2. Curious Travellers

Individuals with a great curiosity about the world who look to broaden their minds, educate and revitalise themselves by exploring new destinations and trying new things. They are concentrated in the middle to upper age bands and mainly live in adult only households. They are most likely to visit Scotland on a short break of 1 – 6 nights and are looking for new and interesting things to discover, breathtaking scenery and landscape and fascinating history and culture. 1.9 million UK households fall into this segment.

3.3.3. Engaged Sightseers

Friendly, down to earth individuals who may be quite traditional in their outlook and fairly settled in their lifestyles. They enjoy general sightseeing on either coach trips or self-driven tours and relish engaging with locals and seeking out authentic experiences. They have an older age profile than other segments with an above average number being retired. Most are likely to visit Scotland on a short break of 1 – 6 nights, but just over a quarter may take a longer holiday of a week or more. They represent 1.0 million UK households.

3.3.4. Food-Loving Culturalists

The most affluent segment who are typically professional, career minded and discerning individuals who like to be seen as influential amongst their friends. They have a passion for food and drink but may be less active or sporty than other segments. They are typically aged 25 – 54 and live in adult only households. Almost three-quarters are most likely to visit Scotland on a short break of 1 – 6 nights and they are looking for great food and drink experiences, fascinating history and culture and breathtaking scenery and landscapes. They represent 1.6 million UK households.

3.3.5. Natural Advocates

Typically more introverted individuals who value peace and quiet and don't follow the crowds. They are passionate about Scotland and view holidays there as helping them to unwind, recharge and enjoy quiet time. They are the segment most likely to live in Scotland and mostly fall into the 35 – 54 age band. Almost half are likely to take their main holiday of the year in Scotland and they are looking for breathtaking scenery and landscapes, relaxing places to unwind and unspoilt nature. They make up 1.1. million UK households.

3.4. Key Market Trends

At the end of each year, VisitScotland publish a report on market trends identified in the previous year and predicted to influence consumer behavior in the coming year. The December 2014 report identified the following trends that were prominent over the course of 2014.

3.4.1. Mod-stalgia

Visitors embracing the past through the comforts of today and returning to previously visited destinations to reminisce about past times. This trend has supported the growth of “glamping” accommodation across Scotland – camping with comforts - and has encouraged some visitor attractions to operate out with their normal opening hours to attract different audiences, usually adult visitors coming in the evening.

3.4.2. Soul Recharge

Consumers looking to combine their vacation with fitness or wellbeing activities to escape from technology and the pressures of their day jobs. A number of accommodation providers now offer “retreat” type breaks in response to this trend, which reflects a desire to engage in the physical world once again.

3.4.3. One Foot in the Past

More focused visitor interest and history and folklore either linked to anniversaries of specific events such as Bannockburn or the First World War, or popular TV shows such as Game of Thrones and Outlander. This is a developing interest for long haul markets in particular.

3.4.4. Modern Clans

Changes in the family unit that increasingly sees larger groups of parents, children and grandparents holidaying together and showing a greater interest in introducing children to cultural experiences. This trend requires attractions and accommodation providers to consider the needs of multigenerational travel groups.

3.4.5. Techspectations

Growing numbers of consumers now depend on their smartphones and tablet devices and seek to use them at all points of travel. The basic Wi-Fi packages available today in free zones may not always meet expectations and, while the hospitality sector appears to be trying to respond to consumer demand, the poor mobile coverage in some rural parts of Scotland is an issue.

3.4.6. Immediacy Culture.

Consumers are becoming wise on how to “play the game” when it comes to purchasing items on line including holidays and short breaks. They will book their holiday dates well in advance but wait as long as possible before making a booking in order to get the best possible deal for a range of different destination options. The younger generation in particular is more adventurous and open to new developments on technology and communication.

Key trends that are predicted to come to the fore in 2015 include –

- ***Emotional Uncertainty*** where consumers become increasingly uncertain about how much discretionary money they may have to spend on things like holidays and short breaks, as they face low interest rates and increased care costs for elderly relatives.
- ***Selective Authenticity*** where individual consumers define authenticity differently with some finding it in traditional aspects of life and others in contemporary culture.
- ***Provenouncement*** where consumers increasingly link food provenance to health and wellbeing and understand its connections to the landscape. Research has found that international visitors to Scotland shop for food-based souvenirs more than visitors to other areas of the UK.

- **Value Disparity** where consumers rebel against unnecessary or hidden costs and reward quality through patronage. Consumers will set budgets and hunt for bargains, but do not race to the bottom in terms of price.
- **Personalised, Augmented Experiences** where more customers expect individual services and attention and customer relationship management allows personalisation of offers to become mainstream.
- **Consistency, Consistency, Consistency** where consumers have less patience with variability in service delivery. Globally, in 2013, 66% of consumers switched brands due to poor customer service.
- **Power of the Purple Pound** where an increasing number of travelers will have a recognised accessibility need. There are 11.9 million disabled people in the UK with an estimated collective disposable income of £80 billion p/a. It should be noted that, in 2013, only 6% of trips to Scotland that included disabled visitors had someone with a mobility impairment.

3.5. Tourism in Edinburgh

It is anticipated that the majority of visitors who use the Borders Railway to travel to Midlothian and Scottish Borders will travel from and, most likely, be based in Edinburgh. Therefore, it is perhaps useful to look at tourism in Scotland's capital city.

We have referred to the VisitScotland "Tourism in Edinburgh 2011 – Facts & Insights" factsheet, which was published in January 2013 and appears to be the most up to date information available through the national tourism agency. The table below summarises figures for 2011 and provides figures for the whole of Scotland as a comparison

Table 3.5. Volume & Value of Tourism in Edinburgh

Statistic	Edinburgh Total in 2011	% of Edinburgh 2011 Total	% of Scotland 2011 Total
No. of GB overnight visitors	2,345,000	64%	85%
No. of International overnight visitors	1,342,000	36%	15%
Total no. of overnight visitors	3,687,000	100%	100%

No of GB visitor bednights	5,478,000	48%	72%
No. of International visitor bednights	5,825,000	52%	28%
Total no. of bednights	11,303,000	100%	100%
GB overnight visitor spend	£551 m	48%	67%
International overnight visitor spend	£609 m	52%	33%
Total visitor spend	£1,160 m	100%	100%

The figures in Table 3.5 illustrate that international visitor markets are proportionally much more important and valuable to Edinburgh than to Scotland as a whole. This is reinforced by the finding that Edinburgh has consistently remained the second most popular UK city for international overnight visitors for more than a decade.

In terms of the domestic Great Britain market, visits from England represented 63% of the total visits to Edinburgh from the GB market in 2011.

In terms of international markets, the main countries of origin in 2011 were USA (16% of all international visits); Germany (13% of all international visits); and Ireland (9% of all international visits). Spain, France and Australia were the next most important international markets.

The average length of stay in Edinburgh by British visitors in 2011 was 2.3 nights. The average length of stay by international visitors was 4.3 nights. Both figures highlight the importance of short break markets to the city, although the international figure will include visitors who stay in Edinburgh as part of a longer visit covering different areas of Scotland.

In terms of day visits to Edinburgh, in 2011 there were 19 million day visits to the city, which generated a total spend of £1,214 million. The average distance travelled by day visitors was 58 miles.

4. CURRENT MARKET POSITION & MARKET TRENDS – THE LOCAL PICTURE

If the accuracy of national tourism statistics can be questionable, this issue is even more pronounced at regional and local level, where many statistics are derived from national surveys and are drawn from what are often very small sample sizes at local level.

In addition, while VisitScotland produce regional tourism statistics for Scottish Borders, there are no such statistics for Midlothian which is included within the larger Edinburgh & the Lothians area, where Midlothian elements will be somewhat swamped by figures relating to Scotland's capital city and most visited tourism destination.

In order to provide some sort of commonality of statistics across Midlothian and Scottish Borders, we have elected to work with STEAM (Scottish Tourism Economic Activity Monitor) figures for 2009 – 2013 which facilitate a longer term analysis of destination performance and market trends and are available for both areas. While there may be some questions about the absolute volume and value figures that STEAM produces, it is the most robust means of tracking trends over a period.

We have sought to complement the STEAM figures with findings from the most recent visitor surveys carried out in both areas.

4.1. *Midlothian*

4.1.1. Trends in Volume & Value

STEAM figures for the economic impact of tourism in Midlothian indicate that combined direct and indirect visitor spend in the area rose from £83.66 million in 2009 to £103.00 million in 2013 – a rise of 23.1% over a period when national inflation rose by 15.3%. Over the same period, the number of visitors to Midlothian rose by 6.0% and the number of visitor days spent in the area rose by 4.6%.

These figures indicate relatively small but encouraging long term growth in the volume and value of tourism in Midlothian. The biggest increase has been in the number of day visitors to the area in the last two quarters of the year. Day visitor numbers in July – September rose by 15.8% between 2009 and 2013, while day visitor numbers in October – December rose by 27.2% in the same period.

In 2013, day visitors accounted for 80% of visitor numbers to Midlothian, 50% of visitor days and 36% of total visitor spend in the area. Overnight visitors accounted for 20% of visits, 50% of visitor days and 64% of visitor spend. A third of visitors staying overnight in the area stayed with

friends or relatives. These figures highlight the relative importance of both the day visit and VFR markets to Midlothian.

STEAM figures indicate that Midlothian has a fraction under 1,000 commercial bedspaces available to visitors, which are broadly split equally between serviced and non-serviced accommodation. The majority of serviced accommodation is in smaller properties with 25 rooms or less. There are few larger scale accommodation providers in the area.

4.1.2. Visitor Profiles

The most recent visitor survey of Midlothian was conducted in 2004, over 10 years ago which, in practical terms, makes it almost a historic document. This survey also covered East Lothian and West Lothian, both of which conducted more recent visitor surveys in 2011. The Midlothian Tourism Action Plan 2013 – 15 states that these and other recent surveys show little change in visitor profiles since 2004. Therefore, in the absence of any more recent information, the 2004 survey figures are the best available for Midlothian.

The 2004 survey indicated that just over half of all visitors to Midlothian were aged over 45 and only 5% were aged under 25. On average, overnight visitors were older than day visitors.

Almost three-quarters of visitors were in the ABC1 socio-economic class. 38% were empty nesters, compared to 34% who had families living at home and 11% who were categorized as independent adults.

44% of visitors were from other areas of Edinburgh & the Lothians. 10% were from Strathclyde and both Fife and Scottish Borders generated 8% of visitors to Midlothian. Overall, nearly four out of five visitors to Midlothian were from other parts of Scotland. 86% were on a repeat visit to the area. Three-quarters of the repeat visitors had most recently visited Midlothian earlier in the same year (the survey was conducted in June – November).

The most popular visitor activities in Midlothian were –

- General sightseeing & touring (34% of visitors)
- Visiting the countryside or country parks (25% of visitors)

- Going to craft centres/shops (19% of visitors)
- Leisure shopping (16% of visitors)
- Walking/rambling/hillwalking (13% of visitors)
- Visiting gardens (12% of visitors)

Overall, the findings of the visitor survey appear to indicate that Midlothian is heavily – perhaps overly - dependent on visitors from Scotland and struggles to attract younger visitors. However, the area appears to generate a high level of repeat visits and general sightseeing and “soft” outdoor activities appear to be the main draws bringing visitors into the area.

In light of the recent developments of facilities for younger markets in Midlothian, e.g. Ryze Edinburgh and Transgression Park, it may be interesting to examine how these more historic findings might compare with a more contemporary visitor survey.

4.1.3. Tourism Strategy

The Midlothian Tourism Action Plan is a strategic document that has been adopted by Midlothian Council and the industry-led Midlothian Tourism Forum. This Action Plan sits within the framework outlined in the national “Tourism Scotland 2020” strategy and outlines aspirations to –

- Provide authentic experiences through the development of heritage trails and cycle and walking paths, as well as initiatives to promote and attract visitors to town centres.
- Expand the area’s existing portfolio of events and festivals by introducing a new Midfest arts festival; expanding the Midlothian Science Festival; and developing new events at key local facilities such as Vogrie Country Park and Midlothian Snowsports Centre.
- Develop the business tourism sector by building on the area’s world leading research institutes in the fields of biotechnology, genetics and animal bioscience.

- Improve the customer journey through: developing and promoting the local food and drink offer; enhancing public transport information for visitors; maximising the benefits the new Borders Railway can offer the area; and redeveloping the Visit Midlothian website while exploring the opportunities around social media and mobile technology.
- Build the area's tourism capabilities by: working with partners to improve customer service through training programmes that attract new talent into the local tourism industry; examining the potential to establish a Midlothian Tourism Academy; and attracting new hotel developments capable to catering for business and group tourism markets.
- Enhance the area's tourism profile by: undertaking marketing to target day visitors, short break visitors and special interest visitors keen on outdoor pursuits and heritage; developing an annual partnership programme of marketing initiatives with VisitScotland; and working across local authority boundaries to develop collaborative initiatives based on the series of Scottish Government themed years.

Overall, the Midlothian Tourism Action Plan 2013 – 15 outlines 39 different actions that will be progressed to grow tourism in the area. It is currently unclear what plans will be developed for the period after 2015.

4.2. Scottish Borders

4.2.1. Trends in Volume & Value

STEAM figures for the economic impact of tourism in Scottish Borders indicate that combined direct and indirect visitor spend in the region rose from £166.94 million in 2009 to £183.59 million in 2013 – a rise of 10% over a period when national inflation rose by 15.3%, resulting in a small reduction in visitor spend in real terms. Over the same period, the number of visitors to Scottish Borders fell by 2.9% and the number of visitor days spent in the area fell by 7.1%.

These figures are broadly in line with national trends that show a small drop in visitor numbers, a larger decline in the number of visitor days, and a small drop in the real term value of tourism across Scotland between 2009 and 2013. As previously stated, this largely reflects the sustained national economic downturn which has affected all industrial and commercial sectors.

While there has been a modest drop in the annual number of day visitors between 2009 and 2013 (down by 1.7%), there is a much more pronounced drop in the number of overnight visitors (down by 5.1%) and the number of days they spend in the region (down by 9.7%).

The greatest decline in visitor numbers since 2009 has been recorded in the 2nd Quarter of the year (April – June) and the 4th Quarter of the year (October – December), where December appears to be a strong month for day visits but day visitor figures for October are particularly poor.

In 2013, day visitors accounted for 66% of visitor numbers to Scottish Borders, 35% of visitor days and 29% of total visitor spend in the region. Overnight visitors accounted for 34% of visits, 65% of visitor days and 71% of visitor spend. Overall, overnight visitors represent a more significant proportion of tourism business in Scottish Borders than in Midlothian.

7% of overnight visitors in Scottish Borders stay with friends or relatives. This compares to 32% of overnight visitors in Midlothian and indicates that the VFR market is proportionately much less important in Scottish Borders.

STEAM figures indicate that Scottish Borders has almost 14,000 commercial bedspaces available to visitors – 14 times the accommodation stock of Midlothian. The non-serviced accommodation sector is of particular importance to Scottish Borders and represents 58% of all accommodation establishments and almost 69% of all bed spaces. Self catering properties provide 43% of all available bedspaces, while camping and caravanning parks provide just over 25%.

In the serviced accommodation sector, the greatest proportion of bedspaces (47%) are provided by guest houses and B&Bs. However, unlike Midlothian, Scottish Borders does have a number of larger hotels with hotels with over 50 rooms providing almost 18% of serviced accommodation bedspaces.

The importance of the non-serviced accommodation sector to Scottish Borders is emphasised by separate VisitScotland occupancy figures for the region which show that hotels and guest houses achieve average annual occupancy levels well below the Scottish average, while self catering properties show an average annual occupancy significantly above the Scottish average.

4.2.2. Visitor Profiles

VisitScotland conducted a major visitor survey across Scotland in July – October 2011. This included a survey of overnight visitors to Scottish Borders.

The 2011 VisitScotland survey indicated that 50% of overnight visitors to Scottish Borders are from other parts of the UK, 39% are from other parts of Scotland and 11% are from overseas. Scottish Borders is more reliant on UK and Scottish visitors than Scotland as a whole.

The age profile of visitor to Scottish Borders is older than Scotland as a whole with 31% of visitors being aged 55 or over and only 8% being in the 16 – 24 age group.

The top reasons given by visitors for choosing to come to Scottish Borders were –

- The scenery and landscape (cited by 35% of visitors)
- It's an area I know well (cited by 17% of visitors)
- To enjoy a specific activity (16% of visitors)
- History (16% of visitors)
- To visit a particular attraction (16% of visitors).

Mountain biking and hillwalking were the most frequently mentioned activities, while Melrose Abbey was the attraction most likely to influence a visit to the region.

In terms of the most popular activities on visits to Scottish Borders, they were –

- Visiting a historic property (49% of visitors)
- Sightseeing (38% of visitors)
- Trying local food (38% of visitors)
- Visiting an abbey or church (34% of visitors)
- Undertaking a short walk (31% of visitors)

- Undertaking a long walk (29% of visitors)
- Mountain biking (20% of visitors)

These figures highlight the importance of both heritage and outdoor activities to overnight visitors to Scottish Borders.

The survey also noted that most overnight visitors to Scottish Borders visit the region as part of a wider visit. 30% are touring Scotland and 24% are visiting both a city location and the surrounding countryside.

We have been unable to source any robust data that enables us to profile day visitors to Scottish Borders with any confidence. However, anecdotal evidence collected from stakeholders and local operators suggest that, as could probably be anticipated, the neighbouring areas of Edinburgh & the Lothians and North East England are the main sources of day visitors. However, a number of operators advise us that outdoor activities, and mountain biking in particular, can attract noticeable numbers of day visitors from further afield in Scotland and Northern England.

4.2.3. Tourism Strategy

Scottish Borders Tourism Partnership, which brings together private and public sector representatives, has developed and adopted a Scottish Borders Tourism Strategy 2013 – 2020 to provide a framework to guide and inform activities within the region's tourism sector. This strategy aims to mirror the structure, content and aspirations of the national "Tourism Scotland 2020" strategy. It is intended to revisit and review the Scottish Borders strategy in 2016.

The strategy sets out a vision to,

"Grow tourism visits and spend in the Scottish Borders, through positioning and promotion as a sustainable, year-round destination, which capitalises on its unique geography, heritage, natural environment and people".

The strategy incorporates the following strategic targets –

- To increase accommodation annual occupancy levels across the Scottish Borders by 10 – 15% by 2020.

- To increase visits to visitor attractions by 5% and visits to activity venues by 10%.
- To increase incremental spend in visitor attractions by 5%.
- To increase accommodation occupancy levels between October and May by 10%.
- To increase average overnight visitor spend by 10% above inflation by 2020.

Overall, these targets combine to produce a 2020 targeted growth in the Scottish Borders tourism economy of circa 20 – 30%, which is in line with national growth aspirations.

5. SUMMARY OF THE AUDIT OF TOURISM PRODUCTS & SERVICES IN MIDLOTHIAN

5.1. *How the Audits were Compiled*

The audits of tourism products and services in both Midlothian and Scottish Borders were compiled in the same way.

Desk research was undertaken to identify facilities and services that are unique to each area and likely to be of interest to visitors. This research compiled data from tourism related websites such as visitscotland.com and [Tripadvisor](http://Tripadvisor.com) as well as more local, commercial, visitor oriented websites. We also searched on general online business listings including thomsonlocal.com, yell.com and inuklocal.co.uk; on local trader association websites where these exist; and on social media sites such as Facebook.

In addition, we noted all facilities highlighted by stakeholder consultees and also noted relevant facilities that we identified on the mystery shopper visits that we outline in Section 9 of this report.

All facilities that we identified through desk research or otherwise were researched online in detail to try to confirm details such as opening hours, product offer, contact details etc.

From the outset, we must stress that no audit compiled in this manner will ever be 100% accurate. Facilities with no or little online presence may not be identified and smaller facilities in remote rural areas and out with the main town centres may not have been picked up in the mystery shopper visits.

Conversely, there may be some facilities included in the audit which should not be there. It is unclear how up to date and accurate many of the commercial listing websites are and some facilities listed on them may now be closed. We also note that a number of commercial listing websites quote different details for individual facilities, particularly different phone numbers and opening times.

In addition, we have used a degree of subjective judgement regarding what should and should not be included in the audit. Otherwise, the audit could have ended up as simply a directory of every shop, every bar and every taxi company in both areas.

We have sought to include only those facilities that, in our judgement, are most likely to attract discretionary visitor spend, offer something unique or different to what is available throughout the UK, and/or are actively targeting visitor markets.

Therefore independent, locally owned cafes and restaurants are included while chain catering outlets such as McDonalds and Costa Coffee are not. Craft shops are included while newsagents are not.

There are always grey areas in subjective judgement, but our approach has been one of “if in doubt, put it in the audit”. Therefore, we believe the two audits are a meaningful reflection of the range and diversity of visitor products and services in both areas.

The detailed audits for both Midlothian and Scottish Borders are included as appendices to this report.

5.2. *Tourism Products and Services in Midlothian*

In total, the audit exercise identified just under 280 tourism products and services in Midlothian. The main findings of the audit are as follows.

- Midlothian has a relatively limited accommodation base. In particular, it lacks larger hotels capable of accommodating business or leisure tourism groups of any significant

size and has very little provision for the caravanning and camping sector. In addition, there is only small scale self-catering accommodation and no hostel or bunkhouse accommodation. Overall, there is probably scope for new developments of scale in almost every accommodation sector, especially given the potential to attract overnight visitors out of Edinburgh city centre through price pointing and imaginative packaging that combines city and countryside experiences.

- Midlothian has limited cultural and heritage product. In terms of year-round facilities, Rosslyn Chapel is the only heritage facility of regionally significant scale and the National Mining Museum Scotland is the only museum or heritage centre of national or regional significance. There may be particular opportunities to develop additional heritage clusters around the new developments at Dalkeith Corn Exchange and Dalkeith Country Park and in and around Gorebridge.
- One area of heritage product where Midlothian has a distinctive strength is its historic properties that have been converted into high quality hotels catering for high yield guests, functions and smaller corporate events – Borthwick, Dalhousie and Melville. Both Dalhousie and Melville are effectively small scale resort facilities. To these could be added the historic properties of Newbattle Abbey and Oxenfoord Castle which cater for groups and corporate events respectively and the Mansion House of Kirkhill, which is available for exclusive use bookings.
- Midlothian has something of a dearth of dedicated indoor venues for cultural activities such as cinema, theatre and music. This may be because of its proximity to Edinburgh's extensive range of venues. However, a stronger year-round cultural programme of events and activities could possibly be developed if suitable venues were available or could be adapted from existing facilities with spare capacity.
- Midlothian has a strength in its range of facilities for less common activities that appeal mainly to younger visitors. Examples include the Rize Edinburgh trampoline centre and Transgression Park indoor biking centre at Mayfield; Midlothian Snowsports Centre; and Edinburgh Combat Centre at Lasswade. Edinburgh Butterfly & Insect World at Lasswade could also be considered a facility of particular interest to younger visitors. Overall, Midlothian is well positioned to attract family groups for day visits that combine adrenaline activities with other elements of the local visitor experience. The growing

number of family-friendly restaurants and bars in the area could perhaps collaborate with activity centres to develop incentives and packages that keep visitors in the area longer.

- Midlothian has large retail complexes at Straiton and Melville Nurseries. While these will undoubtedly have impacted upon the retail offer of nearby town centres, these complexes are probably the most visited facilities in Midlothian and appear to act as focal points for new investment in facilities such as family-friendly restaurants and bars. Initiatives are maybe needed to showcase other elements of the Midlothian visitor experience at these complexes in order to keep and disperse visitors to other parts of the area.
- Midlothian has a surprisingly limited range of artists' galleries and studios and independent speciality shops. Such facilities could play a role in creating greater vibrancy and animation in town centres that have been hit by large out-of-town retail complexes and there could be scope to create at least one complex of incubation units and pop up retail facilities for local artists and craft workers. It is understood that some units in the Courtyard at Dalkeith Country Park may be aimed at this sector and there may be scope for further development of such facilities at other locations that already attract significant visitor numbers.
- There is a lack of large meeting and conference facilities in Midlothian, which is somewhat surprising given its proximity to the major business tourism destination of Edinburgh and the cluster of world renowned life science centres and businesses near Roslin and Penicuik. Our understanding is that, at present, any large meetings or conferences that are generated through this cluster are currently held in Edinburgh city centre. There would appear to be an opportunity to develop enhanced conference and meeting facilities in Midlothian, perhaps in tandem with new, larger scale hotel accommodation.
- Midlothian's food and drink offer is somewhat under developed with limited local membership of schemes like AA Rosettes and Taste our Best. It would appear that, with a few exceptions, restaurants, cafes and bars largely cater for local resident rather than visitor markets. We note that a couple of relatively new operators in this sector are planning new food and drink related events during 2015. There may be scope to develop such events further to involve more local businesses and opportunities for greater joint

promotion of quality, independent restaurants and inns that could become food destinations in their own right.

- Midlothian's events portfolio is somewhat under developed with the only visitor oriented events of scale being those managed by Midlothian Council and those held at Dalkeith Country Park. The new developments at Dalkeith Country Park are likely to enhance its potential to attract and accommodate large scale outdoor events and it will be important to ensure that the park is supported in its efforts to develop its event portfolio and that all sectors of the local tourism industry are geared up to service the additional visitors that it could attract. There may also be scope to develop new local events that link into and complement the themes of Edinburgh's well developed and internationally renowned festivals. This could help to draw additional cultural visitors out from the city.
- Midlothian has a strong base of local businesses supplying and servicing the cycling sector. This could be built upon to attract more novice cyclists to the area. The area's current portfolio of cycle tracks is suitable for family groups looking for relatively easy routes that take them to interesting places. There may also be scope to attract less committed walkers and horse riders to facilities such as Pentlands Hills Regional Park to sample outdoor activities and combine easily accessible Scottish countryside with city and urban visitor facilities. Some improvement and theming of path networks may be needed to create stronger motivations to visit.
- Midlothian has an extensive public transport system of regular buses, taxis, chauffeur drive and coach hire companies. This will complement the new Borders Railway and could play an important role in facilitating onward journeys from new railway stations. Further planning is required to ensure existing public transport services align and integrate with the new train services.
- Finally (although this is somewhat outwith the remit of this audit) we note that a significant number of local visitor facilities promote themselves as being Edinburgh rather than Midlothian based. Examples include Edinburgh Butterfly & Insect World, Ryze Edinburgh and Edinburgh A7 Premier Inn. We also note that adjoining facilities may give different location names in their addresses with, for example, neighbours describing themselves as being in Dalkeith or Lasswade or Mayfield or Newtongrange. While we appreciate local sensitivities, we suggest there may be advantages from a

visitor perspective to establishing a clearer, common identity for the urban conurbation that spreads along the south edge of the Edinburgh city bypass and will soon be augmented by the proposed new housing at Shawfair and in other local communities.

6. SUMMARY OF THE AUDIT OF TOURISM PRODUCTS & SERVICES IN SCOTTISH BORDERS

Given the size of Scottish Borders, it was agreed that the audit of tourism products and services should focus on those areas of the region within 20 miles of the new railway, which are not served by other rail links such as the main East Coast line. This means that major towns such as Hawick, Jedburgh, Kelso and Peebles are all included within the audit, but other areas like the Berwickshire coast and the most westerly parts of the region are not.

Some exceptions have been made where facilities outwith the 20 mile radius are considered to be of regional significance or link into other facilities closer to the railway. Examples include the 7Stanes centre at Newcastleton and Dawyck Botanic Gardens.

In total, the audit has identified almost 1,300 tourism products and services in Scottish Borders. This is a much greater number than in Midlothian, but this could be expected given the larger size of the region and the greater value of visitor spend that it attracts.

The main findings of the audit are as follows.

- Scottish Borders has an extensive stock of high quality serviced visitor accommodation. However, most of this is relatively small scale and there are a limited number of hotels with capacity to accommodate leisure or business tourism parties of any size. The largest towns in the region – Galashiels and Hawick – have less hotel accommodation than could be expected, as does Jedburgh. There are no national budget hotel chains such as Premier Inn and Travelodge represented in the region, and only two national branded hotels (Macdonald, Mercure). There would appear to be opportunities for the development of additional, economy, branded hotel stock in some parts of the region.
- Similarly, Scottish Borders has an extensive range of self catering accommodation that is spread throughout the region. The importance of this sector is highlighted in the

proportion of visitors who stay in self catering properties. However, again most of the current stock is in individual properties or small complexes. There are none of the larger holiday park complexes of self catering cottages or lodges that one finds in many other parts of the UK. Given the strong demand for self catering accommodation, there may be potential to develop one or two larger self catering complexes, particularly if they can be aligned to the outdoor activities in which the region excels.

- Scottish Borders has excellent provision for the caravanning and camping sector but, surprisingly, virtually no hostel or bunkhouse accommodation other than one bunkhouse within the area covered by this audit and one small, independent hostel outwith the audit area. This is particularly surprising given the range of facilities the region has for outdoor activities such as walking and cycling and is contrary to trends in areas such as the Highlands, which have seen a marked increase in the supply of good quality hostels, often offering double or family rooms and ensuite facilities, as well as dormitories. The recent development of a number of small pod complexes may cater for some of those outdoor enthusiast visitors looking for basic, low cost, but comfortable accommodation. However, in our judgement, there will be latent demand for additional bunkhouse and hostel accommodation in the region.
- Scottish Borders has an exceptional outdoor activities product. In some places, such as the angling on the River Tweed and the mountain biking at the 7Stanes, it is world class. There may be opportunities to integrate this outdoor product more effectively with other elements of the visitor experience. We note that many of the outdoor facilities are positioned to primarily appeal to committed activity markets. While this is important for the overall profile of the region as a destination for outdoor activities, there may be opportunities to attract less committed and novice activists by combining “softer” outdoor facilities with heritage, cultural and food and drink products to offer themed packages that provide a variety of different experiences that can be easily accessed by visitors. These packages could also incorporate some form of transport between different facilities and could be targeted primarily at family groups.
- Scottish Borders has an extensive range of indoor sports facilities, which are mostly run by Borders Sports & Leisure Trust. These facilities are fairly traditional with swimming pools, games hall, fitness gyms etc. There may be potential to develop new indoor sports facilities that can provide wet weather alternatives to the excellent outdoor

facilities. We are thinking of examples like indoor climbing walls, trampoline centres and indoor bike centres like Transgression Park in Midlothian that appeal mainly to younger audiences. We note the number of large, disused mill premises in the region and wonder if any of these could be suitable for redevelopment as indoor sports facilities.

- Scottish Borders has a strong built heritage product of great houses and ruined abbeys. However, much of this operates seasonal opening only and is somewhat traditional in its presentation. We appreciate that there are costs and risks to extending the opening periods of such properties but, given that heritage is a key theme in the tourism promotion of Scottish Borders, there may be opportunities to extend opening times to attract and accommodate the additional off peak visitors that the new railway may bring. We also note that a number of built heritage facilities have developed events programmes and ancillary facilities for activities, speciality shopping and cultural experiences. There are perhaps opportunities to promote those ancillary facilities more extensively to present visitors with packages of different types of experiences at one location.
- Scottish Borders has an exceptionally strong art galleries/studios and speciality shopping product. In some places it is amongst the best in Scotland and provides high quality animation and colour to towns such as Kelso, Melrose and Peebles. There should be opportunities for greater collaboration and joint promotion within these sectors particularly across different parts of the region. This could create additional motivations for longer stays. There could be opportunities to work with these sectors to develop temporary pop up units to provide more vibrancy and colour in other local town centres with large numbers of empty retail premises – Galashiels and Hawick in particular. There may also be potential to create more cultural activity packages where visitors come for short breaks or holidays to learn skills such as painting, pottery, creative writing or whatever.
- The region has a very strong and imaginative events portfolio. We particularly note the importance of Springwood Park in Kelso as the main regional venue for larger scale outdoor events, the imaginative event programme developed at Traquair House and the 13 race days at Kelso Racecourse, mostly in the winter. Events create additional motivations to visit a region and there should be potential to enhance other existing local events to create greater animation and wider visitor interest. There is also potential to

create additional or higher yield short break packages around local events by linking them to other elements such as fine dining, evening visits to heritage facilities and guided walks.

- The region has a diverse and very strong food and drink product, with interesting new restaurants, cafes and retail outlets that place greater emphasis on local provenance. However, we note that food and drink does not appear to be a strong theme within the majority of local events. There could be opportunities to enhance the visitor experience of local events through developing their food and drink offer. Similarly, there may be potential to develop new events whose primary theme is food and drink. This has been done successfully in many other parts of the country that now have regular Food Festivals.
- The night time visitor economy of Scottish Borders appears to be under developed and rather traditional. The evening visitor offer appears to focus mainly on eating and drinking with a few cultural and indoor sports venues that offer evening performances or opening. Given that the Borders Railway will run regular trains until after 2300, there should be potential to attract evening visitors out of Edinburgh. The region's evening offer may need to be strengthened to attract significant numbers. Greater joint promotion of quality food and drink products may help to raise the region's profile as a food destination, which is attraction to younger markets and, again, event development could play a role in strengthening the evening economy, perhaps through collaborations between the food and drink, cultural and built heritage sectors.
- Overall, Scottish Borders has a relatively strong public transport network with regular bus services along artery routes linking the main towns and providing direct links into Edinburgh. These are complemented by a good range of local taxi services. We note the development of the new transport interchange at Galashiels railway station, which should facilitate easy onward travel for visitors arriving by train. However, we would note that services are much less regular off the main routes and in more rural areas where a significant proportion of visitor self catering accommodation is located.

7. SUMMARY OF STAKEHOLDER CONSULTATIONS

As part of this project, we were asked to consult with a number of key private and public sector stakeholders who could provide information and/or opinions about the business development opportunities that the Borders Railway could generate.

In total, we conducted over 30 consultations with 37 individuals representing 26 different agencies, organisations or businesses. Each consultation was conducted on the understanding that all comments and remarks would be non-attributable. A list of all consultees is provided as an appendix to this report.

The key findings of these consultations are as follows.

1. Railways usually generate additional journeys as they are viewed as more comfortable, quicker, more reliable and easier to use than bus services. Therefore, the Borders Railway should generate additional visits to Midlothian and Scottish Borders, rather than simply displace business from existing bus services.
2. The importance of integrated and quality onward connections from railway stations is recognised by everyone. Hop on/hop off bus services covering a variety of visitor facilities are mentioned by many as a preferred option, but most suggest that some form of subvention will be needed to support them, at least in the short term. Some consultees suggest that onward journeys are likely to be short in duration with only a minority of visitors arriving by train transferring on to longer bus journeys.
3. Integrated ticketing offers combining rail travel, onward bus travel and admission to visitor facilities will help to boost visitor numbers, It may take some time to develop such ticketing, but models are already in place elsewhere. Participation by local businesses will be key to the success of such initiatives.
4. It will be important to create a sense of welcome and arrival at the railway stations and to direct passengers to nearby facilities which might not be available at the stations themselves. Businesses are uncertain about what, if any, information provision there will be at stations
5. There is recognition that visitors staying in Midlothian or Scottish Borders may use the train to day visit Edinburgh. It is suggested that visitor journeys will not all be one-way out of Edinburgh. However, there are some concerns about the capacity of car parks at the new

stations. There are fears that parking spaces could be filled by commuters very early in the morning, leaving nowhere for visitors to leave cars when using the service to head north to Edinburgh for the day.

6. The issue of bike capacity on trains is raised by many consultees. There is widespread uncertainty about exactly what bike carrying facilities will be available and a concern that restrictions could act as a barrier for access to one of the Borders' key visitor assets.
7. Given the interest in outdoor activities, clear walking and cycling routes will be needed from each station if the railway is to attract visitors and help to keep them in the area. Such routes need to link attractions and facilities rather than just be routes for the sake of a route if they are to appeal to less committed walkers and cyclists. Heritage and other themed trails would be particularly welcome. Easy access to bike rental, of suitable bikes, is essential if there are restrictions on the number of bikes that trains can carry. However, it needs to be recognised that such bikes will only be used by the non-committed cyclist – enthusiasts will want to use their own specialist kit.
8. Tour operators are interested in day tour opportunities using the railway and onward connections. Packaging of products with discounted admission costs will be key to realising these opportunities if tours are to compete against existing offers to other parts of Scotland. However, the new railway will enable Midlothian and Scottish Borders to offer easier and cheaper access to countryside and scenery than other areas like the Highlands. Tour operators may only use the train for one leg of their journey, perhaps returning the passengers to Edinburgh by coach.
9. There is likely to be a market segment for whom the railway itself is the main attraction rather than what it gives access to. How do you get local spend out of this segment? Will local food and drink and crafts/souvenirs be available for sale on trains and at stations?
10. Many communities in Midlothian and Scottish Borders already have regular direct bus services to and from Edinburgh. There is evidence that people prefer to use one mode of transport from A to B rather than interchange from trains to buses or vice versa. Will visitors to locations away from the railway line want to travel by train if it means having to

interchange on to buses at some stage? Will this just increase journey times and complexity? How will train prices compare to current bus prices?

11. Businesses urgently want more information about the railway, particularly schedules and projected passenger numbers and patterns. They would like direct contact with Abellio to understand their plans for joint ticketing and promotions. There is uncertainty about many details of how the railway will operate and businesses still need to be persuaded of the opportunities it could offer. This is recognised by Abellio who plan activities to engage with local businesses in the near future now that they have officially taken over the ScotRail franchise.
12. Public sector bodies are concerned that businesses are not recognising the opportunities the railway can offer and are looking for public agencies or Abellio to take a lead and tell them what to do. They feel they have provided good opportunities for businesses to find out about business opportunities – but operators suggest the reverse. Businesses are cautious about committing resources to railway inspired product or marketing until they see what impact it has on visitor numbers. Businesses need time to plan activities and many are looking towards Spring 2016 rather than the opening of the railway in Autumn 2015. The majority of operators are still to buy in fully to the railway, although a handful have.
13. Some consultees have a concern that local businesses may not gear up for the opening of the railway with the result that the visitor experience may not be as good as it needs to be from the outset of the service. Some comment that Midlothian and Scottish Borders have one opportunity to “get this right” and that business could be lost in the future if the visitor experience does not deliver immediately.
14. It is generally recognised that the aim must be to generate long term tourism benefits from the railway and not to place too much emphasis on achieving a “big bang” opening that is not sustained.
15. Some consultees raise concerns about the consistency of customer service in Midlothian and Scottish Borders and identify a particular need to ensure front line staff have sound local product knowledge. Some identify opportunities to adapt existing customer service programmes that have been implemented in other parts of Scotland.

16. There are concerns that businesses and agencies appear to be “doing their own thing” in relation to the railway. There is not currently a lot of evidence of partnership working or joined up thinking.
17. There are particular opportunities for local events to work with the railway on travel/admission offers. However, many consultees consider the local Common Ridings in Scottish Borders offer limited potential to attract many genuine visitors in their current form. Midlothian currently has an underdeveloped events product. Any new events must be sustainable, which requires a bottom up approach from local communities.
18. The new developments at Dalkeith Country Park are viewed by many in Midlothian as a potential game changer for tourism in the area, particularly in terms of capacity to accommodate large events. However, it will be crucial for local businesses to collaborate with the country park.
19. Galashiels needs urgent investment if it is to act as a main gateway into Scottish Borders from the railway. At the moment it has no iconic visitor draw and lacks vibrancy with many empty shop premises and a limited evening or eating out economy. The town needs to offer more to visitors in order to encourage them to spend time there.
20. There is widespread scepticism across public and private sectors about projected numbers of tourists that the railway may carry. Stated projections are viewed as a political aspiration rather than estimates based on solid research.
21. The railway may offer additional opportunities for accommodation providers in Midlothian and Scottish Borders to attract visitors to their areas during peak seasons in Edinburgh when room rates in the city can be at their highest. The ease and frequency of travel along with the mix of city and countryside may offer increased visitor appeal. However, there is a lack of larger economy class hotels to accommodate large groups at competitive prices.
22. Evening tours out from Edinburgh are considered a possibility by a number of consultees. Good quality food and drink offers could be key to attracting evening visitors. The food and drink offer needs to be improved in some areas, although this is already happening in some places. Overall, the night time economy is weak. Both weaknesses could deter some younger visitor markets who are increasingly food conscious

23. The seasonal operation of many attractions in Scottish Borders may restrict potential to generate out of season visits through the railway. There have been some discussions among some attractions about co-ordinated openings over the winter. However, some still want to be assured of visitor numbers, although other operators are proactively driving this idea
24. Some consultees view the steam train experience that will be piloted in autumn 2015 as offering particular visitor potential, but there is concern that the proposed schedule of the service leaves very little time for visitors to see much and spend much money if they travel the full route, north and southbound. The pilot offers no stops in Midlothian and visitors would have less than 2 hours in Scottish Borders. Timings would point towards this largely being spent having lunch, particularly as an onward travel connection will be needed from Tweedbank. Some consultees anticipate that tour operators may use the steam train in one direction only to increase length of stay in the area. (We understand a full feasibility report has been commissioned on the longer term viability of the service).
25. There are very mixed views about the impact the Great Tapestry of Scotland will have at Tweedbank. While a few consultees are enthusiastic about its visitor potential, others are very sceptical about its potential tourism impact.
26. A number of consultees in both Midlothian and Scottish Borders comment that some of the local towns lack “charm” and are not immediately appealing to visitors.
27. There are some uncertainties about how Galashiels and Tweedbank will both operate as railheads. Which one will visitors be advised to use for onward connections? Will they effectively compete with each other?
28. Could the railway be used to emphasise Midlothian and Scottish Borders profile as low carbon, green destinations?
29. The launch week-end and any special events were hardly mentioned. Consultees hope and expect the launch to profile Midlothian and Scottish Borders, but no one seems too sure about what is actually planned and how businesses can align with it.

30. Marketing was seldom mentioned spontaneously (other than in the discussions with VisitScotland) which we found surprising; interviewees appeared more focused on product development and what visitors will experience. There were some references to the fact that the existence of the Borders Railway would in itself increase awareness of the Borders even if visitors did not use it, and that the Railway could increase the attractiveness of an overnight stay in the Borders as the capital could be more easily reached.

8. SUMMARY OF ONLINE BUSINESS SURVEY RESPONSES

As part of this project, an online survey was sent to all private sector operators in Midlothian and Scottish Borders for whom we were able to identify email addresses. The only private sector operators who were not sent this survey were those with whom we had already engaged through the stakeholder consultations.

The aim of this survey was to identify business awareness of and readiness for the Borders Railway and to gather a wider cross section of tourism industry views and comments on the business opportunities it may offer.

In total, online surveys were emailed to 601 private sector operators – 96 (16%) were based in Midlothian, and 505 (84%) were based in Scottish Borders.

Completed surveys were received back from 89 respondents – a 15% response rate overall. 21 completed surveys were received from Midlothian operators (a 22% response rate) and 68 from Scottish Borders operators (a 13% response rate).

Responses were received from businesses based in 15 different locations in Scottish Borders, with the greatest number of responses coming from Melrose, Jedburgh and Peebles. Responses were received from 8 different locations in Midlothian, with the greatest number of responses coming from Lasswade and Dalkeith.

Responses were received from 24 different sectors of the tourism industry, with the greatest number of responses coming from guest house and bed & breakfast operators (20% of respondents), and self catering accommodation operators (19% of respondents).

A full breakdown of respondents to the online survey is attached as an appendix to this report. Analysis of responses are outlined in a series of tables below.

Table 8.1. Are you aware that the new Borders Railway from Edinburgh to Galashiels and Tweedbank will begin operation later this year?

Response	% of Scottish Borders Respondents	% of Midlothian Respondents	% of All Respondents
Yes, I know a lot about it	49%	57%	51%
Yes, I know a little about it	43%	29%	39%
Yes, I have heard of it, but know nothing about it	4%	10%	6%
No, I have not previously heard of it	0%	4%	1%
Not sure/Don't know	4%	0%	3%

Responses show an encouragingly high level of awareness of the opening of the Borders Railway with a majority of respondents stating that they know a lot about it.

Table 8.2. From your existing knowledge, do you think the opening of the Borders Railway is likely to have any impact on your business or organisation?

Response	% of Scottish Borders Respondents	% of Midlothian Respondents	% of All Respondents
Yes, it is likely to benefit it a great deal	13%	0%	10%
Yes, it is likely to benefit it a little	26%	43%	30%
No, it is not likely to benefit it	42%	47%	43%
Not sure if and how it might benefit it	18%	5%	15%
Don't know enough to make a judgement	1%	5%	2%

Responses indicate very mixed views on the benefits that the Borders Railway is anticipated to bring to individual businesses or organisations. More respondents think the railway will not benefit their business than think it will. Only 10% of respondents expect it to benefit their business a great deal.

This suggests that many local businesses are still to be persuaded about the business development opportunities that the railway may offer.

Table 8.3. Are you planning any new marketing, product development or training initiatives to tie in with the opening of the Borders Railway?

Response	% of Scottish Borders Respondents	% of Midlothian Respondents	% of All Respondents
Yes, definitely	15%	10%	14%
Yes, possibly	25%	29%	26%
Probably not	28%	32%	29%
Definitely not	22%	19%	21%
Not sure at the moment	10%	10%	10%

Responses indicate that half of businesses (50%) are probably or definitely not planning any new initiatives to tie in with the opening of the railway. Conversely, 40% are definitely or possibly planning new initiatives.

These responses are in line with comments made in stakeholder consultations about businesses holding back from engaging with the railway until they have a clearer picture of what it may deliver in terms of opportunities and additional customers.

Table 8.4. Would you like to have more information about the Borders Railway and the support that may be available to local businesses and organisations planning new activities relating to it?

Response	% of Scottish Borders Respondents	% of Midlothian Respondents	% of All Respondents
Yes, please	58%	76%	63%
No, thank you	24%	14%	21%

Don't know/Not sure	18%	10%	16%
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Responses indicate that a majority of local businesses and organisations would like further information about the railway and the support that may be available to help them benefit from it.

Again, these responses reinforce comments made in the stakeholder consultations about a lack of detailed information about the railway.

Table 8.5. Overall, from your current knowledge, do you think the opening of the Borders Railway will help to grow and enhance tourism in Midlothian and Scottish Borders?

Response	% of Scottish Borders Respondents	% of Midlothian Respondents	% of All Respondents
Yes, definitely	35%	48%	38%
Yes, possibly	46%	38%	44%
Possibly not	12%	5%	10%
Definitely not	3%	0%	2%
Not sure	4%	9%	6%

Interestingly, respondents are much more positive about the benefits that the railway will offer local tourism in general than their own individual businesses in particular: 88% think it will definitely or possibly grow tourism. Under half of those are “definitely” persuaded, and again this suggests that business need more information about the railway and a “selling job” still needs to be done on many of them.

In addition to the questions outlined in the tables above, respondents were offered two opportunities to give open responses to questions about the railway. A wide range of topics were raised in response to these questions. Below we outline these questions and have grouped responses to identify the most common themes, issues and concerns raised.

Table 8.6. Can you suggest any new initiatives or activities that may help to maximise the benefits the Borders Railway generates for tourism in Midlothian and Scottish Borders?

Response	No of Respondents
Total Number of Individual Responses	50
Responses relating to the importance of onward travel connections from railway stations	11
Responses about the need for provision to carry bikes on trains	6
Responses suggesting running steam and charter trains on the line	6
Responses suggesting opportunities for collaboration between businesses	6
Responses suggesting enhanced visitor information on trains and/or at stations	4
Responses suggesting a need for additional marketing & promotion	3

These responses highlight the issue of onward travel facilities, which also came out as a major issue in the stakeholder consultations. Provision for bikes also comes out again as an important issue and it is interesting to note the proportion of respondents who suggest steam train services on the line. It would appear that these respondents are not aware that such services are already proposed. This reinforces the need for businesses to receive further information about the railway.

Table 8.7. Please leave any further comments you think may be helpful or of interest.

Response	No of Respondents
Total Number of Individual Responses	27
Business still need more information about the railway to be persuaded of its benefits	4
Enhanced marketing and facilities are needed to keep visitors longer in the area	4
The line will only benefit those areas close to it	3
Positive responses about the business opportunities the line will offer	3

Responses to this open question were fewer but considerably more varied, covering topics as diverse as opportunities to tap into the “railway fanatic collectable market” and concerns about inadequate housing provision in Stow.

Few clear themes came out in the responses, but the main topics raised are outlined above and, again, emphasise a desire for further information about the railway. Issues relating to perceived challenges and opportunities to keep visitors longer in the area were also raised.

Overall, the responses to the online business survey largely match and complement issues raised in the stakeholder consultations. The four main issues that appear to be coming out are –

- Local business desire for more information about the railway.
- The reluctance of many local businesses to engage fully with the railway until they are persuaded of its business benefits.
- The importance of ensuring good quality, integrated onward travel from railway stations.
- Concerns about inadequate provision for carrying bikes on trains.

9. SUMMARY OF THE MYSTERY SHOPPER EXERCISE

In the course of this project, we undertook anonymous “mystery shopper” visits to all towns and villages included in the audit of tourism products and services. The aim of these visits was to look at each location through the eyes of a visitor and to gauge the quality of the visitor experience in each community by identifying strengths that could be built upon and areas where improvements may be needed.

Particular attention was paid to public realm issues such as signage, public transport facilities and general tidiness. However, a number of individual businesses were also visited to form an impression about the overall quality of visitor welcome and customer service across both areas.

Visits were carried out in March and April, with many taking place during and around the Easter period. A number of locations were visited more than once either to confirm first time impressions or to check specific details. Brief reports on each location visited are outlined below.

9.1. Bonnyrigg

Bonnyrigg is very much part of the extended urban conurbation that spreads along the southern edge of the Edinburgh city bypass. It has very regular bus services to and from Edinburgh city centre, which arrive at a clear, focal point main street. However, this main street has little to offer visitors by way of speciality shopping or interesting food and drink outlets.

There is little architecture or heritage of any obvious visitor interest in Bonnyrigg, except perhaps Cockpen Old Parish Church, which is primarily of specialist interest and on the edge of the town with restricted access.

The main visitor facility of note is Dalhousie Castle Hotel & Spa, which is one of the largest and best quality hotels in Midlothian. It is perhaps the one of only two examples of a resort hotel in Midlothian, although it is considerably smaller than most resort hotels. It trades very much on its proximity to Edinburgh. We would question how many customers of the hotel will be motivated to venture into the centre of Bonnyrigg.

The main leisure facility of any scale is Broomieknowe Golf Club, a club with good quality facilities that welcomes visitors and operates an online course booking facility.

Other than Dalhousie Castle and Broomieknowe, it is difficult to identify any genuine visitor appeal that may attract visitors to Bonnyrigg, except perhaps as VFR visitors. The opening of the Borders Railway is unlikely to have any significant impact on visitor numbers to the town.

9.2. Dalkeith & Eskbank

As the main administrative centre of Midlothian, Dalkeith is the primary eastern focal point of the urban conurbation that extends through various adjoining communities along the southern edge of the Edinburgh city bypass.

The town centre has a pleasant public park and some appealing historic buildings, a number of which have been or are in the process of being renovated and brought into new uses. There may be scope to develop some form of heritage quarter in the town and to revitalise the existing town heritage trail, which is fairly low profile in terms of public visibility and offers limited on-site interpretation.

Unfortunately, the attractive historical architecture in and around the town centre is somewhat undermined by the less attractive, sixties, neo-brutalism of the Jarnac Court shopping area, which is where many visitors are likely to arrive in the town, particularly if they use public transport.

Dalkeith & Eskbank has a surprisingly limited range of accommodation – one mid-sized hotel and a few guest houses/bed & breakfasts, some of which may no longer be operating. There is a small, luxury exclusive use venue at the Old Mill House and some seasonally available small scale group accommodation and business tourism facilities at Newbattle Abbey College.

The town has a good choice of food & drink outlets, at least some of which appear to be actively welcoming visitors and one of which has been recognised in the local Food & Drinks Awards scheme. However, it is unclear how many of them are food destinations to which visitors are likely to travel. The local speciality shopping offer is limited.

The main visitor attraction is privately operated Dalkeith Country Park, which is located very close to the town centre and is currently undertaking a £4 million development programme to create new visitor facilities. Dalkeith Country Park is one of the key visitor attractions in Midlothian and has potential to attract increased visitor numbers for both “soft” outdoor family activities and events. It is already the main outdoor events venue in Midlothian and has potential to attract major events of national significance.

It will be important for local agencies and local businesses to work closely with Dalkeith Country Park to maximise all possible business opportunities and spin-off benefits. One early action may be to review directional signage within Dalkeith town centre, as it is currently inadequate to orientate visitors around local attractions and facilities, including the country park.

Dalkeith & Eskbank will be served by the new Eskbank Station on the Borders Railway. This is some distance from the town centre and the country park. Most visitors using the railway are likely to require onward bus travel into the town centre. The No 40 Lothian Buses service runs close to the railway station (within walking distance) and provides a link into Dalkeith town

centre (at Jarnac Court unfortunately) every 30 minutes or more regularly throughout the day. Some work may be needed to ensure timetabling of this bus service integrates fully with the scheduling of trains.

There is also a No 3 Lothian Buses service from Edinburgh city centre to Dalkeith town centre that runs every 12 minutes during the day. Average journey time is just under 40 minutes. It is questionable how well the railway will be able to compete with this bus service, which may be the better public transport option for visitors coming out of Edinburgh to visit Dalkeith Country Park and/or the town centre.

9.3. Earlston

Earlston is a visually attractive village on the A68 some 10 miles by road from Galashiels. Being on a truck road, it suffers a little from being somewhere that people pass through rather than stop at. Most visitors probably drive through it on the A68 without thinking to turn on to the surprisingly long main street.

Earlston has a limited range of visitor facilities, befitting its size as a relatively small community. Those facilities appear to be of a reasonable but unexceptional standard, although we can vouch for the friendliness of the welcome from staff and customers in the local hotel.

There are a number of waymarked walks in and around the village, but they lack any focal point to attract significant numbers of visitors other than peaceful countryside. We believe the nearby landmark of the unused Leaderfoot Railway Viaduct was once mooted for development as a bungee jumping centre. Revisiting that idea might provide Earlston with a significant attraction that would draw more visitors to the village.

Overall, Earlston is a pretty and peaceful village in a region of pretty and peaceful villages. It lacks any truly unique and distinctive facilities that will differentiate it from similar communities. We are aware of plans to exploit local Thomas 'The Rhymer' Learmont connections, which could create something distinctive and unique. However, it is maybe questionable how many people are familiar with and could be attracted by the Thomas the Rhymer legends.

In terms of existing public transport, Earlston is served by two main bus services that arrive at a well maintained and attractive bus stance in the main street close to local amenities and adjacent to a garden area and well maintained, free access public toilets.

Direct buses from Edinburgh city centre run to Earlston every hour from 0900 to 2000. The journey takes an hour and a half. There is also an intermittent bus service from Galashiels with about half a dozen buses a day and a journey that take just under half an hour. However, these services are focussed on the early morning and evening with only one or two buses a day between 0825 and 1905. Services from Galashiels will need to be enhanced if Earlston is to derive any significant benefit from the Borders Railway.

9.4. Galashiels

In population terms, Galashiels is the largest destination of the new railway within Scottish Borders region. It is already a major transport hub for local bus services and a new transport interchange is being built adjacent to the new railway station to facilitate onward travel by bus, taxi, hire car or cycle. This is a very welcome and essential facility to ensure a quality visitor experience is delivered through easy and flexible onward travel.

Galashiels has by far the most retail floorspace and the largest retail spend in Scottish Borders. Much of this is located in the Gala Water Retail Park on the edge of the town centre. While this retail park has attracted more local residents and visitors into the town, it has impacted on the traditional town centre, which is tired and quiet with many empty business premises displaying for sale or for let signs.

The town centre of Galashiels is likely to be the first impression of Scottish Borders for many visitors using the railway. It is crucial that it offers more life and animation than at present. We are aware that the Energise Galashiels business group is seeking to address this issue.

A wider range of speciality shopping – either permanent or temporary pop up units – would help to complement the mainstream, chain store retail offer at Gala Water. Additional visitor signage and interpretation may also help to enhance the overall visitor experience. Galashiels can be a surprisingly difficult town to find your way around on foot.

Galashiels has a limited range of visitor accommodation split between small, independent hotels, a variety of guest houses and B&Bs – some of them of very good standard - and a very limited range of self catering accommodation. It is unclear how many of the guest houses and B&Bs listed on online directories and review sites are actually still operating.

We are aware that sites have been identified for the development of a branded, economy chain hotel. However, to date, no operator has come forward to develop these sites, despite the opportunity to fill an apparent gap in local hotel provision.

The town lacks a must-see visitor attraction/facility. Old Gala House is an impressive building with some interesting exhibitions, but hardly iconic. It currently attracts around 5,000 visitors p/a.

The nearest attraction of any significance is Abbotsford and it is unclear if it will be served by the railway stations at Galashiels or Tweedbank. We are aware of aspirations to establish a Scottish Centre of Textiles in Galashiels, but note that plans for this are unconfirmed and any development is likely to be some years away.

The food and drink offer – while improving with the opening of some new, more imaginative eateries promoting local produce – is largely oriented to local residents rather than visitors. There is a good range of sport and leisure facilities in Galashiels but, again, we sense they are primarily used by locals rather than visitors, although there may be scope to stimulate more visitor use of local footpath networks.

For a town of its size, Galashiels has a surprisingly limited portfolio of regular events of any scale. Development of new events may be crucial to providing more colour and animation within the town and presenting visitors with stronger reasons to stay.

At present, Galashiels may be a town that visitors using the railway simply pass through as quickly as possible on their onward journey to iconic attractions and facilities elsewhere. The town centre lacks life and vitality and it has a limited range of facilities that are likely to attract and retain visitors. Indeed visitors arriving on the railway may be surprised and disappointed at how little it has to offer as a destination.

Consultations with local stakeholders indicate that they are aware of the challenges and opportunities that the railway can offer Galashiels and are actively seeking to address them. Collaboration, imagination and vision will be needed if the town is to maximise the benefits it derives from the railway.

9.5. Gorebridge

Initial impressions when first coming into Gorebridge are of the scale of new housing development that is taking place on its outskirts. These may change significantly the character of the local community. At present the village feels separate, distinct and more rural than other communities to the north. This may not continue if it extends to effectively join up with its nearest neighbours.

The centre of Gorebridge and the area around the railway station is surprisingly attractive with a main street of well maintained heritage properties. The station itself is the only one on the Borders Railway that retains original buildings from the Waverley line. These are not in use at the moment and may offer scope for developing heritage or catering facilities for visitors.

The new housing developments appear to be supporting the creation of new community facilities. A community hub with a café and meeting facilities is currently being built; improvements are planned to the area around Hunter Square where buses arrive; and the local historical society are developing a heritage trail and have aspirations to establish a heritage centre.

Gorebridge currently has a limited range of shops and eating places likely to be of interest to visitors. We assume that an influx of new local residents may support the expansion of such facilities in the village.

From a visitor perspective, a key issue for Gorebridge is that its main attractions – Arniston House, Crichton Castle and Vogrie Country Park – are all located outside the village and are not served by regular, scheduled public transport. Arniston and Crichton also only open on a seasonal basis. Vogrie Country Park, by far the most visited local facility, is over 2 miles from the village and walking there involves a steep climb up from the main street and walking along public roads with no pavements.

The redevelopment of Dalkeith Country Park may impact on visitor numbers at Vogrie. Visitors (rather than local residents) looking for a day out may find Dalkeith more convenient to access, particularly by public transport, and be attracted by its wider offer

Additional public transport services and more clearly defined walking and cycling routes are likely to be needed if Gorebridge station is to act as a gateway to nearby visitor attractions. Could there be potential for a seasonal minibus service for visitors that covers a loop that links the station with Vogrie, Pathhead and Crichton?

9.6. Hawick

Hawick is at the furthest edge of the 20 mile radius from the railway that we adopted for inclusion in the audit of visitor products and services. Responses to the online business survey indicate that Hawick business are more likely to have negative viewpoints about the new railway than those in most other locations. This is primarily because the line does not extend to the town, whereas the old Waverley Line did.

Like Galashiels, Hawick is a town whose centre has a large number of empty retail premises, which creates a rather negative first impression. As in Galashiels, this issue could perhaps be addressed through encouraging temporary pop up units for local artists and craft workers.

The main arrival point for buses into the town is a line of somewhat grubby shelters next to a Morrisons supermarket on one side and overlooking the backs of buildings on the other side. It is a short walk from the main street, where there is a much more pleasant bus stance next to a garden area. Again, first impressions at the main bus stance are not great.

There are regular buses from Edinburgh and Galashiels roughly every half hour. Journey time from Edinburgh is just over 2 hours and half of the services go on to Carlisle, a further 1½ hours or so to the south. Journey times from Galashiels are around 35 minutes and integration of timetabling of rail and onward bus services from Galashiels will be essential if the new railway is to offer any significant reductions in travel times between Hawick and Edinburgh.

More positively, the town centre has a clear focal point for visitors in the excellent Heart of Hawick complex, although this some distance from the main bus stance. There are also attractive parks and gardens, and high quality visitor signage and interpretation throughout the town centre. The town has a reasonable food and drink offer that is likely to satisfy but maybe not excite visitors.

There is limited hotel capacity in the town itself, but a good range of guest houses, B&Bs and self catering properties in and around the town. There are also some interesting and imaginative camping options nearby. There may be potential for new hotel development in the town, particularly if a national chain with loyalty programmes can be attracted. In addition, new hostel or bunkhouse accommodation may cater for visitors using the extensive local networks of footpaths and cycle routes

Hawick has a good selection of speciality shops including some internationally known names, many of which are clothing outlets with links to the long established, local textiles industry. There may be scope for greater marketing collaboration between these different outlets.

We have some difficulty with the prevalent use of the word “textiles” in the tourism promotion of this sector as it suggests an industrial process. Would there be potential and local support for a collaborative promotion around the theme of “Scotland’s Cashmere Capital”, cashmere being a luxury product of interest to high yield markets?

We note the success of other destinations across the UK that have promoted themselves as book towns, food towns and outdoor capitals. Could a focus on cashmere provide Hawick with a stronger visitor market proposition that differentiates it from other destinations?

9.7. Innerleithen

Innerleithen is a large and attractive village on the main A72 road between Galashiels and Peebles. It has a good range of good quality accommodation, eating places and speciality shops for a village of its size.

The village is served by a regular bus service between Galashiels and Peebles and Edinburgh which runs every 20 minutes during the day. Journey time from Galashiels is a rather surprising 30 minutes and journey time from Edinburgh is about 1½ hours. The new rail service, which will entail an onward journey from Galashiels station, will be hard pushed to match the existing bus service to and from Edinburgh for regularity and length of journey, unless some form of more visitor focused onward service from Galashiels is developed.

Traquair House, which is the most visited local built heritage attraction and located on the edge of the village, has one of the most proactive and imaginative approaches to attracting visitors in the region and is an exemplar of what a heritage attraction can and should be. In particular, it’s development of events and ancillary facilities to complement the historic house are a model that could be replicated elsewhere.

Traquair House is complemented by two smaller scale heritage facilities of more specialist interest that attract significantly fewer visitor numbers.

Innerleithen is a major draw for cyclists with challenging off-road downhill runs that are part of the 7Stanes network for mountain bikers and an extensive range of routes for on-road cyclists. The village is known for attracting cyclists from far and near. We visited it on a warm, sunny Saturday and it was heaving with cyclists, who appeared to be split fairly evenly between mountain bikers and on road cyclists. There is a strong infrastructure of support facilities for the cycling fraternity.

We are aware of proposals to create a new bike uplift facility at the 7Stanes site. This may have potential to attract non-cyclists as well, particularly people who may use it to access some of the extensive range of local footpaths.

From observation in April, we would question the extent to which existing facilities in the village have capacity to handle significantly more visitor numbers at peak times and would suggest that any new cycling facilities must be complemented by new or extended supporting developments elsewhere in the village. That said, customer service in the facilities we visited was good despite pressures of customer numbers.

As with elsewhere in Scottish Borders, most accommodation provision in and around Innerleithen is small scale, although some of it is top quality with a good range of boutique properties and many properties offering facilities for outdoor enthusiasts. Given the popularity of Innerleithen with cyclists in particular, we suggest there may be potential to develop hostel accommodation or a larger self catering complex to link in with the excellent outdoor facilities and encourage more overnight stays rather than day visits.

9.8. Jedburgh

Jedburgh has a range of visitor facilities that most towns of its size in Scotland would envy. There are three significant heritage attractions, a prominent and friendly visitor information centre, and a good choice of eating places and speciality shops in and around the town.

Visitor arriving by bus alight at a well maintained terminus next to the main car park and adjacent to the visitor information centre and good quality, free admission public toilets. Jedburgh is served by about a dozen buses a day from Edinburgh. Half are direct and half involve changing buses at St Boswells. Journey time is around 2 hours.

There are also hourly buses from Galashiels, some of which also involve changing at St Boswells, and take about 50 minutes to complete their journey. As with other places in Scottish Borders, the new rail service is unlikely to significantly reduce public transport journey times between Edinburgh and Jedburgh, although it may offer potential for more regular services if bus timetables to and from Galashiels can be integrated fully with rail timetables.

From the bus terminus it is a short, uphill walk to the extensive ruins of Jedburgh Abbey and the main shopping street. There is good directional signage and interpretation boards, some of which provide information in a number of languages – something of a rarity in the region. A few of the interpretation boards are a little faded (they appear to have been erected in 2000) and may be coming to the end of their working life.

The main street in Jedburgh has a pleasing mix of speciality shops and places to eat, but is narrower than many main streets in other local towns. On the day of our visit, it felt a bit dark and closed in and hanging baskets and planting may help to provide a bit more colour. It is also on a slope, which may present difficulties to visitors with mobility difficulties, particularly if they want to get up to Jedburgh Castle Jail & Museum at the top of the hill. We also noted that a large and prominent hotel on the main street is now closed and starting to look a little shabby.

Jedburgh has limited hotel accommodation, but a good choice of places to stay in all other accommodation types (other than hostels or bunkhouses). Given its position on the A68 artery route between Scotland and England, it may have potential for development of serviced accommodation large enough to cater for coach parties who could use the town as a base for short breaks in Scottish Borders. There are also good local networks of routes for walkers, cyclists and horse riders who could complement coach parties.

Finally, we would also note a couple of excellent facilities located a little outside the town.

Harestanes Country Centre near Ancrum – itself an attractive village – has developed a small complex of craft studios and workshops which acts as an interesting showcase for local craft workers and complements the outdoor facilities. We spent an enjoyable time here chatting with friendly and helpful craft workers who were keen to suggest other local places to visit and give directions to them. Harestanes is an excellent example of how rural outdoor attractions can develop other complementary visitor facilities (The cake shop was excellent too!)

Along similar lines, the fairly new Born in the Borders complex on the road from Jedburgh to Hawick is a first class showcase for a range of local food and drink, which is presented well by

enthusiastic and friendly staff. Hopefully, it could provide a model for similar ventures elsewhere in Scottish Borders or Midlothian.

9.9. Kelso

Visually, Kelso is one of the most attractive small towns in Scotland with a cobbled and open main square that hosts regular local markets and is surrounded by historic buildings, one of which houses a visitor information centre.

This is complemented by well maintained parklands running down to the broad River Tweed; spectacular Floors Castle, which claims to be the largest inhabited castle in Scotland; and Teviot Smokery and Water Garden a few miles outside the town, which is one of top three most visited attractions in the region.

The town also has an extensive and varied programme of year-round events that are mainly centred on the large Springwood Park Showground and Kelso Racecourse; perhaps the most extensive choice of independent speciality shops in the region; and an excellent range of places to eat including the only restaurant in either Scottish Borders or Midlothian to be listed in the Fine Dining Guide, which combines a variety of different restaurant awards such as Michelin Stars and AA Rosettes to identify what it considers to be the best 50 restaurants in Scotland.

Kelso has a wide choice of quality accommodation in all sectors – other than hostels, although the only one in Scottish Borders is just 7 miles away in Yetholm – and has a particularly strong self catering sector. There is excellent signage throughout the town and first class facilities for all types of outdoor activities.

Visitors arriving in Kelso by bus get off at stances close to the main town square. There are free, well maintained public toilets at the bus stances, although signage to them could be improved and they are accessed down a rather gloomy enclosed passageway. Unfortunately there is a closed and somewhat derelict looking hotel next to the bus stances, which detracts from the other attractive buildings nearby and does not help to create a positive first impression.

There are hourly bus services to and from Edinburgh during the day. Some of these require a change of bus at St Boswells and journey time is slightly over 2 hours. There are also hourly day time services to and from Galashiels with a journey time of 50 minutes. These services continue on to Berwick upon Tweed, a further 55 minutes away.

As with Hawick and Jedburgh, the new Borders Railway may struggle to significantly reduce journey times between Edinburgh and Kelso unless there is very close integration of bus and train timetables. However, the new railway should increase the regularity of links to and from the capital and offer potential for some form of visitor oriented bus service from Galashiels.

There is little in Kelso of which a visitor could be critical. However, one of our visits to the town was on Easter Sunday when there was a significant number of people around the town centre and the overwhelming majority of shops and cafes – and the Visitor Information Centre - were closed.

Cyclists, motorbikers and families were milling around looking in the windows of closed shops or searching for informal and casual places to get a light lunch or snack. The local branch of Greggs Bakery, one of the few places open, appeared to be doing a roaring trade, as did the café in the local garden centre. We drove out of town to the excellent and friendly Teviot Smokery and Water Garden, which was also busy with family groups enjoying a range of different facilities including good quality local produce.

We were left wondering why Kelso businesses were not open on a major public holiday when there were obviously many potential customers in the town.

9.10. Lasswade

Lasswade is part of the urban conurbation on the south edge of the Edinburgh city bypass. We were uncertain of its status as a town in its own right as road signs welcome visitors to “Bonnyrigg & Lasswade” and it does not seem to have a clear town centre in the usual sense (unless we missed it on each of the three visits we made in search of it).

As far as we could see, the town centre comprised an attractive wooded valley with a popular but small hotel and restaurant, and another newer restaurant in a historic building, which is developing events programmes and a growing reputation that may attract visitors out from Edinburgh.

From a visitor perspective, the main facilities and attractions of Lasswade appear to be on the outskirts of the town around the ever expanding range of outlets adjacent to the Dobbies complex at Melville Nurseries and Melville Castle Hotel, which like its counterpart at Dalhousie, is a top quality small resort facility that mainly trades on its proximity to Edinburgh.

The varied and good quality facilities in and around Melville Nurseries - such as Edinburgh Butterfly & Insect World, Edinburgh Combat Centre, the Premier Inn Hotel and a choice of family friendly restaurants - are undoubtedly one of the main visitor draws into Midlothian. The expanding range of places to eat, sleep, shop and play should extend visitor length of stay in the immediate area.

The opportunity and challenge that Dobbies/Melville Nurseries offers is that of encouraging visitors who are touching the edge of Midlothian to come further into the area and explore it more. There is leaflet display and good tourist signage to other facilities in Midlothian in and around Melville Nurseries, but visitors may not initially appreciate how close many of the facilities are. Consideration could maybe be given to how Melville Nurseries can most effectively act as a visitor gateway to the rest of Midlothian.

The area around Melville Nurseries is served by the No 3 and No 29 bus services from Edinburgh city centre which run up to every 10 – 12 minutes during the day. Journey time is about 20 minutes. The area is relatively close to the new railway station at Eskbank, which will have a half hourly service from Edinburgh that will take 18 minutes. The No 29 provides an existing bus link between Eskbank and Melville Nurseries. However, it may be questionable who many visitors will use two modes of transport to make a 20 minute journey.

9.11. Lauder

Lauder is a traditional but expanding small town on the main A68 artery route. Like many communities on artery routes it possibly suffers from being a place that most travellers pass through rather than stop at.

For a relatively small town, it has a surprisingly strong range of accommodation, shopping and eating places. Those of note include: the Lodge at Carfraemill four miles to the north which attracts many functions and has a reputation as a food destination; the innovative, 5-star Airhouses self catering development, which is also to the north of the town; the Flat Cat Gallery, Bank House Living and other independent shops including a delicatessen. Somewhat unusually for a small town, it also has two caravan and camping parks.

The main visitor attraction is the nearby Thirlestane Castle, which operates very restricted opening periods – three days a week, April – September only – and hosts an annual 2 day

Historic Motoring Extravaganza that attracts up to 800 vehicles and, along with the mass cycling Tour of Lauder, is the main local event.

There is a large network of circular walks and footpaths that radiate out from the village and may have potential for additional promotion to less committed walkers looking to enjoy pleasant countryside and fresh air.

Overall, our impression of Lauder was of a rather sleepy but attractive place that may be on the cusp of change as a result of new housing in the town. There are a few speciality shops and a restaurant that we understand are fairly recent additions to the town. Further housing development may encourage more new businesses to open up. In the meantime, Lauder may remain a place that most people pass through rather than stop at.

Visitors to Lauder who come by bus arrive at bus stances on the main street. The southbound stance is at a parking area and has good finger signage to the town's facilities. There are two public notice boards at this stance. One is badly damaged and the other displays a map showing the location of local wind farm developments for some reason. This stance is also next to a closed hotel that is currently up for sale. Some simple refurbishment work would help to make this bus stance a more welcoming first stop for visitors to Lauder.

The town has an hourly direct service to and from Edinburgh. The last bus arrives from the city just before midnight and the journey time varies between roughly an hour and an hour and a half. There are also three buses a day to and from Galashiels on schooldays, which somehow can take over an hour to complete their journey. The Border Railway is very unlikely to offer a viable alternative to the existing direct buses between Edinburgh and Lauder, although the road over Lauder Hill to the station 5 miles away at Stow offers spectacular views and is a favourite with dog walkers and "Sunday motorists". Lauder may be a good day out destination for cyclists and walkers heading south and alighting at the first railway station in Scottish Borders,

9.12. Loanhead

Loanhead stands a little separate from the collection of small towns that lies to the south of the Edinburgh city bypass. It has a clear town centre with some interesting public art, but little to attract or retain visitors in terms of speciality shopping or distinctive eating offers. The town

centre is somewhat overshadowed by the nearby Straiton Retail Park, which has probably captured most of the local and visitor retail trade.

There may be opportunities to develop new facilities in Loanhead that could complement those at Straiton Retail Park and extend length of visitor stay in the immediate area. In particular, there may be potential to develop soft activity facilities for children and families. However, it is questionable if such facilities would simply compete with and displace business from existing facilities of this nature in other parts of Midlothian.

Accommodation in Loanhead is limited to one boutique guest house that trades on its proximity to Edinburgh. The town hosts an annual 3-day music festival in local venues and the annual children's gala day claims to be the oldest and largest in Midlothian.

Loanhead is the closest town to the Midlothian Snowsports Centre and Pentlands Regional Park, which are major and iconic outdoor facilities in the area. However, we question how many visitors to them travel into the centre of Loanhead. Both facilities are also some distance from the Borders Railway and unlikely to derive much additional business from it.

A fairly recent addition to the town is Stewart Brewing, an award winning craft brewery that operates pre-booked and open visitor tours on set days of the week and is planning a first Beer & Food Festival. This is an innovative business with an expanding reputation and a growing profile in the pubs and other outlets it supplies. It is one to watch.

Loanhead has direct bus services to and from Edinburgh that run roughly every fifteen minutes. Given the town's distance from the nearest station on the Borders railway, the new rail services are unlikely to have much impact on travel to Loanhead,

9.13. Mayfield & Easthouses

Mayfield and Easthouses are essentially housing estates on the outskirts of Dalkeith. They are well designed housing estates laid out with plenty of green spaces and the higher parts of Mayfield offer panoramic views across Midlothian. However from a visitor's perspective, they offer few obvious facilities.

The notable exceptions are the indoor trampoline centre and bike centre at Mayfield Industrial Estate, both of which opened recently and are proving very popular with children and teenagers.

These facilities are state of the art inside but are housed in nondescript warehouses on a rather run down looking industrial estate. They have very limited directional signage to them and are accessed along a rutted road that has rusting containers and skips along one side. Their rather “grungy” surroundings may add to their appeal to young people.

These facilities highlight the potential to convert unused industrial premises for new leisure uses and demonstrate that visitors will travel to unusual destinations they may not have previously considered if they offer some form of unique and high quality experience.

In terms of public transport, there are buses from Edinburgh city centre to Easthouses and Mayfield every 15 minutes during the day with a journey time of 45 - 50 minutes. These buses continue on to Newtongrange and the National Mining Museum, a further journey of less than 10 minutes.

Given that Newtongrange station will have a rail journey time of 21 minutes from Edinburgh Waverley, there should be scope to promote it as a quicker public transport option to the Mayfield facilities. There may be potential for joint ticketing and promotion between the Mining Museum and the Mayfield facilities to offer a day out package of different activities and experiences for visitors from Edinburgh and elsewhere.

9.14. Melrose

Melrose is one of the most visually attractive small towns in Scotland and has an extensive range of facilities for visitors. In some ways it is a model of what a small “tourist town” should be.

A major iconic attraction – Melrose Abbey – is complemented by attractive local environments, other smaller scale attractions, good quality walking and cycling routes, a varied events programme, excellent speciality shopping and a wide choice of eating places with charm and character.

In addition, unlike some larger towns in the region, Melrose has a significant stock of hotel rooms as well as a good choice of accommodation in all other sectors (except, inevitably, hostels).

Given its proximity to both Galashiels and Tweedbank, the iconic status of Melrose Abbey and its established reputation as a visitor destination, Melrose may be the town best placed to benefit most from additional visitors that the railway will attract into Scottish Borders.

Onward travel from railway stations will be essential to maximise the benefits that the trains bring to Melrose. It should not be assumed that the majority of visitors will be happy to walk along the footpaths that link the town to Tweedbank. In the words of one of our stakeholder consultees, “if visitors can’t see something, they will not walk to it”.

At present a variety of different bus services link Melrose to Galashiels and Tweedbank. Not all of these services run from both towns. For example, the hourly No 72 Bannerfield – Melrose service runs through Tweedbank but does not go into Galashiels town centre. The hourly No 67 service from Galashiels to Berwick runs through Melrose but does not go through Tweedbank.

Careful thought has to be given to how the timetables of the different bus services to Melrose can best integrate with train times and how passengers can be informed if Galashiels or Tweedbank is their best option for the quickest onward bus travel.

The proximity of Melrose to Tweedbank could offer potential for more imaginative forms of onward travel such as horse drawn carriages, vintage vehicles, segways and electric bikes. It is perhaps up to the private sector to exploit any such opportunities to offer added value, premium price travel from Tweedbank to Melrose.

Given its range of serviced accommodation stock, perhaps the greatest challenge for Melrose will lie in attracting overnight visitors through the railway rather than just day visitors. Evening events may be one way of doing this, as could be visit, dine and stay packages. Collaboration between businesses in the town will be key to developing and marketing attractive product offers for overnight visitors.

9.15. Newcastleton

Newcastleton has been included in the Scottish Borders audit because it has a 7Stanes centre that links to similar facilities in the Tweed Valley.

It is an attractive and friendly village with an active local community and a surprising range of visitor facilities for somewhere so small. In particular, the Rock UK multi activity adventure

centre at Whithaugh Park is the type of facility for groups that it would be good to see replicated elsewhere in Scotland.

However, despite its many appealing features, we consider it unlikely that the Borders Railway will have any significant impact on visitor numbers to Newcastleton. It is much closer to the main west coast line at Carlisle from where there are five bus services a day, Monday to Friday.

There may be some limited scope for visitors to travel by bus through Newcastleton between the different railheads at Carlisle and Galashiels. However, in practice, most are likely to use the more direct, more regular and quicker No 95 services that run along the main A7 trunk road.

9.16. Newtongrange

Newtongrange is the location in Midlothian most likely to benefit in terms of visitor numbers from the opening of the Borders Railway. This is primarily because it is the site of the National Mining Museum Scotland (NMMS), one of the most iconic visitor attractions in Midlothian.

The railway will more than half the journey time of the existing, regular bus services from Edinburgh city centre and the station will be located within easy walking distance of the National Museum and a footpath providing direct access is planned. The railway should be the catalyst for attracting new visitor markets to the museum, presenting one of the prime opportunities for integrated travel and admission ticketing.

Although we understand the NMMS attracts more visitors to Newtongrange, more interpretation and promotion of the industrial heritage story, the heritage trail and other routes could spread more visitors around it.

If the new railway is to realise its full visitor potential, it will be important to develop Newtongrange as a railhead to visitor facilities in other adjoining communities. We are particularly thinking about the iconic Rosslyn Chapel and the indoor activity centres at Mayfield Industrial Estate – the latter are linked to the Mining Museum by regular bus services that have a journey time of less than 10 minutes, but Roslin takes around an hour.

We note that the NMMS and Rosslyn Chapel were the first two visitor attractions in the Lothians to join the VisitScotland Cyclists Welcome Scheme. However, there appears to be no dedicated cycle (or walking) route between them. This is a gap in provision that could be addressed by

using some of the quiet back roads between them, particularly if bike hire facilities are available at or near Newtongrange Station. The suitability of the Abellio “Bike and Go” bikes for journeys of this length is questionable.

We suggest there could be potential to package the museum and the chapel together as a full day heritage experience, and both would benefit from the “hop-on, hop-off” bus that is under discussion. At present, there are no direct scheduled bus links between Newtongrange and Roslin. This may present opportunities for more imaginative public transport links between the two, such as vintage buses or taxis, converted coal lorries, horse drawn carriages etc. Such services would make the onward journey a highlight of the overall experience and costs could be incorporated into an integrated ticket offer. However, some form of initial subvention may be needed to prove their business viability.

9.17. Newtown St Boswells

Newtown St Boswells is a pleasant village with a limited range of facilities that is somewhat dominated by the administrative headquarters of Scottish Borders Council. There are a limited number of eating and retail outlets in the village and most people travel to Melrose or St Boswells for evening entertainment and animation. However, the local community have published a leaflet of local walks that run to points of interest at the nearby River Tweed

There are four facilities that may have some potential for development of visitor markets.

Milestone Garden Centre is already well established with locals and has actively expanded its product range to include pet & wildlife and home & lifestyle products, as well as a restaurant and coffee shop. There may be scope for it to develop product offers more directly aimed at visitor markets. We note the success of the Teviot Smokey and Water Garden near Kelso, which is the second most visited attraction in Scottish Borders.

The regular livestock marts held in the village offer a distinctive flavour of rural life that may fascinate visitors from urban areas. However, the marts are primarily places of commerce rather than visitor attractions.

The Scottish Borders Donkey Sanctuary is a registered charity and labour of love that offers guided tours at weekends for most of the year. It has much to interest family groups but may

lack the capacity to extend its visitor facilities. More visitors may also cause frictions with its primary function as an animal sanctuary.

Tweed Horizons Business & Conference Centre is a low key meetings facility that calls for greater promotion. It is difficult to find information about it online and particularly difficult to identify what precise facilities it offers for meetings and conferences. Our impression is that it is primarily a base for businesses working in the sustainable technology sector rather than a fully fledged meetings or conference facility.

Newtown St Boswells has a direct hourly bus service to and from Edinburgh with a journey time of 1 hour 40 minutes. It also has an hourly service from Galashiels that takes 25 minutes and links it to Tweedbank, Melrose and St Boswells. The new rail services may reduce journey times from Edinburgh to the village if onward bus services integrate closely with train arrival times. However, it is difficult to see what would draw leisure visitors to Newton St Boswells in preference to its near neighbours of Melrose and St Boswells.

9.18. Pathhead

Pathhead is a well kept and attractive village located on the main A68 trunk road, approximately 12 miles from Edinburgh city centre. Due to its location, it suffers from being somewhere that people primarily pass through rather than stop at. From the north, the village is approached over a 19th century 5-arch stone bridge designed by Thomas Telford, which is now Category-A listed.

Pathhead is connected to Edinburgh and Dalkeith by bus services that run to Kelso and Jedburgh. There are up to 13 buses a day to and from Edinburgh. Journey time is approximately 50 minutes. These bus services run through Dalkeith town centre and anyone arriving at Eskbank station is likely to require a connecting bus into the town centre to link up with the bus to Pathhead.

Pathhead is approximately 4 miles from Gorebridge Station and 6 miles from Newtongrange Station. Currently, there are no direct bus services from either of these stations to Pathhead.

Most of the main visitor facilities, such as Vogrie Country Park and Crichton Castle, are located outside the village, some distance off the A68 with no public transport links.

It is likely to be difficult to overcome Pathhead's position as a through rather than an end destination. The seasonal operation and restricted opening hours of the nearby heritage attractions, which are one of the main reasons to visit the village, mitigate against any large scale growth in year-round visitors. The direct bus services from Edinburgh will continue to provide a quicker and easier public transport option to Pathhead than the railway and connecting buses.

As previously mentioned elsewhere, there may be some scope to introduce a seasonal minibus service from Gorebridge station that follows a circular route taking in Vogrie Country Park, Pathhead and Crichton Castle. This would provide direct public transport access to facilities from the station and could be used to promote a days out itinerary that includes time in Pathhead

Pathhead appears to be a very active community with a large number of artistic residents. Development of artistic events programmes, such as folk music festivals, may be the most cost effective way of increasing visitor numbers by creating additional reasons to visit.

9.19. Peebles

Peebles is one of the few destinations in Scottish Borders that is not accessed from Edinburgh by either the A7 or A68 trunk roads. It is an attractive, prosperous looking town that appears to house a significant number of residents who commute into Edinburgh for work on a daily basis.

Peebles probably has the widest range of visitor facilities of all the towns and villages included in this audit. It is the only town to have a number of large resort style hotels catering for both leisure and business markets and holds a significant proportion of the overall hotel stock in Scottish Borders

There is a sizeable guest house/B&B sector; a wide choice of self catering properties – many of them owned by people not resident in the town and booked through UK-wide letting agencies; a choice of caravan and camping facilities; and, glory be, the only bunkhouse accommodation identified in this audit.

The town centre has a distinctive and welcoming vibrancy with an extensive range of art galleries/studios and speciality shops. The eating out offer is impressive and includes the only restaurant in Scottish Borders or Midlothian to hold 3 AA rosettes. There is an active local

theatre and arts centre; significant parks and gardens nearby; and a large and varied events programme.

The range of facilities for outdoor activities is especially impressive, particularly at Glentress, which is probably the UK's leading mountain biking centre and attracts over 300,000 visitors p/a – double any other visitor facility in the region. There has been a recent investment of over £8 million in enhanced visitor facilities at Glentress, which should help to retain its market leading position. It is particularly successful at catering for less experienced mountain bikers, who are generally viewed as offering the greatest potential for market growth.

The facilities at Glentress, including the Go Ape Adventure Park, and the mix of activities and experiences available at Kailzie make Peebles a very family friendly destination. The only type of visitor facility that the town possibly lacks is an iconic built heritage attraction, although there are many historic buildings in and around the town, some of which have been converted into visitor accommodation. It could also be argued that the Great Polish Map of Scotland at nearby Eddleston is the only built heritage facility of its type in Scotland.

Peebles is a welcoming place that will provide just about anything a visitor may want. On our mystery visitors, we were struck by the friendliness and enthusiasm of staff in shops and cafes who proactively engaged with visitors. One shopkeeper to whom we spoke acknowledged that, while there is a good visitor information centre in the town, everyone has a role to play in welcoming and helping visitors. (We also had a rather bizarre experience where one facility tried to discourage our interest in one of their products on the grounds that it was “awfy expensive”).

In terms of public transport, Peebles is primarily served by the X62 service, which runs up to every 20 minutes from 0730 to 2330. Journey time is normally around an hour and ten minutes and buses continue on to Galashiels, giving a direct connection to the Borders Railway. The Peebles – Galashiels leg of the journey takes around 45 minutes.

Buses arrive at a stance in the High Street, which is next to a taxi ranks for any onward journeys. The bus stance itself is in good condition, but the immediate area around it could maybe benefit from a little sprucing up and the addition of a bit of colour through plantings.

Given journey times on bus and train, the bus service is likely to remain the public transport option of choice for most people travelling to Peebles from Edinburgh. However, there may be scope to develop integrated ticketing packages for rail enthusiasts that enable them to travel to Galashiels by train and then travel by bus to spend time in and around Peebles and then return

to Edinburgh by bus from the town. This would create a day out loop taking in a number of locations and different modes of transport.

9.20. Penicuik

Penicuik is the largest town in Midlothian. It is located on the A701 road from Edinburgh and is currently connected to the city centre by a number of direct bus services that operate every 15 minutes during the day. Journey time is generally just under 1 hour.

Penicuik lies approximately 8 miles from Eskbank Railway Station. There is a direct bus service from Eskbank to Penicuik that runs half hourly during the day. Journey time from Eskbank Railway Station to Penicuik will be approximately 36 minutes.

The town centre of Penicuik is fairly nondescript. There is little sense of arrival or welcome at the main bus stance, which is next to two discount supermarket chain stores. The main central shopping area has been pedestrianised and primarily caters for local resident rather than visitor needs, although there are one or two independent shops that may appeal to visitors with specific interests. There are a number of empty retail premises in the town centre.

The town centre has a reasonable choice of eating and drinking places which, again, appear to cater primarily for resident rather than visitor markets. There are also a number of restaurants and bars in more rural areas outside the town. There is limited visitor accommodation stock within the town itself, but a slightly wider choice of small scale serviced and non-serviced accommodation in the surrounding rural areas.

At present, there are no obvious iconic visitor facilities in Penicuik that are likely to attract significant numbers of visitors to the town in their own right. The volunteer-run Arts Centre is not particularly visible from the main arrival points in the town centre, but is a lively facility with interesting and varied programmes of exhibitions, concerts and activities. It should enhance any visit to the town and may attract visitors to specific events.

The renovation and consolidation works currently underway at Penicuik House and its grounds on the outskirts of the town have long term objectives to provide greater public access to landscaped areas. This project may attract some additional visitors to the town.

Proposals to develop a paper making heritage centre in the old Bank Mill are less progressed. Any such facility may offer potential to align with other industrial heritage facilities in the area, such as the National Mining Museum Scotland. However, on its own, it may be of interest to specialist audiences only.

The ruins of the pre-reformation St Mungos Parish Church are prominent from the main town centre car parks but currently offer no visitor access or interpretation. There may be some scope to tell an interesting story at the ruins if safe public access can be secured.

Overall, the town centre of Penicuik has a somewhat dated and tired feel that is unlikely to attract and retain significant numbers of visitors. There is a sense that the main retail activity now takes place at out-of-town locations and, although there is a considerable restaurant and a cafe offer, it is unlikely to attract many visitors to the town in its own right. The new local Business Improvement District initiative may have a role to play in freshening up the appearance of the town centre.

The Pentlands Science Park to the north of the town may offer potential to attract research conferences and seminars. At present, Penicuik has no facilities of adequate size to accommodate anything other than the smallest meetings. The Science Park itself has meeting rooms but, again, these are limited in capacity and have no adjoining delegate accommodation.

One strength of Penicuik that is perhaps currently under played is its proximity to attractive rural countryside. The further development and/or promotion of walking, cycling and horse riding routes may encourage more visitors to use the town as a stepping stone to the countryside.

Given the current excellent provision of regular bus services to and from Edinburgh city centre and its distance from the nearest stations on the Borders Railway, it is questionable how much impact the opening of the new railway will have on visitor numbers to Penicuik. If the railway can serve as an access route to iconic Rosslyn Chapel there may be some scope to draw visitors from the chapel into Penicuik. However, at present, it is difficult to identify compelling reasons for them to travel the few extra miles beyond Roslin to the town.

9.21. Roslin & Rosewell

Roslin & Rosewell are smaller, picturesque, more rural villages that are distinct from the urban conurbation on the south of the Edinburgh city by-pass. They attract a large number of visitors

through Rosslyn Chapel, an iconic heritage building of international renown, which is the most popular built visitor attraction in Midlothian and an active collaborator in local tourism.

A limited infrastructure of visitor accommodation and ancillary facilities like shops and eating places has developed largely on the back of visitor numbers to the chapel. However, most visitors to the chapel spend limited time elsewhere in the villages. There may be scope to extend visitor stay by linking the chapel more with the outdoor facilities at the scenic country park and wildlife reserve at Roslin Glen.

There is an internationally recognised cluster of life sciences facilities on the outskirts of Roslin that houses world leaders in their field. There may be scope to develop academic/scientific conferences and seminars around this cluster, particularly given its proximity to a complementary mass of research centres and businesses at Pentlands Science Park. New meeting facilities and quality accommodation will be needed to realise this opportunity.

In our view, the area around Roslin offers the greatest potential in Midlothian for the development of a large scale hotel development catering for both business tourism markets, drawn by the cluster of academic and research facilities, and leisure markets, attracted by the international profile of Rosslyn Chapel.

Roslin is currently served by the No15 bus service from Edinburgh city centre that runs every 30 minutes during the day and has a journey time of around 50 minutes. This service continues to Penicuik, a further journey of 13 minutes. It is also served by the No40 service from Eskbank that runs to a journey time of around 22 minutes every half hour during the day.

Rosewell, an attractive village of miners' cottages which hosts regular auction sales, is served by the No49 service from Edinburgh city centre, which run every 15 minutes during the day and has a journey time of just over an hour.

There may be some scope to promote Eskbank as a rail access to Rosslyn Chapel, if train and bus timetables integrate. However, we suggest there may be greater potential in developing new public transport and cycling links between Newtongrange station and Roslin in order to package Rosslyn Chapel and the National Mining Museum Scotland as the anchor components of a full day out from Edinburgh.

9.22. Selkirk

At first sight, the centre of Selkirk feels smaller and more compact than those of the other major towns in Scottish Borders. This is largely due to the layout of the main A7 road through the town. However, Selkirk has a strong mix of different types of good quality accommodation, although much of it is in more rural areas outside the town itself.

The town centre has a number of relatively small scale heritage attractions, a helpful visitor information centre and a reasonable selection of speciality shops and eating places. We are aware that Scottish Borders Council is planning an investment of £2.75m to refurbish the Sir Walter Scott courthouse in the town centre. There is a further cluster of attractive places of interest around the 5 star Lochcarron Tartan Visitor Centre, which is a short distance out of the town centre.

Perhaps the main visitor appeal of Selkirk may lie in its first class range of outdoor facilities for cyclists, golfers, horse riders and walkers. Less committed, first time visitors in particular will also find a good mix of imaginative and varied “softer” outdoor facilities at the Bowhill and Philiphaugh estates as well as two wildlife reserves and short walks at The Haining Estate adjacent to the town centre, which also has facilities for corporate functions.

Given its proximity to Galashiels, there may be potential to promote Selkirk as a final destination of choice for visitors using the Borders Railway to get out of the city to enjoy the best of what the Scottish countryside has to offer without working up too much of a sweat.

At present, Selkirk is served by the X95 Edinburgh – Carlisle bus service that runs every half hour during the day and takes just over two hours from Edinburgh to Selkirk. Integration of rail and bus timetables should offer significant potential to reduce this journey time via the railway.

Buses arrive in the surprisingly busy, central Market Square where there are directional finger posts, an information board and modern and freshly painted, free admission public toilets. The visitor information centre is only a few yards away and many of the local amenities are within easy walking distance.

Given that Bowhill and Philiphaugh are a little outside the town, there may be scope to develop a dedicated visitor bus service to them from Galashiels station that could also serve as a service to the town centre.

Indeed, we would suggest there is potential to operate a circular hop on/hop service from Galashiels covering Selkirk, Philiphaugh and Bowhill and continuing on to St Boswells and

Dryburgh, before returning to Galashiels via Melrose and Abbotsford. In our view, this route is likely to be the most viable for a regular hop on/hop off bus service, although some form of subvention will probably be needed to pilot it and prove its business case.

9.23. Shawfair & Danderhall

Shawfair & Danderhall are the communities in Midlothian closest to Edinburgh and differ from other parts of the area in that they lie to the north of Edinburgh city bypass.

Danderhall is a tidy community, but is primarily a housing estate with minimal visitor interest. Shawfair is a work in progress, which will be the site of a £200 million development to build a new community of 4,000 houses with ancillary facilities, the largest new urban development programme in Scotland.

At present Shawfair is a growing business park, a couple of family friendly bar/restaurants and a lot of new roads and preparation works. Its station on the Borders Railway is likely to be used by commuters rather than visitors, although there may be some scope to generate visitor use if proposals to develop foot and cycle path links from it to Dalkeith Country Park are realised, and if new resident facilities include anything of potential visitor interest such as hotels or additional restaurants to service the business park.

9.24. St Boswells

St Boswells is a relatively small, but particularly attractive and well maintained village that mostly lies slightly off the main A68 trunk road. Its main attraction, the historic ruined Dryburgh Abbey on the banks of the River Tweed, is located some way out of the village by road and currently has no public transport links. However, pleasant and largely level riverside footpaths bring it within relatively easy reach for walkers of all levels.

The nearby, but more distant Scott's View offers one of the most spectacular and iconic panoramas of the Scottish Borders but, again, is not accessible by public transport. Getting there by foot involves rather more strenuous exercise but nothing beyond the capabilities of any regular walker or rambler.

The village has two popular and highly regarded hotels, one on the A68 and a larger, more secluded one next to Dryburgh Abbey, which hosts a good number of weddings and similar functions. A relatively recent addition to the village centre is the exemplar Main Street Trading Company, an imaginative outlet combining a good quality café, a well stocked bookshop, a speciality food outlet and homewares. This is a major asset to the village that is developing into a visitor destination in its own right.

There are a couple of other, smaller scale speciality shops on the main street and a small selection of guest house/B&B and self catering accommodation in and around the village.

St Boswells is a relaxing place where visitors could easily spend a full day walking out to the nearby attractions, enjoying lunch, browsing the speciality shops and stretching out beside the river.

Buses arrive at an attractive bus stance close to the village green at the start of the main street. There are tidy and well maintained free admission public toilets at this stance

St Boswells is served by hourly direct buses from Edinburgh that take about 1 hour 45 minutes to make the journey and continue on to Jedburgh or Kelso. Passengers to one or the other end destinations change at St Boswells for the final part of their onward journey.

The village is also served by hourly services from Galashiels to either Jedburgh or Kelso, the journey from Galashiels taking 25 minutes.

The Borders Railway may offer some potential to reduce journey times from Edinburgh if train and bus timetables integrate and the train should provide a viable alternative travel option for visitors from the city.

As we previously outlined, we believe a circular route covering Galashiels – Selkirk – St Boswells – Melrose – Galashiels offers the best opportunity to introduce a circular hop on/hop off visitor bus service from Galashiels station. It would be preferable if this service could also include Dryburgh in order to provide a much needed public transport link to the abbey, but it is recognised that the backroads required may be unsuitable for a 50-seater coach.

9.25. Stow

Stow is a small village sitting on the A7 that will have one of the three railway stations in Scottish Borders. Like Pathhead and Earlston, it is primarily a through rather than an end destination.

Visitor facilities are currently limited to a few self catering properties, a café/gallery, a tea room and a couple of walking routes, one of which is a geocache trail. There are a few small craft workshops in and around the village, one of which is developing pottery classes. New housing is currently being built in Stow and we understand there are early-stage proposals to develop additional self catering accommodation and possibly some form of vintage vehicle transfer service from the station.

Stow is also on the Borders Loop on-road cycle route and it has been suggested that it may be a good start point for any cyclists coming out from Edinburgh on the train to begin exploring Scottish Borders on two wheels. We have heard of plans for a cycle hire/repair business to be based in the former railway station and such a facility would be critical to attract cyclists of any ability.

At present, the village is served by the No95 bus service that runs from Edinburgh city centre every half hour and takes 1 hour 10 minutes to get to Stow on its way to its final destination of Carlisle. The new rail service will also run every half hour and will reach Stow 42 minutes after leaving Edinburgh. This will represent a significant time saving.

As things stand, Stow has little to entice visitors to get off at its station rather than others along the route. It may be able to attract some walkers and cyclists, although an enhanced network of footpaths and cycleways may be needed to realise this opportunity. It could serve as a railhead for Lauder, 5 miles away, although there are currently no bus services between the two and Lauder has a limited range of visitors facilities compared to other options. Lauder may also be simpler for visitors to reach using the existing direct bus service from Edinburgh.

We believe there is an active local community in Stow. The railway may present an opportunity for the community to collectively consider what more it could offer visitors.

9.26. Straiton

Straiton is effectively a large retail centre on the edge of Loanhead next to the Edinburgh city bypass. It has developed around Scotland's first IKEA store and now includes numerous well

known chain outlets and three “High Street” coffee shops/eateries. As the largest and busiest retail centre in Midlothian, it draws visitors from a wide area. However, it would be interesting to know how many of these visitors are aware they are in Midlothian rather than Edinburgh.

The centre does attempt to encourage visitors to move on to other parts of Midlothian. For example, its website includes details of restaurants and bars in neighbouring Loanhead. Unfortunately these details serve to highlight the weaknesses of Loanhead’s product offer in this sector.

Straiton is almost certainly the busiest visitor destination in Midlothian, but it is questionable how many of its visitors move out from the retail park to other facilities in the area. Retaining and dispersing more of its visitors should be a top priority for tourism in Midlothian. Straiton brings a very large number of people to the doorsteps of many Midlothian tourism businesses. These businesses need to work in partnership with each other and with the retail centre to make more of this opportunity.

There are also currently plans to build Scotland’s first dedicated film studio complex at Straiton. The plans for this two phase project include proposals to develop a 180 room hotel “to service the complex”. Such a development may provide the large scale serviced accommodation facility that Midlothian currently lacks, assuming that the film complex does not take up all of its capacity. However, proposals for the film studio are still at an early stage and no work has begun on site.

Straiton is linked to Edinburgh by a number of very regular bus services, including those that serve a park and ride facility for the city centre. It is the furthest western edge of the urban conurbation of north Midlothian and only the most committed train enthusiast is likely to ever consider using the Borders Railway to get to it from Edinburgh.

9.27. Tweedbank

Last but not least, Tweedbank is the final terminus of the new railway in Scottish Borders. It is primarily a pleasant but unremarkable residential housing development with an adjacent industrial estate and a small number of visitor facilities, in particular the highly regarded and ambitious Herges on the Loch bistro/bar and the landscaped park areas and footpaths around the man made Gunknowe Loch.

Major new developments are planned in Tweedbank to support the new railway terminus. The £5million Central Borders Business Park will be built next to the station, which will also house the Great Tapestry of Scotland, the world's largest embroidered tapestry, in a specially constructed building – an investment by Scottish Borders Council of £3.5m. We understand that the tapestry will initially be housed in a temporary building until its new permanent home is built.

It would be factually accurate, but possibly not politically correct, to say that a number of stakeholder consultees expressed strong doubts about the extent to which the tapestry will act as a visitor draw in its own right, although they generally acknowledge that it is likely to enhance the overall visitor experience at what otherwise could be a fairly nondescript rail terminus from a visitor's perspective..

While Tweedbank itself may have limited visitor facilities, it is the closest station to what are perceived to be two of the main draws that are likely to attract visitors on to the railway. The first of these is the neighbouring town of Melrose with its iconic ruined abbey and extensive range of quality visitor facilities, which we have discussed previously.

The second is Abbotsford, the home of Sir Walter Scott, which has recently undergone a major development programme to create a new visitor centre and other enhanced facilities. It is anticipated that Abbotsford will be the primary focus of many day visitor trips to Scottish Borders on the railway due to both its heritage product offer and its convenient location close to the new line.

While some passengers may be happy to walk the comparatively short distances from Tweedbank station to Melrose and Abbotsford, the majority may not and will require and expect onward transportation. There are regular service buses from Tweedbank to Melrose with a journey time of less than 10 minutes. However, there are actually more bus services from Galashiels to Melrose.

Abbotsford at present has no public transport service. The nearest services leave visitors a 10 minute walk from the visitor centre. Fine for most people on a warm sunny day, but weather can never be guaranteed in Scotland.

Given this situation, we suggest there are opportunities to offer rail visitors a range of different onward transport options from Tweedbank to Melrose and Abbotsford at a variety of different price options. These could range from simple minibus and taxi services to premium priced

transfers by horse drawn carriages, vintage cars or Harley Davidson motorbikes as well as self-drive options like electric bikes or scooters.

We suggest that the private sector should take the lead in providing onward transfer options from Tweedbank station with scope for some initial subvention funding for those options that require the greatest initial set up capital, but offer most significant opportunities for return on investment and enhancing the visitor experience.

10. WHERE WE ARE NOW or THE CURRENT POSITION - SUMMARY

Analysis of available research shows that the Borders Railway is opening in a challenging market environment for tourism. The overall trends in performance of Scottish tourism do not present the rosy picture that we are perhaps led to believe from sound bites.

The train, although primarily a commuter service, provides a welcome opportunity to increase the volume and value of tourism in both Midlothian and Scottish Borders. There is already some evidence of new investment – it is surely no coincidence that the Dalkeith Country Park development will be completed in the same month that the train service commences.

VisitScotland and partners are committing additional public sector marketing spend of upwards of £350,000 over three years to support the opening of the railway. This can be expected to generate a healthy return on investment. (For every £1 VisitScotland invests in marketing, there is a £20 return for the Scottish economy). The media coverage that will result from the opening of the longest new railway line in Scotland for 100 years should generate significant attention and interest.

However, are business in Midlothian and Scottish Borders ready to exploit this opportunity and convert enhanced awareness into additional visitor spend?

A key finding of the stakeholder consultations and the online business survey is that a majority of businesses in Midlothian and Scottish Borders express a desire for more information about practical elements of the railway – timetables, capacity for bikes, information provision on board and at stations etc. They also want information and guidance on the types of visitors the railway is expected to generate and the marketing campaigns that will target them.

It is interesting that over 80% of respondents to the online business survey believe the railway has potential to grow and enhance tourism in Midlothian and Scottish Borders. However, only 40% anticipate it could benefit their own business or organisation.

While a majority appear to view the railway as a good thing for local tourism in general, many seem reluctant to commit to investing time and money to developing new products and services until they are more convinced of the business development opportunities the railway can offer their own business.

This highlights the need for proactive collaboration between all agencies to provide the information that businesses want and outline the opportunities the railway will offer them. We appreciate that efforts have already been made to do this but, clearly, key messages are not getting through to businesses.

We also appreciate there have been difficulties in supplying detailed information to businesses before the new ScotRail franchise holder is in place. We understand Abellio plan proactive communications to businesses once their new Tourism Manager is in place at the beginning of June. This gives a three-month period to win the hearts and minds of local businesses.

In our view, it would be a major opportunity missed if the railway was to open with a large proportion of local tourism operators unready or unprepared to engage fully with it. As both stakeholders and survey respondents commented, “we have one chance to get this right”.

We would endorse the need for the proposed Borders Railway Business Opportunities Programme, which may need to be backed up with on-train familiarisation trips for operators, and possibly Innovation or Marketing themed workshops, webinars, conferences or seminars to capitalise on the strengths and gaps identified below, supported by an active engagement process to ensure this activity reaches the businesses most in need.

The main purpose of this audit is to highlight existing strengths and gaps in the supply of tourism products and services in order to identify –

- Opportunities to build and capitalise on existing strengths.
- Areas where there is an existing base of products and services that could be developed further to become additional strengths.
- Areas where new products and services may be needed to realise the business opportunities of the railway.

In terms of existing and potential strengths that can be optimised to attract visitors to Midlothian and Scottish Borders through some form of alignment with the railway, we suggest those outlined in the table below are the key attractors to emphasise.

10.1 Product: Existing strengths in relation to the Borders Railway

EXISTING STRENGTHS	
Midlothian	Scottish Borders
Key magnet attractions close to the railway: Dalkeith Country Park; National Mining Museum Scotland; Rosslyn Chapel.	Key magnet attractions close to the railway: Abbotsford; Selkirk Country Estates; Melrose & Melrose Abbey; Tweed Valley Forest Park.
Activity facilities for the youth and family markets: Edinburgh Combat Centre; Midlothian Snowsports Centre; Pentland Hills Regional Park; Rize Edinburgh; Transgression Park	High quality outdoor activity facilities for both committed and less experienced markets: Angling; Cycling; Horse Riding; Mountain Biking; Walking
Heritage properties offering accommodation and/or small scale meeting facilities: Borthwick Castle; Dalhousie Castle; Melville	Strong and imaginative portfolio of cultural, sporting and tribal (i.e. appealing to special interest markets) events attracting large

Castle; Newbattle Abbey; Oxenfoord Castle	attendances from outwith the region.
Major retail facilities attracting visitors into the area: Dobbies/Melville Nurseries; Straiton Retail Park	Extensive range of independent retailers of discretionary leisure and lifestyle products and crafts and art galleries and studios. (Particularly in Kelso, Melrose & Peebles)
Proximity to and ease of access from Edinburgh: New train services; Existing scheduled bus services; Infrastructure of taxi and chauffeur services.	Landscape and environmental qualities & benefits - attractive, well maintained countryside offering rural peace, quiet and relaxation in which to recharge and revitalise

In addition to these existing strengths, there are a number of product areas that we suggest have potential to become additional strengths that can attract visitors through the railway if they are developed further. These are outlined below.

10.2 Product: Potential strengths in relation to the Borders Railway

POTENTIAL STRENGTHS	
Midlothian	Scottish Borders
Events: Large scale events attracted into the area especially at Dalkeith Country Park; Sporting and active events for less committed participants & spectators; Events linking into Edinburgh's existing portfolio of festivals; Smaller cultural events for niche audiences.	Food & Drink: Increase participation in independent accreditation schemes; Enhance promotion of local produce on menus; Develop higher profile food & drink events; Link food & drink more strongly to local culture.
Outdoor activities: Enhance footpaths, cycleways and bridle paths for less committed markets looking for "soft" exercise.	Built heritage: Additional joint marketing of heritage facilities; Extend opening periods of heritage facilities.
Built Heritage: Joint marketing of heritage	Townscapes: Additional interpretation and

properties offering accommodation and/or meeting facilities	promotion of the quality and heritage of the built environment in many towns and villages.
Food & Drink: Increase participation in independent accreditation schemes; Develop joint promotions between both fine dining operators and family friendly establishments; Support new food and drink related events.	Packaging: Combining heritage, activities and cultural products more explicitly to create day visit and short break packages for independent visitors and those booking through tour operators.
Local heritage: Dalkeith Heritage Quarter; Gorebridge industrial heritage interpretation; Newtongrange industrial heritage interpretation	Proximity to and ease of access from Edinburgh; New rail services reducing journey times; Existing scheduled bus services integrating with railway timetables.
Business Tourism: Drawing on academic and scientific strengths of life science clusters to develop markets for conferences & seminars.	Sense of place: Building on a clear sense of local identity and pride; Making historic local customs more visitor friendly.

There are also a number of areas where we suggest Midlothian and Scottish Borders have gaps in terms of tourism products and services. There are areas that will need to be addressed to realise the full potential of tourism in both areas.

10.3 Product and service gaps in relation to the Borders Railway

PRODUCT AND SERVICE GAPS	
Midlothian	Scottish Borders
Accommodation: No large scale serviced accommodation for business and leisure tourism groups; No large self catering holiday complexes; Limited caravan park provision; No hostel/bunkhouse accommodation.	Accommodation: No larger economy, branded hotel accommodation for groups & coach parties. No large self catering holiday complexes: Very limited hostel/bunkhouse accommodation.
Business Tourism: No dedicated and high quality meeting facilities capable of accommodating larger events of over 200 delegates.	Galashiels: Unexciting town centre with empty retail premises and no significant visitor attraction: Poor gateway introduction to the region. (Similar issue in Hawick with retail)

Culture: No dedicated indoor facilities for live indoor cultural events like theatre or music.	Tweedbank: Not currently a tourism destination. More a residential and business centre with little for visitors.
Speciality Shopping: Few Independent retailers of discretionary leisure and lifestyle products; Limited crafts and visual art studios and galleries.	Night Time Economy: Somewhat traditional and unimaginative; Few heritage or cultural facilities open; Limited evening animation for young professional markets.
Sense of place: Lack of a clear identity for local towns that may be viewed as suburbs of Edinburgh. Local facilities promoting Edinburgh as their location.	Activities: No distinctive indoor activity facilities for young people like those in Midlothian to provide wet weather alternatives to the strong outdoor provision.
Town centres: Unexciting town centres with little animation or vibrancy to attract and retain visitors.	

Overall, there are an encouraging number of existing and potential product and service strengths in both Midlothian and Scottish Borders. The Borders Railway will be able to capitalise on a strong existing tourism infrastructure in both areas and should offer potential to help develop certain products and services to the next level of visitor interest, primarily by acting as a catalyst for new and additional collaboration and partnership working.

The railway should also help to attract investment in new facilities where there are currently gaps in provision by acting as a means to deliver new markets and additional visitors that will make new facilities more viable.

11. BUSINESS & MARKET DEVELOPMENT OPPORTUNITIES

In this section we will build on our analysis of existing and potential tourism strengths and gaps in product and service provision in Midlothian and Scottish Borders to identify specific business and market development opportunities to grow business through alignment with the Borders Railway. A number of these opportunities would still be relevant even if the railway was not opening and relate to wider tourism development opportunities.

For simplicity, we have outlined specific opportunities as a series of summarised points. We would highlight the importance of collaboration in realising opportunities and the opportunities for partnership working across local authority areas and across different tourism sectors.

In terms of overall priorities, the Existing Tourism Strengths highlight facilities that are already well established and, with a little additional development and collaboration, could provide quick wins that are in place for the opening and the first autumn and winter season of the Borders Railway. These existing strengths will be key to delivering top quality visitor experiences from day one of the new railway.

The Potential Tourism Strengths are facilities and services that are likely to require a little more time, development support and collaboration to become key strengths and major motivators of visitors using the railway. They can perhaps be seen as medium term priorities that may need to be developed to sustain initial levels of visitor interest in the Borders Railway and provide new motivations for repeat visits.

The Product Gaps are facilities that are currently unavailable and are likely to take longer term planning to address – such as development of new accommodation - or areas where urgent action may be needed to address current weaknesses in the visitor experience – town centres with empty retail premises and a lack of animation; under developed speciality shopping in Midlothian and unimaginative night time economy in Scottish Borders.

In all cases, collaboration and partnership working will be essential to deliver enhancements to the visitor experience. Partnership and collaboration between public sector agencies, private sector business associations and individual businesses; between individual businesses in different sectors ; and between different communities to create stronger clusters of products and encourage visitor spread and retention throughout both areas.

Finally, we would highlight the opportunity raised by the 2016 national Year of Innovation, Architecture and Design which would seem to be a particularly good fit with Midlothian and the Scottish Borders and could be linked with the improved access. If previous practice is followed, it can be expected that a theme specific Growth Fund will be announced and a partnership programme for marketing and events.

11.1. Building on EXISTING Strengths	
<p>11.1.1 Key Magnet Attractions</p>	<p>Joint promotions with ScotRail, VisitScotland and other partners as the “Seven Wonders of the Borders Railway” that offer an exceptional introduction to the history, people, activities and countryside to which the railway provides fast access. (i.e. the places to feature on promotional displays at stations, on the sides of trains etc.).</p> <p>Joint promotions as a mix of cross-sector and cross-area experiences to emphasise the variety on offer through the railway and the different types of people to whom the railway can appeal. (i.e. progress from working with facilities in the same sector such as historic houses, country parks or cycle routes)</p> <p>Joint added value or discounted ticketing across all seven attractions as an exclusive benefit for short break overnight visitors staying in local accommodation. Develop different seasonal offers to stimulate demand at times of greatest spare capacity Possibly link this with a 2 – 3 day rail pass that is only available through accommodation providers.</p> <p>Cross reference and promote each other on individual websites (Bowhill Estate at Selkirk already reference Abbotsford on their website).</p> <p>Enhance transport links between attractions feeding off the railway e.g. regular buses from National Mining Museum Scotland to Rosslyn Chapel and from Abbotsford to Selkirk.</p> <p>Provide pick up and drop off bike hire facilities where visitors can hire a bike at one magnet attraction and leave it at another.</p> <p>Link each attraction to other nearby facilities to spread and disperse visitors out from them and retain them (and their spend) in the area longer i.e. Selkirk Country Estates to Sir Walter</p>

	<p>Scott's Courthouse and Lochcarron Tweed Visitor Centre; Rosslyn Chapel to Roslin Glen Country Park & Roslin Glen Wildlife Reserve; Tweed Valley Forest Park to Traquair House, Kailzie Gardens and Peebles speciality shopping. Possibly develop added value or discount schemes linked to the magnet attractions to encourage visitor dispersal.</p>
<p>11.1.2 Midlothian Youth Activity Facilities</p>	<p>Joint branded promotions to position Midlothian as an exciting destination for younger visitors and family groups and develop the profile of Midlothian. "Mad for Midlothian", "Mega Midlothian" etc.</p> <p>Joint ticketing initiatives with each other, ScotRail and the seven magnet attractions to encourage dispersal and longer length of stay.</p> <p>Proactively promote ease of access from the railway and onward transport links from the nearest railway station.</p> <p>Promote evening openings and develop ancillary evening elements – music, food, competitions – to attract evening visitors out from Edinburgh (especially family groups holidaying or short breaking in the city)</p> <p>Develop food and activity packages with onsite or other nearby facilities – "Bikes & Burgers", "Supper & Ski", "Tea and Trampolines" offers with family-friendly restaurants.</p>
<p>11.1.3 Scottish Borders Outdoor Activities</p>	<p>Develop and promote multi-activity taster days or weekends to attract new entrants to the activities. Develop integrated ticketing offers with ScotRail and promote through local accommodation providers to encourage overnight stays.</p> <p>Promote and expand availability of equipment hire for novice</p>

	<p>visitors – off-road bikes, fishing rods, walking boots, day packs, waterproofs etc.</p> <p>Promote and possibly enhance tuition for new entrants – guided walks, angling tuition, horse riding lessons etc.</p> <p>Promote small group, guided walks and bike tours from stations adopting special interest themes, e.g. Industrial heritage, poetry, landscape, village pubs, and peel towers.</p> <p>Promote activities and expert instruction to committed markets to attract younger, professional market segments to the region on short breaks and day visits.</p> <p>Joint promotions between operators offering different types of activities i.e. progress from “Cycling in the Borders” or “Horse Riding in the Borders” to a wider, multi-activity offer that appeals to novices or encourages experienced activists to sample a different activity.</p> <p>Extend operating hours of activity facilities to promote evening walks, cycles, rides etc. and link these to other sectors like food and drink or speciality shopping e.g. “Ride to Dinner” in a country restaurant; “Art Evening Cycling” – a guided or directed cycle route to an artist’s studio opening late to accommodate.</p>
<p>11.1.4 Midlothian Heritage Accommodation/Business Tourism Facilities</p>	<p>Joint marketing around a “Midlothian Meetings” (or similar) brand that highlights the unique heritage ambience of participating venues, their accessibility from Edinburgh and their tranquil and private surroundings.</p> <p>Develop heritage onward transportation from railway stations in association with chauffeur drive operators – vintage vehicles, horse drawn carriages etc.</p>

	<p>Develop exclusive behind-the-scenes access to magnet attractions as premium priced add on options for meeting delegates.</p>
<p>11.1.5 Scottish Borders Events</p>	<p>Develop integrated rail travel/onward transport/admission ticketing with ScotRail. This will be particularly crucial for larger events at the likes of Kelso.</p> <p>Undertake joint marketing of rail travel options to events to emphasise their ongoing availability.</p> <p>Cross referral and promotion of events, possibly with incentivised offers e.g. 20% off the admission cost of an October event if you attend another event in September.</p> <p>Proactive joint promotion of event spaces and facilities to external event organisers to bring new large, scale events into the region. “Scottish Borders Events Bureau”.</p> <p>Development and promotion of short break events packages in association with local accommodation providers.</p> <p>Development of a regional events diary that identifies opportunities to combine or partner different events to create 2 day packages or daytime/evening packages that encourage overnight stays in the region.</p>
<p>11.1.6 Retail</p>	<p>Additional promotion of other visitor facilities in the area at the main retail complexes in Midlothian. Perhaps linked to added value offers to retail customers or loyalty card holders at times of greatest spare capacity in other facilities. e.g. Wednesday evening dining offers to holders of the Asda loyalty card. 10% off activity centre admission when you spend £20 or more at Dobbies. Such promotions raise the profile and awareness of</p>

	<p>facilities and can generate indirect bookings without visitors necessarily redeeming offers.</p> <p>Take displays from other visitor facilities to the retail parks to provide animation at them and encourage additional visitor dispersal into the rest of Midlothian Stunt bike riding displays at Ikea, hot air balloon rides at Dobbies etc.</p> <p>Joint promotion of speciality shopping in Kelso, Melrose and Peebles, possibly also incorporating Innerleithen and St Boswells. “Scottish Borders for the Independently Minded” – linking the different towns to create a greater critical mass of products and position them on a par with book towns, food towns or whatever. Progress from each town promoting only its own independent traders. Possibly create an Independents Trail linking the towns or a Shoppers Special bus service linking them all to Galashiels station.</p> <p>Promote speciality shopping evening events to draw evening visitors out from Edinburgh. Combine with animation in each town centre to create a regular programme of such events. Tuesday is Peebles’ late night opening for speciality shopping, Wednesday is Melrose’s late night opening etc. Link with food and drink offers in local eateries or late night opening of visitor attractions and activity facilities.</p> <p>Highlight individual retailers, artists and craftworkers to create a more personalised and human connection to Scottish Borders. Focus particularly on younger, edgier artists and retailers to position Scottish Borders as a destination for younger, professional visitors.</p>
<p>11.1.7 Midlothian: Ease of Access from Edinburgh</p>	<p>Individual facilities promote short rail journey times and the regularity of rail services on their own promotional materials.</p>

	<p>Facilitate easy onward travel from railway stations by integrating scheduled bus services and providing taxi ranks at stations. Promote specific indicative examples of integration.</p> <p>Pilot new visitor bus services linking Newtongrange station and National Mining Museum Scotland to Rosslyn Chapel (and possibly Roslin Country Park) and Gorebridge station to Vogrie Country Park, Pathhead and Crichton Castle. These may operate seasonally only during their pilot phase in order to measure demand.</p> <p>Develop and promote bike hire facilities at all stations in the area. Promote safe cycle routes from each station to key local facilities.</p> <p>Joint “Another Side of Scotland” (or similar) promotion highlighting different village and rural experiences within a 30 minute rail journey of Edinburgh city centre.</p>
<p>11.1.8 Scottish Borders: Quality of Environment.</p>	<p>Promotion of a small number of iconic landscapes and built environments as exemplars of the scenery and environmental qualities of Scottish Borders – Scott’s View, Jedburgh Abbey; the Tweed at Kelso etc. Emphasise the scale of the landscapes, the sense of space and the openness of the countryside.</p> <p>Joint promotion of “Find Your Own Space” short breaks for mature couples combining quality accommodation, quality food and drink, quality speciality shopping and relaxation and romance in quality environments.</p> <p>Joint promotion of facilities with a countryside focus – Bowhill, Harestanes, Tweed Valley Forest Park, Kailzie Gardens, Born in the Borders etc.</p>

	Develop and promote new events to encourage access to Scottish Borders Countryside: Farm Open Days; Forests Fortnight; Photographic competitions etc.
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11.2. Building on POTENTIAL Strengths	
11.2.1 Midlothian Events	<p>Promote Dalkeith Country Park as the main venue for large scale outdoor events in Midlothian and support the Park to attract external national and international event organisers on familiarisation visits etc.</p> <p>Develop regular small scale outdoor activity events for less committed activists – Penicuik Weekly Guided Walk; Midlothian Autumn Cycling Festival; Dalkeith to Loanhead Sponsored Monthly Charity Run etc. Link these events to other facilities – end at a local restaurant or visitor attraction; start at a railway station; provide bus transport back to the start point.</p> <p>Work with the organisers of Edinburgh festivals to bring elements of their programmes out to venues in Midlothian – Jazz at the National Mining Museum Scotland, Edinburgh Book Festival event in a local pub, Hamlet at Crichton Castle etc. Possibly develop complementary programmes that align with the Edinburgh festivals – “Fringe on the Fringe” i.e. of Edinburgh; Dalkeith Drama Festival etc.</p> <p>Develop an ongoing programme of small scale cultural events in existing local venues – folk music nights in local pubs; children’s storytelling events in family friendly restaurants; chamber quartet concerts in local leisure centres etc. Each venue develops its</p>

	<p>own programme but undertakes joint promotion with other venues under some form of Midlothian banner - “Midlothian Entertains”- or similar.</p>
<p>11.2.2 Food & Drink</p>	<p>Encourage and recognise participation in independent food and drink accreditation schemes like Michelin Stars, AA Rosettes and Taste Our Best to raise the profile of Midlothian and Scottish Borders as food destinations.</p> <p>Enhance promotion of local produce on menus – profile local suppliers, display promotional materials of local brewers in pubs, support producers and chefs to develop local speciality dishes (Borders Lamb Curry, Selkirk Bannock Desert, Bonnyrigg Bangers etc.)</p> <p>Enhance local food and drink award schemes and encourage and support participation in national awards.</p> <p>Extend Borders Food & Drink Network to include relevant businesses in Midlothian in order to encourage collaboration across local authority boundaries. (Would a rename and relaunch be needed?)</p> <p>Joint promotion of fine dining establishments in both areas. Establish criteria for membership – use of local produce, external accreditation – and promote under a “South of Scotland Dining Club” brand where consumers become members of the club and receive regular email information about exclusive offers, dining events etc. in order to build up loyalty programmes and encourage dispersal to all parts of the area.</p> <p>Support and encourage new food and drink events being piloted in Midlothian during 2015 and develop new food related events in Scottish Borders – Scottish Borders Beer Festival linking local</p>

	<p>breweries; Borders Lamb Festival when new local lamb is available in shops and restaurants; Farm Open Days etc.</p>
<p>11.2.3 Midlothian: Outdoor Activities</p>	<p>Develop further low level footpaths, cycleways and bridal paths for all abilities to encourage “soft” activity out of towns into the surrounding countryside.</p> <p>Enhance countryside and heritage interpretation on footpaths, cycleways etc. Perhaps through developing apps rather than fixed interpretive boards.</p> <p>Identify opportunities to link footpaths, cycleways etc. to other local facilities like eating places, heritage attractions, environmental art, shops etc. to create more reasons to enjoy outdoor activities. In other words, footpaths etc. become a means of getting to somewhere or something interesting rather than just paths to walk for the sake of exercise.</p>
<p>11.2.4 Built Heritage</p>	<p>Joint marketing of built heritage properties offering accommodation and/or meeting facilities around a “Midlothian Meetings” (or similar) brand that highlights the unique heritage ambiance of participating venues, their accessibility from Edinburgh and their tranquil and private surroundings.</p> <p>Additional joint marketing of built heritage facilities in Scottish Borders – “Castles & Historic Houses of the Scottish Borders” promotions: Creation of a Historic Houses Trail similar to the Borders Abbeys Way.</p> <p>Support for the extension of the opening dates of some built heritage facilities in order to reduce seasonality of tourism business. Perhaps have co-ordinated winter openings where different facilities open one or two days a week on different days. Link winter openings to special promotions with ScotRail and</p>

	partners – Fridays at Floors; Tuesdays at Traquair etc.
11.2.5 Scottish Borders: Townscapes	<p>Provide additional promotion and interpretation of high quality townscapes in Scottish Borders through audio-tours, apps etc. Perhaps develop a series of town trail apps that encourage visitors from one town to another.</p> <p>Develop regular guided walking tours of historic towns. Perhaps by costumed guides. Would there be a volunteer resource that could support such guided tours as there is in some other parts of Scotland?</p> <p>Enhance promotion of Bloom and Best Kept Village awards and encourage and support communities to enter relevant national awards.</p>
11.2.6 Scottish Borders: Packaging	<p>Support region wide collaboration between operators in all sectors to create new packages of different experiences to attract additional independent and group short break visitors through the Borders Railway. Develop different packages targeting different VisitScotland warm target segments at a variety of times of year.</p> <p>Support tour operator familiarisation visits to demonstrate available package elements and exhibit on a region-wide basis at travel trade events like VisitScotland Expo.</p> <p>Develop and promote online shopping basket facilities for independent travellers to create their own individual tailored packages in Scottish Borders.</p>
11.2.7 Midlothian: Local Heritage	<p>Revitalise and enhance Dalkeith Heritage Trail to link into the completion of works at the Corn Exchange and promote the new museum facility in the Corn Exchange as the orientation point of a Dalkeith Heritage Quarter taking in the Tolbooth, St Nicholas Church, Dalkeith Palace and other historic buildings.</p>

	<p>Support the development and promotion of the proposed Gorebridge Heritage Trail and investigate opportunities to bring unused heritage buildings in and around the railway station into new uses for both visitors and new incoming residents, possibly through commercial developers – cafes, galleries, speciality shops etc.</p> <p>Enhance the promotion of (and possibly rename) Newtongrange Mining Museum Town Trail to encourage more visitor dispersal out from the Museum into the village itself. Encourage and support product linkages between the Museum and the Dean Tavern and examine potential to incorporate footpaths around the Sun Inn more fully into the trail.</p>
<p>11.2.8 Scottish Borders: Ease of Access from Edinburgh</p>	<p>Promote the speed and regularity of rail journeys from Edinburgh to Scottish Borders and contrast with longer and less regular train journeys to competitive destinations like the Highlands and the West Coast. Emphasise the contrasting but complementary ambiance of Edinburgh and Scottish Borders.</p> <p>Ensure integration of existing local bus services with train timetables to and from Galashiels station. In particular, ensure integration of bus routes to Hawick & Selkirk, Jedburgh, Kelso and Peebles and pursue opportunities for integrated ticketing.</p> <p>Pilot new hop on, hop off bus services linking Tweedbank – Abbotsford – Melrose and Galashiels – Selkirk – St Boswells – Melrose – Galashiels. Include Bowhill Estate within the latter route and examine the timetabling and access practicalities of including Dryburgh Abbey in it too.</p> <p>Develop & promote bike hire facilities at all stations in the region. Promote safe cycle routes from each station to key local facilities.</p>

	<p>Encourage and support destinations and individual facilities to collaborate on developing and promoting new premium priced visitor transport services that cover and provide faster onward transportation to a number of different facilities – the Hawick Express, the Jedburgh Flyer etc. These could complement scheduled bus services but provide opportunities for smaller local transport operators to benefit from the railway.</p> <p>Encourage and support innovative options for premium priced onward transport options from Galashiels and Tweedbank stations – vintage vehicles; horse drawn carriages; Harley Davidson transfers; helicopter rides, hot air balloon rides etc. The greater the number of innovative transport options, the better for visitor choice and additional spend.</p>
<p>11.2.9 Midlothian: Business Tourism</p>	<p>Work with organisations and businesses in the life science clusters at Penicuik and Roslin to attract national and international association conferences and academic and scientific seminars and workshops to Edinburgh & Lothians.</p> <p>Work with existing Marketing Edinburgh Convention Bureau ambassador programme to identify and support individuals working in the life science sector who can act as advocates for conferences, seminars and workshops to be held in Edinburgh & Lothians.</p> <p>Until new accommodation and meeting facilities are developed in Midlothian, support local heritage accommodation providers to bid to host keynote speakers, invited guests etc. and work with professional conference organisers to develop social and study programmes that incorporate visits to facilities in Midlothian.</p> <p>Work with Marketing Edinburgh to develop a Midlothian sub-brand within the Edinburgh conference branding to emphasise the complementarity of Edinburgh city centre and Midlothian</p>

	business tourism facilities.
11.2.10 Scottish Borders: Sense of Place	<p>Promote and highlight the distinctive character of Scottish Borders and Borderers and how they differ from other parts of Scotland. Stress the authenticity of local culture.</p> <p>Promote both traditional and contemporary local culture to widen its appeal to different market segments including younger visitor audiences.</p> <p>Support and promote local “Pride” schemes, but ensure they all complement rather than compete with each other in order to support the promotion of a distinctive regional character without descending into town versus town parochialism.</p> <p>Work with local event organisers to widen the visitor appeal of long established local events such as Common Ridings, which some perceive to be inward looking and primarily for local rather than visitor audiences.</p>

11.3. Filling GAPS	
11.3.1 Accommodation	<p>Promote the availability of suitable sites for new, larger scale hotel developments in Midlothian and Scottish Borders and support any current hotel development proposals such as Pentland Film Studios. In particular, encourage and support a resort style hotel development for business and leisure tourism markets aligned to the Midlothian life science cluster and the development of a branded, economy hotel large enough to accommodate groups in one of the main towns in Scottish Borders, preferably Galashiels to link into the railway and its potential to generate short breaks business.</p>

	<p>Support the development of at least one large self catering holiday complex aligned to outdoor activities facilities. A complex in the Tweed Valley aligned to mountain biking and walking may be the most viable option, but other locations in Midlothian and Scottish Borders should also be considered.</p> <p>Support the development of additional caravan and camping park capacity in Midlothian and additional hostel/bunkhouse accommodation in Midlothian and Scottish Borders. Are there any unused buildings that could be adapted into hostel accommodation? Disused Borders mills could be considered and disused churches are being adapted in parts of England.</p>
<p>11.3.2 Midlothian Business Tourism</p>	<p>Research and, if viable, facilitate the development of dedicated conference and meeting facilities in Midlothian capable of accommodating 200 – 500 delegate events. Such facilities could be developed as part of the resort hotel development recommended above or could an old or currently underused building be adapted for dedicated conference and meeting use?</p> <p>Additional serviced accommodation will be essential to support the development of any large scale dedicated conference/meeting facilities.</p>
<p>11.3.3 Scottish Borders: Galashiels & Hawick Town Centres</p>	<p>Address the number of empty retail premises in Galashiels town centre by supporting Energise Galashiels to set up temporary pop-up shops for local artists, craft workers, food producers etc. and to develop regular, small scale programmes of animation in the town centre – jugglers, buskers, face painters etc.</p> <p>Support similar initiatives to address empty retail premises in Hawick.</p>

	<p>Examine the potential to showcase the work of students at Heriot Watt campus in public places in Galashiels town centre as a means of adding colour and animation and positioning the town as a centre of design excellence, particularly to younger visitor markets. Potential for a “Galashiels by Design” brand that can be used to showcase locally based students elsewhere in the UK, while also promoting the town as a contemporary visitor destination?</p> <p>Support Energise Galashiels to develop enhanced regular event programmes in Galashiels to provide more animation and colour to the town centre.</p> <p>Examine the potential to enhance the product offer and promotion of local facilities such as Old Gala House in order to position them as stronger motivations for visitors to spend more time in Galashiels.</p> <p>Support joint promotion of the textile related facilities in Hawick under a common “Scotland’s Cashmere Capital” brand that differentiates the town from competitive visitor destinations and creates an authentic promotional theme based on industrial heritage and contemporary commerce.</p>
<p>11.3.4 Midlothian Culture</p>	<p>Address the lack of dedicated performance venues in Midlothian by supporting the development of at least one small scale regular venue for live music, drama etc. Perhaps look at a capacity of 100 – 300 and consider existing private sector models elsewhere in Scotland where hotels or bard work with music promoters to develop regular programmes and disused buildings have been converted as new cultural facilities for smaller communities. Alternatively identify existing local halls that could accommodate regular live performances.</p>

	<p>Develop programming and promotion of regular small scale live performances that target mature males and couples – cult music artists with committed followings, cabaret style “tribute” acts etc.</p>
<p>11.3.5 Scottish Borders: Tweedbank</p>	<p>Provide orientation facilities at Tweedbank Station to highlight ease of access to Abbotsford, Melrose and more local facilities like Herges and Gunknowe Loch. Particularly promote safe walking routes to nearby facilities for those who do not feel the need for onward transport by bus etc.</p> <p>Provide some form of informal catering at Tweedbank Station – possibly a mobile catering unit promoting local produce.</p> <p>Position Tweedbank station as a place with innovative onward transport options that enhance the overall visitor journey – vintage vehicles, Segways, electric bikes etc.</p> <p>Develop transport options from Tweedbank station that are a visitor experience in their own right and will act as key motivators for visits to the region by rail – helicopter tours or hot air balloon rides over Scottish Borders; guided motorbike tours etc.</p> <p>Provide costumed “meet and greet” animators to welcome heritage steam train passengers to Tweedbank station. Link animators into local heritage and culture characters such as Sir Walter Scott, the Border Reivers, rugby players etc. Is there scope to develop a volunteer programme to provide and train such animators?</p>
<p>11.3.6. Midlothian: Speciality Shopping</p>	<p>Develop clusters of artists’ workshops and studios at existing facilities to provide focal points for local arts and crafts – Dalkeith Country Park, Vogrie Country Park, National Mining Museum Scotland etc. Perhaps look at Harestanes in Scottish Borders as a model.</p>

	<p>Support the development of pop up units for artists and speciality retailers in town centres with empty premises to create animation and enable retailers to market test demand for permanent facilities.</p> <p>Investigate opportunities and the incentives that might be required to develop and promote themed clusters of related speciality retailers in various towns similar to book towns, food towns etc. Think beyond the usual tourism related themes – Bespoke Furniture Manufacturers; Vintage Clothing Retailers; Milliners etc. Focus on themes that are likely to create distinctive colour in town centres.</p> <p>Promote regular arts and crafts markets for local producers in town centres to provide temporary speciality shopping outlets and provide animation to town centres.</p>
<p>11.3.7 Scottish Borders: Night Time Economy</p>	<p>Examine the potential for imaginative public lighting schemes at heritage properties or heritage quarters close to town centres. Possibly also look at sound and light installations.</p> <p>Develop regular programmes of evening entertainments at facilities that are not normally open – live outdoor theatre at Melrose Abbey; chamber music at Traquair House etc. – and also develop evening street animation in the main towns – buskers, magicians, stunt bike riders etc.</p> <p>Develop a few large scale, annual evening events that run for a number of nights akin to Perthshire’s Enchanted Forest or NVA’s occasionally performance art-sound and light installations that link into local culture and traditions.</p> <p>Promote premium priced, behind-the-scenes evening tours of heritage and other facilities after they are closed to the general</p>

	<p>public. Package such tours as elements of short break offers from local accommodation providers to encourage additional overnight stays.</p> <p>Joint promotion of “fun” dining offers where restaurants partner up to offer different courses of an evening meal and visitors move from one restaurant to another for each course. Dining safaris.</p>
<p>11.3.8 Midlothian: Sense of Place</p>	<p>Encourage and incentive more local businesses to use Midlothian rather than Edinburgh locators in their addresses and promotional materials.</p> <p>Develop and promote a single tourism identity for the adjoining individual towns along the southern edge of the Edinburgh city bypass. This would link facilities more effectively to create a stronger critical mass of product more capable of attracting visitors out from Edinburgh city centre. At the moment, too many of these towns are perceived as (and can feel like) dormitory suburbs of Edinburgh, rather than communities and destinations in their own right. Visitors tend not to go to suburbs. Use the name “Eskbank” to tie in with the railway station?</p>
<p>11.3.9 Scottish Borders: Indoor Youth Activities</p>	<p>Examine options to convert disused buildings in town centres such as old mill buildings into indoor activity centres for young people offering climbing walls, bike and skateboard parks, trampoline centres, laserquests etc., such as are available in Midlothian.</p> <p>Examine the potential to develop large scale indoor computer gaming centres in town centres where young people can compete in competitive computer sports. A modern equivalent of snooker or bowling clubs that could host regular tournament events and provide additional animation in town centres.</p>

	<p>Develop promotional links between indoor activity centres in Midlothian and complementary outdoor activity facilities in Scottish Borders. In particular, could there be cross referral and cross promotions between Transgression Park and the mountain biking at Tweed Valley Forest Park?</p>
<p>11.3.10 Midlothian: Town Centres</p>	<p>Address lack of animation through developing pop up speciality shopping units, regular arts and crafts markets, themed clusters of speciality retail outlets as previously outlined.</p> <p>Develop new public art installations in town centres and develop public art trails that could link and move visitors around different towns. We note there is already interesting public art in some town centres such as Loanhead. Could this be built on by commissioning new work by local artists?</p> <p>Brighten up town centres with additional plantings, hanging baskets, floral displays etc. Perhaps seek commercial sponsorship of these and develop seasonal themes – Dalkeith Daffodil Festival; The Roslin Rhododendrons etc.</p>

12. THE WAY FORWARD

12.1. *Where We Are*

As well as collaboration, coordination will be needed to realise the tourism opportunities of the Borders Railway and avoid duplication of effort while ensuring complementarity of activities.

We are aware that a number of initiatives are already underway to ensure coordination and collaboration at the strategic level, particularly through the partnership driving and delivering the Borders Railway Blueprint Programme. This audit and report is one of these initiatives.

We are also aware that a strong infrastructure of business support agencies and representative bodies is already in place in both Midlothian and Scottish Borders. Indeed, most of them were included in the stakeholder consultations that were undertaken to support this audit and many of them have already been active in encouraging business alignment with the railway.

Finally, we are aware that Business Gateway has been charged with leading the development of a Borders Railway Tourism Business Development Programme that will be informed by the findings and recommendations of this audit.

12.2. What We Still Need

From our findings, there are three main issues that still need to be addressed to underpin business development opportunities through the railway:

- Coordination of Business Communications
- Winning Hearts & Minds
- Capacity

12.2.1. Coordination of Business Communications

Enhanced coordination of information provision to businesses is essential. In simple terms, a majority of businesses say that they want and need further information about the railway. Much of the information they seek is already freely available but does not seem to be reaching or registering with businesses.

We appreciate many of the businesses raising this concern will have received relevant information. Nonetheless, we would recommend reviewing and simplifying business messaging about the railway and ensuring that all agencies and business groups use the same information to convey and reinforce the same key messages about the railway to local businesses.

Businesses will not support and align with something that they claim not to know enough about.

12.2.2 Hearts & Minds

We find it worrying that, while over 80% of respondents to the on-line survey undertaken as part of this audit felt that the Borders Railway would benefit tourism in Midlothian and Scottish Borders, only 40% felt it would benefit their own business. Stakeholder consultations also highlighted an unwillingness of businesses to invest time and resources in developing new products or services to align with the railway until they actually see how it operates.

This indicates that four months out from the opening of the railway, many businesses still need to be persuaded of its potential business benefits and more work needs to be done to win hearts and minds to enthuse businesses about the railway.

Clearer messaging about the railway and the launch of the Borders Railway Tourism Business Development Programme should help to persuade more businesses about the opportunities the railway can offer them, but coordinated efforts may be needed to overcome business inertia and conservatism about changing or enhancing their products and services. In particular, we would note that businesses located further away from the railway tend to be more negative about it and work may need to be done to ensure they are persuaded of the viable opportunities to maximise visitor dispersal and spread from the railway stations.

12.2.3. Capacity

We have some concerns about the capacity of representative business groups to proactively engage with large business audiences about the Borders Railway and the capacity of some individual businesses to make the most of the business development opportunities it can offer.

The stakeholder consultations generated some comments about a possible dislocation between the expectations of public sector agencies that business groups and individual businesses will take a lead in driving forward new initiatives relating to the railway, and the willingness and capacity of groups and businesses to play such a lead role.

While most business groups provide valuable support networks, they are often led and managed by volunteers, although some have very limited dedicated staffing resources. All volunteers have finite capacity, especially if they have their own businesses to run. In our view, they may need additional support to participate fully in engaging businesses with the railway.

12.3. Other Issues & Suggestions

Below, we outline three further issues and suggestions of relevance that we feel have not come out strongly enough in the factual analysis of the audit. These are also areas that would help to underpin business development opportunities.

- Customer Service Training
- Funding of Business Development Initiatives
- Consolidation of Visitor Information

12.3.1. Customer Service Training

The stakeholder consultations, online business survey and mystery shopper exercise did not pick up any significant issues relating to the quality of customer service in either Midlothian or Scottish Borders. The few stakeholders and businesses that did raise this issue did so in terms of identifying a possible need for local product knowledge training of front line staff in order to assist and advise visitors travelling by rail.

However, the Tourism Scotland 2020 strategy calls for a constant push to improve quality standards and enhance customer satisfaction as a means of providing for growth and the success of the online “Glasgow Welcomes” customer service training programme, which has subsequently been adapted and tailored to other areas of Scotland, is widely accepted. We are not aware of any existing programmes of this nature running in Midlothian and Scottish Borders and suggest there may be scope to develop a local version of this programme tailored to the Borders Railway.

Delivery of such a programme could enhance the visitor experience of both areas and engage and align more local businesses with the railway.

12.3.2. Funding of Business Development Initiatives

A number of funding programmes have been developed in Scotland to support new collaborative private-sector marketing and product development initiatives. Many of these programmes invite funding bids from eligible consortia, which are often assessed on a competitive basis.

Prime examples are the VisitScotland Growth Fund, which supports marketing collaborations that link into and support the national tourism strategy, and the Edinburgh City of Literature Trust Literary Tourism Innovation Fund, which was set up by Edinburgh UNESCO City of Literature Trust, Scottish Enterprise and Edinburgh Tourism Action Group to support the development of new literary products and experiences in Edinburgh

Would there be potential to establish a Borders Railway Challenge Fund (or Innovation Fund) as a competitive grant programme to support collaborative and innovative new projects or developments that seek to grow tourism or enhance the visitor experience through alignment with the railway?

12.3.3. Consolidation of Visitor Information

While we appreciate and support the right of any individual business or organisation to promote itself and service visitor information needs as and how it sees fit, it has to be said that there is a plethora of often confusing and sometimes contradictory visitor information available online and in printed format. This is particularly true in Scottish Borders where there are a greater number of tourism products and services and leaflet display racks almost groan under the weight of different titles and online searches bring up a wide range of different tourism focused websites, some of which appear to be significantly out of date.

We are aware that Midlothian Tourism Forum is progressing the development a new Visit Midlothian website. We are not aware of any similar initiatives in Scottish Borders, where most existing sites appear to be commercially driven and reliant on advertising income or cover only parts of the region. Many of them also appear to lack even basic search engine optimisation.

Will there be a dedicated Borders Railway website and printed material and could they be used as catalysts for consolidating the current expanse of visitor information into fewer, higher profile information sources that promote a variety of different experiences?

13. WHERE WE CAN BE IN 10 YEARS TIME

If the different business development opportunities arising from the Borders Railway are realised, how might tourism in Midlothian and Scottish Borders look in 2025?

Looking into our crystal ball, we suggest that by 2025 the Borders Railway could:

- Be internationally recognised as one of the great scenic railways of the UK and a must-see element of any visit to Edinburgh and Scotland.
- Help to generate regular and on-going print, broadcast and online media coverage of tourism and visitor facilities in Midlothian and Scottish Borders.
- Achieve annual visitor passenger numbers in excess of original objectives.
- Transport regular repeat visitors who have developed loyalty to Midlothian and Scottish Borders, as well as growing numbers of first time visitors.
- Have been a catalyst in changing the age profile of visitors to Midlothian and Scottish Borders by supporting the development of new products and services that appeal to young professional and family markets.
- Support the extension of the average length of visitor stay in both areas through acting as a catalyst for new and innovative packaging of products and services.
- Provide a range of integrated ticketing options that are used by a majority of visitors travelling on the railway and are the envy of other, competitive destinations.
- Have supported new collaborations between tourism operators, which have increased visitor satisfaction ratings of Midlothian and Scottish Borders. These include new packaging of visitor products such as transport, accommodation, events and admission to attractions.
- Regularly carry large numbers of additional passengers travelling to an expanding portfolio of events in both areas.

- Helped to attract new investment in visitor facilities and expanded employment in tourism in Midlothian and Scottish Borders.
- Be recognised as the most efficient, convenient and enjoyable way to combine urban and rural visitor experiences in Scotland.
- Generate high levels of recommendations and referrals from satisfied visitors.
- Be regarded as part of the core fabric of Midlothian and Scottish Borders and a facility that has the full support and engagement of all local businesses.

14. SUMMARY & CONCLUSIONS

Tourism and Leisure Solutions and Sue Crossman, Tourism Projects & Consultancy, are grateful for the opportunity to develop this audit and supporting report and would like to thank the many individuals and organisations who have assisted us during this project. We value the input of everyone who has contributed views, ideas and feedback and hope this report will help to progress tourism business development opportunities in Midlothian and Scottish Borders.

It has been a pleasure to travel around Midlothian and Scottish Borders for client meetings, stakeholder consultations and mystery shopper visits. This travel has reinforced our appreciation of the qualities of the visitor experience in both areas and our confidence in the ability and willingness of tourism operators to enthuse visitors and generate repeat visits, recommendations and referrals.

It is clear that the Borders Railway is already having a positive impact on Midlothian and Scottish Borders in terms of supporting the construction of new housing and business premises. We are confident it will have a similarly positive impact on tourism in both areas, by bringing visitor markets closer and stimulating new tourism developments and collaborations that attract new market segments.

The caveat we would emphasise again is that coordination and collaboration will be needed to maximise tourism business development opportunities generated by the railway. Local tourism businesses must embrace the railway and work with it.

The railway will not deliver tourism benefits if every business sits back and waits for someone else to take the lead in initiating the development of new products and services. It will not deliver tourism benefits if every business sits in its own little silo and only collaborates with others in the same sector or the same local community. A wider vision is needed to make the most of the tourism opportunities the Borders Railway can bring.

Douglas Ritchie, Tourism and Leisure Solutions

Sue Crossman, Tourism Projects & Consultancy

May 2015

APPENDIX 3

LIST OF STAKEHOLDERS CONSULTED

1. Abellio/ScotRail – Nesta Gilliland, Head of Marketing
2. Abbotsford – Giles Ingram, Chief Executive
3. Austin Travel Group/Scotline Tours Edinburgh – Douglas Austin, Director
4. Borders Chamber of Commerce – Bruce Simpson, Communications Manager (also represents Borders Business Forum)
5. Borders Food & Drink Forum – John Henderson, Chair
6. Borders Railway Blueprint – Sam Smith, Manager
7. Business Gateway – Phil McCreadie, Manager, & Steve Osborne, Tourism Business Advisor
8. Dalkeith Country Park – Iain Herbert, Visitor Services Manager
9. First Group – Brian Peat, Marketing Manager
10. Forestry Commission Scotland – Hugh McKay, Recreation & Tourism Manager
11. Galashiels Town Centre – Steve Revell, Coordinator
12. Gorebridge Conservation Area Regeneration Scheme (CARS) – Rod Lugg, Manager
13. Herges on the Loch, Tweedbank – Sandy Craig, Proprietor

14. Lothian Buses/Edinburgh Bus Tours – Elaine Green, sales Manager, & Kenny Campbell, Operations Manager
15. Midlothian Council – Karl Vantners, Principal Officer, Public Transport
16. Midlothian & East Lothian Chamber of Commerce – George Archibald, Chief Executive, Dita McFarlane, Chamber Manager, & Dorothy Webster, Business Development Executive
17. Midlothian Tourism Forum – Ian Gardner, Chair, & Simon Beattie, Secretary (both also represent Rosslyn Chapel)
18. National Mining Museum Scotland – Gillian Rankin, Marketing & Events Officer
19. Perrymans Buses – Gary McBride, Assistant Operations Manager
20. Scottish Enterprise – Frank Beattie, Stakeholder & Partnerships Senior Executive
21. Scottish Enterprise – Paul McCafferty, Tourism Sector Team Leader
22. Scottish Enterprise – Katrina Morrison, Senior International Tourism Manager (also represents Scottish Development International Inward Investment)
23. Scottish Enterprise – Mike Tucker, Account Manager for Dalkeith Country Park & Abbotsford
24. Scottish Enterprise – Stephen Williamson, Senior Executive, Tourism Business & Skills
25. Scottish Borders Council – Councillor Stuart Bell, Executive Member for Economic Development.
26. Scottish Borders Council – Jane Warcup, Events Officer, & Julie Hogg, Principal Officer (Regeneration)
27. Scottish Borders Heritage Festival – Julie Nock, Project Officer
28. Scottish Borders Tourism Partnership – Tom Burnham, Chair
29. Southern Uplands Partnership – Pip Tabor, Project Manager
30. Traquair House – Catherine Maxwell-Stuart, Owner
31. VisitScotland – Manuela Calchini, Regional Partnerships Director, South of Scotland
32. VisitScotland – Paula McDonald, Regional Director, Borders and Dumfries & Galloway

APPENDIX 4**BREAKDOWN OF ONLINE BUSINESS SURVEY RESPONSES****4.1. Breakdown of Respondents by Location**

Respondents by Location	Scottish Borders Respondents	Midlothian Respondents	Total Respondents
Overall	68	21	89
Melrose	11		11
Jedburgh	9		9
Peebles	8		8
Hawick	7		7
Selkirk	7		7
Galashiels	6		6
Newcastleton	5		5
Kelso	4		4

Innerleithen	3		3
Stow	2		2
Earlston	1		1
Lauder	1		1
Newtown St Boswells	1		1
St Boswells	1		1
Others	2		2
Lasswade		6	6
Dalkeith		4	4
Loanhead		2	2
Bonnyrigg		2	2
Gorebridge		2	2
Roslin		2	2
Mayfield		1	1
Newtongrange		1	1
Pathhead		1	1

4.2. Breakdown of Respondents by Sector

Respondents by Sector	Scottish Borders Respondents	Midlothian Respondents	Total Respondents
Overall	68	21	89
Guest House/Bed & Breakfast	16	2	18
Self Catering	15	2	17
Speciality Retailer	8	1	9
Gallery/Studio	6	0	6
Hotel	3	2	5
Café/Restaurant/Bar	2	2	4
Cycling Operator	2	2	4
Camping & Caravanning	1	2	3
Built Heritage Property	0	2	2
Coach Operator	0	2	2

Event	2	0	2
Museum/Heritage Centre	2	0	2
Other Activity	2	0	2
Organisation	2	0	2
Taxi Operator	0	2	2
Wildlife Facility	1	1	2
Angling Operator	1	0	1
Business Tourism Facility	1	0	1
Country Sports Operator	1	0	1
Equestrian Operator	1	0	1
Golf Club/Operator	1	0	1
Theatre	1	0	1
Visitor Facility (Other)	0	1	1