Scottish Canals Monitoring Report
2010-2015
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Scottish Canals Economic Monitoring
Headline Statistics 2003 - 2015

Scottish Canals Network

- 5,425 Housing Units
- 5,052 Estimated Employment (FTES)
- 4,701 Construction Jobs
- £878m Estimated Investment
- 178,887 Employment Floorspace (sq.m)
### Scottish Canals Economic Monitoring

#### Impact Between Reporting Periods

<table>
<thead>
<tr>
<th></th>
<th>2003 - 2009</th>
<th>2010 - 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Lowland Canal Network</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Housing Units</td>
<td>1,726</td>
<td>3,221</td>
</tr>
<tr>
<td>Employment Floorspace (sq.m)</td>
<td>103,420</td>
<td>71,456</td>
</tr>
<tr>
<td>Estimated Employment (FTES)</td>
<td>2,939</td>
<td>1,995</td>
</tr>
<tr>
<td>Estimated Investment</td>
<td>£323m</td>
<td>£510m</td>
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<tr>
<td>Construction Jobs</td>
<td>622</td>
<td>3,963</td>
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<td><strong>Highland Canals</strong></td>
<td></td>
<td></td>
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<tr>
<td>Housing Units</td>
<td>243</td>
<td>235</td>
</tr>
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<td>Employment Floorspace (sq.m)</td>
<td>2,149</td>
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<td>£22m</td>
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<tr>
<td>Construction Jobs</td>
<td>42</td>
<td>75</td>
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</table>
Scottish Canals Economic Monitoring
Total Monetised Health Benefits

Scottish Canals Network

£10,735,659
2012

£12,987,865
2013

£11,015,429
2014

£11,974,465
2015

£10,761,131
2016
1 Introduction

1.1.1 PBA has been commissioned by Scottish Canals to estimate economic development and activity around the Scottish Canal network since 2010. It examines economic activity in the Forth & Clyde, Union, Caledonian and Crinan Canal Corridors.

1.1.2 The report follows on from previous canal monitoring work carried out by PBA (then Roger Tym & Partners) which identified completed and potential development activity across Scotland’s canal network. The previous reports recorded economic activity between 2003 and 2010.

1.1.3 This report estimates the economic impacts of development activity either completed or proposed within 1km of Scotland’s canals between 2010 and 2015. It captures all known (or potential) development within these corridors and highlights cumulative development between 2003 and 2015.

1.1.4 The report also examines the impact of canal side activities in terms of increases in visitor numbers and spend and associated impacts in terms of economic benefits from towpath users.

1.1.5 The report also contains analysis of the effect of Scottish Canals’ investment in the Lowland canal network on deprivation indices, comparing 2004 and 2012 Scottish Index of Multiple Deprivation (SIMD) figures with those published in 2016.

1.1.6 Finally, the report provides a description of activity at key nodal points and development sites.

1.1.7 The Report contains the following sections:

- Chapter 2: Summary of canal corridor development outputs: new housing units, construction jobs, employment floorspace and associated jobs and overall levels of construction investment;
- Chapter 3: Assessment of canalside activity: visitor numbers and expenditure; boating information (where available); health impacts;
- Chapter 4: Deprivation analysis;
- Chapter 5: A review of activity at key nodal points on the canal network; and
- Chapter 6: Conclusions

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1 Focussing on the Forth and Clyde and Union Canals
2 Please note that a direct comparison cannot be carried out as the data zone boundaries have been changed (the 2004 and 2012 survey used 2001 Data Zone boundaries, whereas the 2016 survey used 2011 boundaries).
2 Key Development Outputs

2.1 Introduction

2.1.1 This chapter highlights key development outputs from Scotland’s Canal network between 2004 and 2015.

2.2 Project Overview

2.2.1 Comprehensive economic monitoring of development and business activity in Scotland’s canal corridors was last completed by PBA in 2009. Subsequent monitoring reports did not have a development focus. The 2009 report examined development and economic activity in the Lowland Canals corridor, including the Forth & Clyde and Union Canals, and the Highland Canal corridor, including the Caledonian and Crinan Canals. Its headline findings are presented below:

Table 2.1 Outputs from 2009 Economic Monitoring Study

<table>
<thead>
<tr>
<th>Area</th>
<th>Housing Units</th>
<th>Employment Floorspace (sq.m)</th>
<th>Estimated Employment (FTES)</th>
<th>Estimated Investment (£m)</th>
<th>Construction Jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lowland Canal Network</td>
<td>1,726</td>
<td>103,420</td>
<td>2,939</td>
<td>£323.4</td>
<td>622</td>
</tr>
<tr>
<td>Highland Canal Network</td>
<td>243</td>
<td>2,149</td>
<td>45</td>
<td>£21.9</td>
<td>42</td>
</tr>
<tr>
<td>Total</td>
<td>1,969</td>
<td>105,672</td>
<td>2,984</td>
<td>£345.3</td>
<td>664</td>
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</tbody>
</table>

2.2.2 This report examines activity since 2010 and provides an update of development and business activity to 2015. The update has involved analysis of planning applications and completed development along each of the canals in the Lowland and Highland Networks. Nine local authorities (LAs) have been contacted to provide relevant development planning data and information: Glasgow City, City of Edinburgh, West Dunbartonshire, East Dunbartonshire, North Lanarkshire, Falkirk, West Lothian, Highland and Argyll and Bute. Each authority was sent a development schedule to update with new planning applications or recent completions along the canal corridor (1km either side of the canal)3. Responses were received from all LAs.

2.2.3 Economic growth generally characterised most of the 2003-2009 period, before the onset of recession in 2008. This contrasts with 2010 - 2015, which witnessed much tighter availability of public and private finance and depressed levels of demand. Some confidence has since returned to the development sector. The findings of the activity analysis should be regarded in this context.

2.2.4 Consistent with the previous study, the following core indicators were assessed:

- Housing units developed
- Employment floorspace created

3 Apart from Glasgow where the boundary was 0.5km.
2.2.5 Development outputs are summarised in the following sections.

2.3 Development Outputs 2010 -2015

Lowland Canal Network

Completed Development

2.3.1 Table 2.2 reports the key economic outputs along the Forth and Clyde (F&C) and Union Canals, based on implemented development consents (from review of initiation of development returns, Council data on housing completions and online searches).

Table 2.2 Completed Development (2010-2015): Lowland Canal

<table>
<thead>
<tr>
<th>Area</th>
<th>Housing Units</th>
<th>Employment Floorspace (sq.m)</th>
<th>Estimated Employment (FTES)</th>
<th>Estimated Investment (£m)</th>
<th>Construction Jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td>West Dunbartonshire(F&amp;C)</td>
<td>211</td>
<td>15,843</td>
<td>579</td>
<td>£48.7</td>
<td>559</td>
</tr>
<tr>
<td>Glasgow (F&amp;C)</td>
<td>627</td>
<td>14,703</td>
<td>122</td>
<td>£72.4</td>
<td>512</td>
</tr>
<tr>
<td>East Dunbartonshire (F&amp;C)</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>£3.6</td>
<td>32</td>
</tr>
<tr>
<td>North Lanarkshire (F&amp;C)</td>
<td>357</td>
<td>4,983</td>
<td>112</td>
<td>£25.5</td>
<td>217</td>
</tr>
<tr>
<td>Falkirk (F&amp;C)</td>
<td>107</td>
<td>371</td>
<td>19</td>
<td>£55.9</td>
<td>555</td>
</tr>
<tr>
<td>Falkirk (Union)</td>
<td>343</td>
<td>100</td>
<td>5</td>
<td>£31.2</td>
<td>309</td>
</tr>
<tr>
<td>Edinburgh (Union)</td>
<td>956</td>
<td>35,156</td>
<td>1,159</td>
<td>£219.1</td>
<td>1,078</td>
</tr>
<tr>
<td>West Lothian (Union)</td>
<td>620</td>
<td>300</td>
<td>0</td>
<td>£54.2</td>
<td>700</td>
</tr>
<tr>
<td>Lowland Canal Network Total</td>
<td>3,221</td>
<td>71,456</td>
<td>1,995</td>
<td>£510.6</td>
<td>3,963</td>
</tr>
</tbody>
</table>

2.3.2 Despite relatively depressed economic conditions, the Lowland Canal Corridors saw considerable development between 2010 and 2015. Estimated investment in canalside areas in Edinburgh has exceeded £200m, including housing development in areas such as Ratho, Fountainbridge, Edinburgh West End and Wester Hailes. Proximity to the Union Canal is commonly used as a selling point in marketing brochures.

2.3.3 Four hotels have been built close to the Union Canal at Fountainbridge, Coates and Edinburgh Park. Over 35,000 sq.ft of retail, general industry, food & drink and office floorspace was developed in Edinburgh’s canal corridor between 2010 and 2015.

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4 Employment is based on applying employment densities to floorspace created. As a result, the jobs stated in this report are based on the assumption that all employment floorspace has been taken up with no vacancies. The jobs estimated are therefore based on a best case scenario.
2.3.4 In Falkirk the c.£50m Helix project opened gradually from 2013, with the Kelpies completed and open by April 2014 (other elements include a Canal Hub and a canal extension along the River Carron to the Forth, officially opened in 2015). This canal-related development received over 952,000 visitors between 2014 and 2015, making it one of the most popular visitor attractions in Scotland.

2.3.5 Nearby, 343 homes have been constructed by Kier at Redding Bank. Again, marketing material highlights canal proximity as a key benefit.

2.3.6 Significant housing development has taken place or is scheduled in West Lothian, with over 600 new homes due to be completed. This includes 230 new homes as part of a £18.1 million development on land at Kirkhill, Broxburn.

2.3.7 In Glasgow, canalside locations such as Netherton, Maryhill, Firhill and Ruchill have also seen residential development. The majority of housing is flatted/terrace development. This includes construction of 141 new homes in Sighthill, part of the wider £250m masterplan regeneration of the area.

2.3.8 Maryhill Housing Association (MHA) has built 125 homes as part of Phase 2 of the Maryhill Locks development. The vision is to create a development which maximises engagement with the Forth and Clyde Canal.

2.3.9 Another noteworthy development is the opening of the Pinkston Watersports facility in Port Dundas. In the same area, Scottish Canals was one of the key partners in the Port Dundas Charrette which developed a vision for the area’s future development through intensive business and community engagement (the other partners Glasgow City Council and the Scottish Government).

2.3.10 The Whisky Bond at Speirs Locks has now been redeveloped. Part of the building is now used by Glasgow’s Sculpture Studio, which has 36 studios (approximately 2,400 sq.m), and it forms part of a growing creative neighbourhood around Glasgow’s canal network.

2.3.11 Scottish Canals and Bigg Regeneration (a partnership between igloo and Scottish Canals) in association with Glasgow City Council have plans for significant further regeneration along the Glasgow Canal network. Recently grant funding was approved to regenerate areas and communities along both sides of the Forth and Clyde canal. Plans include a surface water management programme that will enable land near the canal to be regenerated. Sites marked for regeneration include regenerating the vacant 100 Acre Hill former distillery site in Port Dundas. Further detail on this is provided in Case Study Chapter of this report.

2.3.12 In North Lanarkshire, canalside residential development has been largely focussed in Coatbridge, including completion of 114 homes as part of Phase 1 of Calderwood Village. Elsewhere some 5,000 sq.m of retail, office and industry floorspace has been developed in locations such as Coatbridge, Cumbernauld, Kilsyth and Croy.

2.3.13 In West Dunbartonshire, canalside development has been concentrated in and around Clydebank, with the creation of 200 new houses and nearly 6,000 sq.m of industrial floorspace. Construction of a £22m leisure centre on the site of the former John Brown’s shipyard in Clydebank is in progress. At Bowling Basin, railway arches have been refurbished to form 6 retail, café and business units as part of wider plans to regenerate the western gateway to the Forth and Clyde Canal. The project was awarded £782,413 in funding from Coastal Communities Fund (CCF) in January 2015 (further detail is provided in the Case Study Chapter of this report).

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5 http://www.glasgowcanal.co.uk/regeneration-projects/maryhill-locks
6 https://www.scottishcanals.co.uk/projects-opportunities/opportunities/bowling-basin-arches-to-let/
Potential Development

2.3.14 LA returns also indicated where planning permissions have either to be implemented or where applications have yet to be determined, showing where future development is anticipated along the canal network.

2.3.15 Table 2.3 estimates the economic value associated with potential development over the next 5 years (assuming an average of 5 years from consent to completion).

Table 2.3 Potential Development: Lowland Canal Network (2015-2025)

<table>
<thead>
<tr>
<th>Area</th>
<th>Housing Units</th>
<th>Employment Floorspace (sq.m)</th>
<th>Estimated Employment (FTES)</th>
<th>Estimated Investment (£m)</th>
<th>Construction Jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td>West Dunbartonshire (F&amp;C)</td>
<td>27</td>
<td>15,816</td>
<td>626</td>
<td>£18.4</td>
<td>202</td>
</tr>
<tr>
<td>Glasgow (F&amp;C)</td>
<td>194</td>
<td>20,848</td>
<td>413</td>
<td>£120.7</td>
<td>854</td>
</tr>
<tr>
<td>East Dunbartonshire (F&amp;C)*</td>
<td>9</td>
<td>1,210</td>
<td>19</td>
<td>2.6</td>
<td>23</td>
</tr>
<tr>
<td>North Lanarkshire (F&amp;C)</td>
<td>247</td>
<td>13,494</td>
<td>325</td>
<td>£32.8</td>
<td>252</td>
</tr>
<tr>
<td>Falkirk (F&amp;C)</td>
<td>98</td>
<td>0</td>
<td>0</td>
<td>£7.8</td>
<td>77</td>
</tr>
<tr>
<td>Falkirk (Union)</td>
<td>35</td>
<td>2,200</td>
<td>15</td>
<td>£6.7</td>
<td>66</td>
</tr>
<tr>
<td>Edinburgh (Union)</td>
<td>1,080</td>
<td>77,138</td>
<td>5,814</td>
<td>£257.0</td>
<td>1,188</td>
</tr>
<tr>
<td>West Lothian (Union)*</td>
<td>359</td>
<td>0</td>
<td>0</td>
<td>33</td>
<td>431</td>
</tr>
<tr>
<td><strong>Lowland Canal Network Total</strong></td>
<td><strong>2,049</strong></td>
<td><strong>130,706</strong></td>
<td><strong>7,211</strong></td>
<td><strong>£479.3</strong></td>
<td><strong>3,093</strong></td>
</tr>
</tbody>
</table>

*estimate*

2.3.16 In Edinburgh, further large scale development is planned in Fountainbridge. Planning permissions are in place for housing (over 400 homes), a hotel (360 rooms) and commercial (over 60,000 sq.m in office space) development. The £200m Haymarket development (which includes three office buildings, leisure space and a hotel development) could create over 3,600 jobs with the first phase of development set for completion in 2017.

2.3.17 Development is also anticipated in various locations across Glasgow. In Port Dundas potential development includes a new brewery production site along with associated bar and restaurant (although this may be unlikely to proceed). Housing development around Maryhill/Firhill (over 100 units) and student housing development in Townhead (296 rooms) could generate investment of £24m.

2.3.18 In West Dunbartonshire, a mix of industrial and commercial floorspace in the Clydebank area has been approved. In North Lanarkshire, residential consents have been granted in Coatbridge, Holytown, Kilsyth and Bargeddie. A mix of employment floorspace (office and industry) is also anticipated in Bargeddie and Holytown.

2.3.19 In Falkirk, the Falkirk Local Development Plan promotes a variety of opportunities within a canal regeneration corridor, including the Portdownie site which has capacity for 500 homes with potential business and leisure uses as well as a new mooring basin.

As no return was provided, an estimate of development has been calculated using the proportion of development from the previous study.
Highland Canal Network

Completed Development

2.3.20 Table 2.4 shows known outputs from completed developments in the Highland Canal network between January 2010 and December 2015. This is based on a review of Highland and Argyll and Bute Council approved applications.

Table 2.4 Completed Development (2010-2015): Highland Canal Network

<table>
<thead>
<tr>
<th>Area</th>
<th>Housing Units</th>
<th>Employment Floorspace (sq.m)</th>
<th>Estimated Employment (FTES)</th>
<th>Estimated Investment (£m)</th>
<th>Construction Jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caledonian Canal</td>
<td>205</td>
<td>966</td>
<td>47</td>
<td>£18.0</td>
<td>35</td>
</tr>
<tr>
<td>Crinan Canal</td>
<td>30</td>
<td>793</td>
<td>25</td>
<td>£4.1</td>
<td>40</td>
</tr>
<tr>
<td>Highland Canal Network Total</td>
<td>235</td>
<td>1,759</td>
<td>72</td>
<td>£22.0</td>
<td>75</td>
</tr>
</tbody>
</table>

2.3.21 Alongside the Caledonian Canal, development has generally concentrated in Inverness, including 180 new homes, a number of industrial units and a new skatepark.

2.3.22 Other development includes the Loch Ness Shores camping and caravanning site.

2.3.23 Alongside the Crinan Canal an estimated £4m has been invested. Developments include work at the Clock Tower in Ardrishaig where refurbishment has also provided a new retail unit, offices, café, shower/toilet and laundry facilities.

Potential Development

2.3.24 Table 2.5 summaries the estimated economic outcomes from potential development along the Highland Canal Network.

Table 2.5 Potential Development: Highland Canals

<table>
<thead>
<tr>
<th>Area</th>
<th>Housing Units</th>
<th>Employment Floorspace (sq.m)</th>
<th>Estimated Employment (FTES)</th>
<th>Estimated Investment (£m)</th>
<th>Construction Jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caledonian Canal</td>
<td>409</td>
<td>6,945</td>
<td>329</td>
<td>£51.4</td>
<td>99</td>
</tr>
<tr>
<td>Crinan Canal</td>
<td>14</td>
<td>1,875</td>
<td>94</td>
<td>£4.5</td>
<td>45</td>
</tr>
<tr>
<td>Highland Canal Network Total</td>
<td>423</td>
<td>8,820</td>
<td>423</td>
<td>£55.9</td>
<td>144</td>
</tr>
</tbody>
</table>

2.3.25 Various planning permissions\(^8\) in the Highland Canal corridor have yet to be implemented including:

- Employment: Over 3,000 sq.m of business and industrial floorspace could be developed in Inverness with some potential floorspace in Fort William and Fort Augustus. There is also potential for a new supermarket in Lochgilphead.

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\(^8\) Highland Council planning application returns
Housing: The main locations for potential housing developments are in the Inverness area. There are also planning permissions for housing development at Spean Bridge, Fort Augustus, Fort William and Cairnbaan.

New Jacobite Cruises operating base comprising harbour/berthing and visitor centre including restaurant, retail facilities and office accommodation. Associated investment is estimated at £2.5m with the potential to create approximately 38 FTEs.

Brackla Harbour Development including visitor and tourist facilities, new jetty and small craft moorings. The estimated £2.5m investment has the potential to create 24 FTEs.

Relocation of Torvean Golf Club in Inverness. Investment is estimated at £8.2m with the potential to create over 60 construction jobs.

2.4 Cumulative Development Outputs

2.4.1 Table 2.6 shows completed development along the Lowland and Highland Canal Networks since 2003:

Table 2.6 Cumulative Development (2003-2015) along the Scottish Canal Network

<table>
<thead>
<tr>
<th>District (Canal)</th>
<th>Housing Units</th>
<th>Employment Floorspace (sq.m)</th>
<th>Estimated Employment (FTES)</th>
<th>Estimated Investment (£m)</th>
<th>Construction Jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td>West Dunbartonshire (F&amp;C)</td>
<td>197</td>
<td>7,000</td>
<td>89</td>
<td>£77.5</td>
<td>149</td>
</tr>
<tr>
<td>2010-2015</td>
<td>211</td>
<td>15,843</td>
<td>579</td>
<td>£48.7</td>
<td>559</td>
</tr>
<tr>
<td>Glasgow (F&amp;C)</td>
<td>584</td>
<td>148</td>
<td>66</td>
<td>£44.3</td>
<td>85</td>
</tr>
<tr>
<td>2010-2015</td>
<td>627</td>
<td>14,703</td>
<td>122</td>
<td>£72.4</td>
<td>512</td>
</tr>
<tr>
<td>East Dunbartonshire (F&amp;C)</td>
<td>7</td>
<td>18,437</td>
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<td>£33.1</td>
<td>64</td>
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<tr>
<td>2010-2015</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>3.6</td>
<td>32</td>
</tr>
<tr>
<td>North Lanarkshire (F&amp;C)</td>
<td>0</td>
<td>450</td>
<td>29</td>
<td>£3.7</td>
<td>7</td>
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<tr>
<td>2010-2015</td>
<td>357</td>
<td>4,983</td>
<td>112</td>
<td>£25.5</td>
<td>217</td>
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<tr>
<td>Falkirk (F&amp;C)</td>
<td>307</td>
<td>52,348</td>
<td>1,292</td>
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<td>97</td>
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<tr>
<td>2010-2015</td>
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<td>19</td>
<td>£55.9</td>
<td>591</td>
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<tr>
<td>Falkirk (Union)</td>
<td>303</td>
<td>0</td>
<td>0</td>
<td>£25.8</td>
<td>50</td>
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<tr>
<td>2010-2015</td>
<td>343</td>
<td>100</td>
<td>5</td>
<td>£31.2</td>
<td>309</td>
</tr>
<tr>
<td>West Lothian (Union)</td>
<td>20</td>
<td>353</td>
<td>19</td>
<td>£1.7</td>
<td>3</td>
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<tr>
<td>2010-2015</td>
<td>620</td>
<td>300</td>
<td>0</td>
<td>54.2</td>
<td>700</td>
</tr>
<tr>
<td>District (Canal)</td>
<td>Housing Units</td>
<td>Employment Floorspace (sq.m)</td>
<td>Estimated Employment (FTES)</td>
<td>Estimated Investment (£m)</td>
<td>Construction Jobs</td>
</tr>
<tr>
<td>------------------------</td>
<td>---------------</td>
<td>------------------------------</td>
<td>----------------------------</td>
<td>--------------------------</td>
<td>-------------------</td>
</tr>
<tr>
<td>Edinburgh (Union)</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>2003-2009</td>
<td>308</td>
<td>24,684</td>
<td>1,024</td>
<td>£86.6</td>
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</tr>
<tr>
<td>2010-2015</td>
<td>956</td>
<td>35,156</td>
<td>1,159</td>
<td>£219.1</td>
<td>1,078</td>
</tr>
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<td>Forth &amp; Clyde Canal</td>
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</tr>
<tr>
<td>2003-2009</td>
<td>1,095</td>
<td>78,383</td>
<td>1,896</td>
<td>£209.3</td>
<td>402</td>
</tr>
<tr>
<td>2010-2015</td>
<td>1,302</td>
<td>35,900</td>
<td>831</td>
<td>£206.2</td>
<td>1,876</td>
</tr>
<tr>
<td>Union Canal</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2003-2009</td>
<td>631</td>
<td>25,037</td>
<td>1,043</td>
<td>£114.1</td>
<td>219</td>
</tr>
<tr>
<td>2010-2015</td>
<td>1,919</td>
<td>35,556</td>
<td>1,164</td>
<td>£304.4</td>
<td>2,087</td>
</tr>
<tr>
<td>The Lowland Canal Network</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2003-2009</td>
<td>1,726</td>
<td>103,420</td>
<td>2,939</td>
<td>£323.4</td>
<td>622</td>
</tr>
<tr>
<td>2010-2015</td>
<td>3,221</td>
<td>71,456</td>
<td>1,995</td>
<td>£510.6</td>
<td>3,963</td>
</tr>
<tr>
<td>Caledonian Canal</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2004-2009</td>
<td>155</td>
<td>1,742</td>
<td>29</td>
<td>£13.8</td>
<td>27</td>
</tr>
<tr>
<td>2010-2015</td>
<td>205</td>
<td>966</td>
<td>47</td>
<td>£18.0</td>
<td>35</td>
</tr>
<tr>
<td>Crinan Canal</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2004-2009</td>
<td>88</td>
<td>407</td>
<td>16</td>
<td>£8.1</td>
<td>15</td>
</tr>
<tr>
<td>2010-2015</td>
<td>30</td>
<td>793</td>
<td>25</td>
<td>£4.1</td>
<td>40</td>
</tr>
<tr>
<td>Highland Canals</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2004-2009</td>
<td>243</td>
<td>2,149</td>
<td>45</td>
<td>£21.9</td>
<td>42</td>
</tr>
<tr>
<td>2010-2015</td>
<td>235</td>
<td>1,759</td>
<td>72</td>
<td>£22.0</td>
<td>75</td>
</tr>
<tr>
<td>All Canals</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2003-2009</td>
<td>1,969</td>
<td>105,672</td>
<td>2,984</td>
<td>£345.3</td>
<td>664</td>
</tr>
<tr>
<td>2010-2015</td>
<td>3,456</td>
<td>73,215</td>
<td>2,067</td>
<td>£532.6</td>
<td>4,037</td>
</tr>
<tr>
<td>Total</td>
<td>5,425</td>
<td>178,887</td>
<td>5,052</td>
<td>£878.0</td>
<td>4,701</td>
</tr>
</tbody>
</table>

**Lowland Canal Network**

2.4.2 Despite the recession in 2008 housing development in the Lowland Canal corridor has increased significantly. Between 2003-2009 an estimated 1,726 homes were built, compared with 3,221 (an 86% increase) from 2010 to 2015. It is worth noting that housing completions across the respective local authority areas fell over the same period. Between 2005-2009, there were 40,696 housing completions in Council areas in the Lowland Canal Network.
Between 2010 and 2014 there were some 24,711 completions (a reduction of 39%). Housing completions over the same period across Scotland were also a third lower than 2004-2009.

2.4.3 Estimated related investment and construction jobs created in the Lowland Canal corridor have also risen substantially (58% and 537% respectively) relative to 2003-2009 figures.

2.4.4 The pattern of investment in residential development is not mirrored for employment generating and other uses however. The area of employment floorspace developed and associated employment has grown much more slowly over the last 5 years. At the national level, growth has been limited. In 2015 there were 95,000 more people in the workforce in Scotland than in 2009, an increase of by 4%, the rate of growth being influenced by the recession.

Highland Canal Network

2.4.5 Residential development outputs in the Highland Canal corridor have remained fairly consistent. The number of housing units built between 2010 and 2015 is comparable to pre-recession figures (2004-2009), only 3% lower. This varies significantly from trends across the Highland and Argyll and Bute Council areas: between 2004-2009, some 9,118 houses were built; house completions 2010-2014 were 34% lower at 6,002, similar to the trend across Scotland as a whole.

2.4.6 Between 2010-2015, estimated employment associated with Highland Canal corridor development was 60% greater than that experienced between 2004 and 2009, potentially associated with the continued growth of Inverness as the Highland capital.

Cumulative Development 2003-2015

2.4.7 Between 2003 and 2015 there has been considerable development along the Scottish Canal network:

- Over 5,400 new homes have been constructed.
- Total investment is c.£878m.
- Significant employment opportunities (c. 5,000 jobs) have been provided. Some 179,000 sq.m of employment floorspace has been developed.
- Related construction activity has generated over 4,700 construction jobs.

2.4.8 Overall the amount of housing investment and development along the Scottish canal network has exceeded trends recorded at the wider local authority/national level. The growth in employment floorspace and resultant jobs created along the canal network has been generally consistent with national trends.

---

9 http://www.gov.scot/Topics/Statistics/Browse/Housing-Regeneration/HSfS/NewBuildAllSector
10 http://www.gov.scot/Topics/Statistics/Browse/Housing-Regeneration/HSfS/NewBuildSummary

3 Assessment of Canal Side Activity

3.1.1 This chapter looks at the economic impact of canal side activity i.e. visitors numbers attracted and associated spend.

3.2 Overview

3.2.1 There has been significant recent towpath investment along the Lowland Canal network. 25.5km of footpaths have been upgraded, with £4.4m being raised for these works. A further £2.5m of work is still remaining to be completed, including sea to sea and city to city paths. It is planned to have these completed by Scottish Canals 250-year anniversary by 2018.

3.2.2 Information from Scottish Canals suggests the wider canal network supports over 120 events annually, bringing in over 60,000 people. Scottish Canal figures suggest that the economic value of £830,000 from events on the path network.

3.2.3 The following section looks at the impact of land visitors and canal users in terms of visits and spend received.

3.3 Lowland Canal Network

Land based activity

3.3.1 Research by Sustrans and Scottish Canals provides an indication of visitor numbers and spend to key locations along the Lowland Canal Network.

Falkirk (Falkirk Wheel)

3.3.2 Information from the Moffat Centre estimated 605,432 trips to the Falkirk Wheel in 2015. Visitors numbers to the Falkirk Wheel have increased since 2008 (27%) when 476,778 annual trips were recorded. Sustrans survey data indicates that the vast majority (95%) of visits to the Falkirk Wheel are leisure based as opposed to commuting trips.

3.3.3 Between 2014/15 trips to The Helix totalled 952,506\(^1\). In line with trips to the Falkirk Wheel it is assumed that the vast majority (75%) of these visits would be leisure based.

3.3.4 Information from Scottish Canals indicates that on average visitors to the canal network spend £30.50 per visit. Total combined visitor spend is estimated at £29.3m\(^2\). This amount of spend supports 544 tourism-related jobs and £12.0m in associated GVA.

Glasgow (Stockfield Junction)

3.3.5 Sustrans estimated 195,171 trips were made to Stockfield Junction in 2015. 69% of these trips were leisure related (134,668). Trips to the area have increased significantly since 2008 (388%), when only just over 40,000 were recorded.

3.3.6 Assumed spend per leisure is estimated at £30.50 (as above), which gives a total leisure spend figure of £4.0m. This supports an additional 76 tourism-related jobs and £1.6m in GVA.

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\(^1\) Falkirk Community Trust Annual Report 2014-2015

\(^2\) Assuming that 25% of visits would visit both the Falkirk Wheel and Helix on the same trip
Edinburgh (Union Canal)

3.3.7 In 2015, Scottish Canal estimated that around 700,000 people visited the Edinburgh canal. This is a significant increase in visits compared to the 2010 figures where 475,707 visits were recorded.

3.3.8 According to previous Sustrans survey work, only around half of canal visits to Edinburgh were leisure related. Over 40% were commuter’s. A similar proportion of leisure visitors have been assumed for this assessment.

3.3.9 It is estimated that c. 345,000 leisure visits were to the Edinburgh canal network in 2015. The level of expenditure is estimated at £10.4m\(^{13}\). This supports 194 tourism-related jobs, equating to £4.3m in GVA.

Water based Activity

3.3.10 Scottish Canal figures show that in total 41,548 licenses were purchased (11,816 transit/short term licenses, 29,732 long term licenses). In total, taking into account mooring fees and commercial income, total boating income was £254,730.

3.3.11 Scottish Canal figures suggest that the Lowland transit market is small, with 80 full transits taking place annually. Assuming a 5 day trip and that each transit spends £87 per day locally per trip\(^{14}\), then this would equate to £34,892 in visitor spend at locations along the canal network. This would support 0.6 direct jobs and 0.2 induced jobs, as well as c.£26,000 in GVA.

Health Impact Analysis

3.3.12 Canal usage provides positive health and wellbeing benefits that can be measured and quantified. Health benefits from 2012-2016 have been monetised using a consistent approach to that used in the 2011 Scottish Canals Monitoring Report.\(^{15}\) The approach is based on a recognised methodology using canal pedestrian counters and canal user survey information to establish additional exercise generated by the canal network.

Pedestrian Counts

3.3.13 Table 3.1 shows the number of annual pedestrian counts from 2012-2016 along the lowland canal network. These figures have been adjusted using canal user survey information\(^{16}\) to estimate the number of ‘additional’ cycling, running and walking trips.\(^{17}\) This method allowed for the calculation of total additional person kilometres. The canal network delivered around 5million ‘additional’ person kilometres per year from 2012-2016.

<table>
<thead>
<tr>
<th>Year</th>
<th>Annual Pedestrian Count Total</th>
<th>Total ‘Additional’ Person Kilometres</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>1,401,370</td>
<td>4,676,476</td>
</tr>
<tr>
<td>2015</td>
<td>1,594,001</td>
<td>5,252,871</td>
</tr>
</tbody>
</table>

\(^{13}\) Assuming an average spend of £30.50 per trip  
\(^{14}\) Visit Scotland  
\(^{15}\) ‘Positively Affecting Lives: The Health Benefits of the Forth & Clyde and Union Canals’ report (June 2011)  
\(^{16}\) Consistent with 2011 methodology  
\(^{17}\) ‘Additional’ exercise is defined as activity which the user would not have otherwise undertaken. The benefit cannot be classed as ‘additional’ where the user has simply transferred mode, for example, from walking to cycling.
### Yearly Pedestrian Count and Total ‘Additional’ Person Kilometres

<table>
<thead>
<tr>
<th>Year</th>
<th>Annual Pedestrian Count Total</th>
<th>Total ‘Additional’ Person Kilometres</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>1,629,349</td>
<td>4,807,802</td>
</tr>
<tr>
<td>2013</td>
<td>1,846,557</td>
<td>5,805,993</td>
</tr>
<tr>
<td>2012</td>
<td>1,662,126</td>
<td>4,622,526</td>
</tr>
<tr>
<td>2012-2016 average</td>
<td>1,626,680</td>
<td>5,033,134</td>
</tr>
</tbody>
</table>

### Monetising the Impacts

3.3.14 The World Health Organisation’s (WHO) Heath Economic Assessment Tool (HEAT) was then used to monetise the health benefits of cycling and walking and reduced mortality rates.18

3.3.15 Average total monetised benefit associated with additional exercise along the lowland canal network is £11.5m per annum. This is 80% higher than the estimated value in 2010.

#### Table 3.2: Total Monetised Benefit of ‘Additional’ Exercise Generated by the Canals

<table>
<thead>
<tr>
<th>Mode</th>
<th>Total Monetised Benefit (£)</th>
<th>% of 2010 Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>£10,756,263</td>
<td>169%</td>
</tr>
<tr>
<td>2015</td>
<td>£11,974,465</td>
<td>188%</td>
</tr>
<tr>
<td>2014</td>
<td>£11,015,429</td>
<td>173%</td>
</tr>
<tr>
<td>2013</td>
<td>£12,987,865</td>
<td>204%</td>
</tr>
<tr>
<td>2012</td>
<td>£10,735,659</td>
<td>168%</td>
</tr>
<tr>
<td>2012-2016 average</td>
<td>£11,494,910</td>
<td>180%</td>
</tr>
<tr>
<td>2010</td>
<td>£6,371,675</td>
<td>100%</td>
</tr>
</tbody>
</table>

### 3.4 Highland Canal Network

#### Land based activity

3.4.1 Research by Scottish Canals has indicated that users of the Great Glen Way contributed approximately £6.5 million per annum to the local economy in 2012. As towpaths along the Caledonian Canal make up approximately a third of the Great Glen Way, a proportion of this expenditure is attributable to the Canal.

3.4.2 According to 2014 Great Glen Way counter data, the Great Glen Way attracted around 24,000 long distance walkers and nearly 20,000 day walkers along the Caledonian Canal section of the route. Long distance walkers spend approximately £228 per trip, whereas day walkers are assumed to spend £15 per day. It is assumed that approximately £5.9m is spent by walkers using the Great Glen Way. Expenditure of this magnitude would support 109 direct jobs and a further 32 indirect/induced jobs. This equates to £4.8m in GVA.

3.4.3 In addition, it is estimated that the Great Glen Way also attracts some 7,000 whole route cyclists, with a further 5,000 day cyclists annually. Average spend is assumed to be £97 per day for overnight cyclists (according to VisitScotland data) and £5 per day for day cyclists.

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18 It is worth noting that the HEAT tool does not provide an economic assessment of the benefits of running and therefore this has been calculated by comparing the approximate calories burned with cycling.
Assuming a 3 night trip, cyclists spend an estimated £2.0m along the Great Glen Way. This would support 38 direct jobs and a further 11 indirect/induced jobs, generating an estimated £1.6m in GVA. Assuming that around a third of benefit can be attributed to the stretch of the route along the Canal, this would equate to approximately 13 direct jobs, 4 indirect/induced jobs and an estimated £0.53m in GVA. It is likely that this figure is higher given the attractive quality of the Canal as a tourism and recreation destination.

3.4.4 Visitors to the Caledonian Centre have been consistently between 25,000 and 30,000 since 2006. In 2012, the Centre took c.£25,000 in takings.

Water Based

3.4.6 The Great Glen Canoe Trail (GGCT), Scotland’s first formal canoe trail, also uses part of part of the Caledonian Canal. The number of GGCT paddlers increased by 64% between 2011 and 2015. According to figures provided by Scottish Canals, total paddlers in 2015 were 1,934. It assumed that on average paddlers spend approximately £32 per day. Assuming a 3 day trip, the GGCT is generating around £0.18 million per annum, which supports 3 direct jobs and 1 direct/indirect jobs. £0.15 million in GVA is generated using Highland region GVA figures produced by the Scottish Government.

3.4.7 Scottish Canals supports the operation of a fleet of around 64 hire boats based on the Caledonian Canal. Research undertaken by VisitScotland found that the average hire boaters spend approximately £50 per day locally. Assuming that each hire boat is leased for five days, this would create a direct local spend of around £0.298 per annum. This supports 6 direct jobs and a further 2 indirect/induced jobs. These jobs generate £0.24m in GVA.

3.4.8 As well as the hire boat fleet, Scottish Canals operates hotel boats; trip boats; one bistro boat; and one bunk house boat. Each of these vessels generate tourist visits / bed nights and income, although the extent of this has not been quantified. An inventory of the companies operating on the Caledonian Canal is shown below:

- **Hire Fleets**
  - Caley Cruisers - 25 boats (2015)
  - West Highland Sailing – 16 boats (2014)
  - Le Boat – 17 boats (2014)
  - Free Spirit Boat Hire – 6 boats

- **Hotel Boats**
  - Scottish Highland Cruising – 1 boat
  - Caledonian Discovery – 2 boats
  - Magna Carter – 2 boats

- **Bistro / Bunkhouse**
  - Eagle – 1 boat
  - Lady Andorina – 1 boat

- **Trip Boats**
  - Jacobite Cruises – 3 boats
  - Cruise Loch Ness – 3 boats, 2 RIBS
  - Clyde Marine Services Ltd – 1 boat
Transit Boats

3.4.9 Total boating income received from the Caledonian and Crinan Canals in 2015 was £1.0m. Income received from transient licenses on the Caledonian Canal has steadily increased by 36% between 2011 and 2015, increasing from £188,292 in 2011 to £255,271 in 2015. Conversely the number of licenses purchased has by decreased by 9% since 2013.

3.4.10 It is estimated that the average transit boat user spends approximately £87 per day locally. It is estimated that there were 2,500 transits per annum on the Caledonian and Crinan Canals in total. Assuming a four day trip per transit, this equates to a total figure of £872,300 per annum for all transit boat users. This amount of expenditure supports 16 direct jobs and a further 5 indirect/induced jobs. These jobs generate £0.661m in GVA.
4 Deprivation Analysis

4.1 Overall SIMD change

4.1.1 An analysis has been carried out to determine the how the levels of deprivation have changed across the entire Scottish canal network between 2004 and 2016. Table 2.1 displays the breakdown of data zones within a 1km buffer of the entire canal network and their respective categorisation:\[19\]:

Table 2.1 Deprivation across Canal Network

<table>
<thead>
<tr>
<th>Category</th>
<th>2004 SIMD No. of Data Zones</th>
<th>%</th>
<th>2012 SIMD No. of Data Zones</th>
<th>%</th>
<th>2016 SIMD No. of Data Zones</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>248</td>
<td>33.0%</td>
<td>225</td>
<td>30.0%</td>
<td>225</td>
<td>28.4%</td>
</tr>
<tr>
<td>2</td>
<td>170</td>
<td>22.6%</td>
<td>182</td>
<td>24.2%</td>
<td>211</td>
<td>26.7%</td>
</tr>
<tr>
<td>3</td>
<td>141</td>
<td>18.8%</td>
<td>143</td>
<td>19.0%</td>
<td>154</td>
<td>19.5%</td>
</tr>
<tr>
<td>4</td>
<td>192</td>
<td>25.6%</td>
<td>201</td>
<td>26.8%</td>
<td>201</td>
<td>25.4%</td>
</tr>
<tr>
<td>Total</td>
<td>751</td>
<td>100%</td>
<td>751</td>
<td>100%</td>
<td>791</td>
<td>100%</td>
</tr>
</tbody>
</table>

4.1.2 Between 2004 and 2016 there has been a slight reduction in the proportion of data zones classed as being in the 25% most deprived communities in Scotland. This indicates a potential trend towards a reduction in deprivation along the canal network. However, in order to gain a better understanding of the potential reduction in deprivation, more detailed analysis is required at key nodal points along the canal network, where there has been significant investment.

4.1.3 The following sections analyse change in deprivation recorded at Glasgow, Falkirk and Edinburgh.

4.2 Glasgow

4.2.1 The Figures below show the level of deprivation recorded in canal data zones around the Glasgow branch of the Forth & Clyde Canal in 2004, 2012 and 2016:

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\[19\] Category 1: Data zones ranked as being within the 25% most deprived, Category 2: Data zones within the 25%-50% deprivation ranking, Category 3: Data zones within the 50%-75% deprivation ranking, Category 4: Data zones within the 75%-100% deprivation ranking
Scottish Canals

Scottish Canals Monitoring Report 2016

Figure 2.1 2004 Glasgow Canal Deprivation Map

Figure 2.2 2012 Glasgow Canal Deprivation Map

Figure 2.3 2016 Glasgow Canal Deprivation Map
4.2.2 Table 2.2 below provides a breakdown of the deprivation figures:

Table 2.2 Deprivation across Glasgow Canal Network

<table>
<thead>
<tr>
<th>Category</th>
<th>2004 SIMD No. of Data Zones</th>
<th>%</th>
<th>2012 SIMD No. of Data Zones</th>
<th>%</th>
<th>2016 SIMD No. of Data Zones</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>32</td>
<td>59.3%</td>
<td>25</td>
<td>46.3%</td>
<td>24</td>
<td>42.9%</td>
</tr>
<tr>
<td>2</td>
<td>12</td>
<td>22.2%</td>
<td>11</td>
<td>20.4%</td>
<td>11</td>
<td>19.6%</td>
</tr>
<tr>
<td>3</td>
<td>9</td>
<td>16.7%</td>
<td>10</td>
<td>18.5%</td>
<td>12</td>
<td>21.4%</td>
</tr>
<tr>
<td>4</td>
<td>1</td>
<td>1.9%</td>
<td>8</td>
<td>14.8%</td>
<td>9</td>
<td>16.1%</td>
</tr>
<tr>
<td>Total</td>
<td>54</td>
<td>100%</td>
<td>54</td>
<td>100%</td>
<td>56</td>
<td>100%</td>
</tr>
</tbody>
</table>

4.2.3 Whilst there are still a high proportion of deprived zones within the canal network\(^\text{20}\), there are definite signs of recovery. The proportion of the data zones around the Glasgow canal network within the 25% most deprived communities in Scotland has fallen significantly from 59% in 2004 to 43% in 2016.

4.2.4 At the wider Glasgow level, the proportion of its data zones within the 25% most deprived has fallen from 63% in 2004 to 54% in 2016. This shows that proportionally the reduction in deprivation has been greater along the canal network compared to the wider local authority area.

4.2.5 Along the canal network a number of zones in Woodside and Port Dundas areas have improved significantly. For example, the Port Dundas data zone has gone from being within Category 1 in 2004 to Category 4 in 2016. The 2016 SIMD results show that this data zone scores well in terms of employment and health deprivation.

4.2.6 This highlights the positive effects of the considerable regeneration initiatives and projects which have come forward along the Glasgow canal network. In total between 2010 and 2015 around £72.4m of investment has taken place. Examples include the restoration of the Whisky Bond and Glue Factory and also the creation of the Pinkston Watersports facility in Port Dundas which includes a community paddlesports centre with opportunities for rafting, river boarding, kayaking, canoeing and outdoor swimming. Canalside locations such as Netherton, Maryhill, Firhill and Sighthill have also experienced increases in residential development. This includes the construction of 141 new homes in Sighthill, (part of the wider £250m masterplan regeneration of the area). This investment has helped enhance the deprivation profile around the Glasgow canal network.

4.3 Falkirk

4.3.1 The Figures below shows the level of deprivation recorded at the data zones within a 1km corridor around the Falkirk area in 2004, 2012 and 2016:

\(^{20}\) As defined in Figures 2.1 - 2.3
4.3.2 Table 2.3 below provides a breakdown of the Falkirk deprivation figures:

Table 2.3 Deprivation across Falkirk Canal Network.

<table>
<thead>
<tr>
<th>Category</th>
<th>2004 SIMD No. of Data Zones</th>
<th>%</th>
<th>2012 SIMD No. of Data Zones</th>
<th>%</th>
<th>2016 SIMD No. of Data Zones</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>22</td>
<td>36.7%</td>
<td>17</td>
<td>28.3%</td>
<td>20</td>
<td>30.3%</td>
</tr>
<tr>
<td>2</td>
<td>15</td>
<td>25.0%</td>
<td>19</td>
<td>31.7%</td>
<td>22</td>
<td>33.3%</td>
</tr>
<tr>
<td>3</td>
<td>10</td>
<td>16.7%</td>
<td>10</td>
<td>16.7%</td>
<td>9</td>
<td>13.6%</td>
</tr>
<tr>
<td>4</td>
<td>13</td>
<td>21.7%</td>
<td>14</td>
<td>23.3%</td>
<td>15</td>
<td>22.7%</td>
</tr>
<tr>
<td>Total</td>
<td>60</td>
<td>100%</td>
<td>60</td>
<td>100%</td>
<td>66</td>
<td>100%</td>
</tr>
</tbody>
</table>

4.3.3 Significant investment along the canal network has helped reduce severe deprivation. The proportion of data zones along the Falkirk canal network within the 25% most deprived in Scotland has reduced from 36.7% in 2004 to 30.3% in 2016. In comparison at the wider Falkirk Council level, the proportion has reduced from 25% in 2004 to 22% in 2016. Again a greater proportional change in deprivation reduction has occurred along the canal network as opposed to the wider local authority area.

4.3.4 There is still scope to reduce deprivation around the Falkirk canal network further as there been a proportional increase in data zones within the 25-50% most deprived between 2004 and 2016.

4.3.5 Significant investment and regeneration has already taken place. Between 2010 and 2015 there has been over £55m invested around the Falkirk canal network. The major regeneration project along the Falkirk canal network has been the creation of The Helix. This c.£45m development (including the Kelpies sculptures, the creation of a Canal Hub and the construction of a canal extension) only opened in 2013. As a result, it will take time before the health deprivation benefits are realised fully in the local area. In 2014 this canal-related development received over 800,000 visitors making it one of the most popular visitor attractions in Scotland. It is highly likely that a significant proportion of the visits were day visits from people outside the Falkirk area from locations such as Glasgow and Edinburgh. As a result, a number of health deprivation benefits will not be recorded necessary around the Falkirk conurbation. Instead the reduction in deprivation will be experienced elsewhere across the country.

4.3.6 The canal is also acting as a catalyst for development in the Falkirk area. For example, marketing material for the Redding Bank housing development (343 homes) highlights canal proximity as a key benefit and selling point.

4.3.7 Initiatives such as OutdoorTrax (an organisation which promotes outdoor activities along the canal network) are encouraging people to cycle, paddle and kayak along the canal in the Falkirk area. The continuation of such schemes should help reduce health deprivation in the future.

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21 As defined in Figures 2.4-2.6
4.4 Edinburgh

4.4.1 The Figures below shows the level of deprivation recorded at the data zones within a 1km corridor around the Edinburgh area in 2004, 2012 and 2016:
Figure 2.7 2004 Edinburgh Canal Deprivation Map

Figure 2.8 2012 Edinburgh Canal Deprivation Map

Figure 2.9 2016 Edinburgh Canal Deprivation Map
4.4.2 Table 2.4 below provides a breakdown of the Edinburgh deprivation figures:

<table>
<thead>
<tr>
<th>Category</th>
<th>2004 SIMD No. of Data Zones</th>
<th>%</th>
<th>2012 SIMD No. of Data Zones</th>
<th>%</th>
<th>2016 SIMD No. of Data Zones</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1</td>
<td>1.8%</td>
<td>0</td>
<td>0.0%</td>
<td>1</td>
<td>1.8%</td>
</tr>
<tr>
<td>2</td>
<td>18</td>
<td>32.1%</td>
<td>10</td>
<td>17.9%</td>
<td>8</td>
<td>14.0%</td>
</tr>
<tr>
<td>3</td>
<td>10</td>
<td>17.9%</td>
<td>13</td>
<td>23.2%</td>
<td>16</td>
<td>28.1%</td>
</tr>
<tr>
<td>4</td>
<td>27</td>
<td>48.2%</td>
<td>33</td>
<td>58.9%</td>
<td>32</td>
<td>56.1%</td>
</tr>
<tr>
<td>Total</td>
<td>56</td>
<td>100%</td>
<td>56</td>
<td>100%</td>
<td>57</td>
<td>100%</td>
</tr>
</tbody>
</table>

4.4.3 Overall the levels of severe deprivation are minimal along the Edinburgh canal network. The proportion of data zones that are within Category 2 have fallen significantly from 32% in 2004 to 14% in 2016. The levels of deprivation are much higher at the wider Council area. In 2004 18% of Edinburgh’s data zones were in the 25% most deprived in Scotland. This figure has since reduced to 17% in 2016. The proportion of data zones within Category 2 has increased from 16% in 2004 to 18% in 2016. This highlights again that significant investment and regeneration along the canal network has reduced deprivation significantly.

4.4.4 There has been significant investment around the canal network in Edinburgh between 2010 and 2015, totalling £219.1m. This includes significant housing development in areas such as Ratho, Fountainbridge, Edinburgh West End and Wester Hailes. Proximity to the Union Canal is commonly used as a selling point in marketing brochures. This highlights that the canal is helping to maintain a low level of housing deprivation along the canal buffer.

4.4.5 There has also been considerable employment floorspace created around the canal network between 2010 and 2015 (35,156 sq.m) which equates to around c.1,100 jobs. This significant level of investment has also helped keep income and employment deprivation down in the area.

4.4.6 There are also a number of initiatives which potentially have led to reductions in health deprivation. Examples include the Fountainbridge Canalside Initiative which runs a series of events, such as a Canal Festival, which encourage people to interact with the canal network in a positive way.

4.5 Qualitative assessment

4.5.1 The above analysis has shown that deprivation levels have generally fallen around the canal network between 2004 and 2016. This is a result of a sustained investment programme from Scottish Canals and its partners. This investment has acted as a catalyst for other development e.g. housing development is coming forward to take advantage of canalside locations.

4.5.2 Whilst there are pockets of severe deprivation along the canal network, these can be attributed to wider socio-economic issues. For example, while the canal network may provide

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22 As defined in Figures 2.7-2.9
opportunities for recreation, if residents of an area are income deprived then they may not be able to utilise the canal to its fullest extent. However, continued investment along the canal network, creating homes and jobs, will help to alleviate this in the future.

4.5.3 The benefits of the canal network are not exclusive to areas in proximity of the canal. As stated above, a significant proportion of visitors to the canal network may not live within proximity of it. Day visitors to the canals may experience positive health benefits; however, this reduction in health deprivation will be recorded outside the 1km canal buffer used in this assessment.

4.6 Conclusions

4.6.1 The following reductions in deprivation were recorded around key nodal points along the canal network:

- Glasgow: 17% reduction in the proportion of data zones along the Glasgow Canal network in the most deprived 25% in Scotland between 2004 and 2016. In comparison, the Glasgow Council area experienced a 9% reduction over the same period;

- Falkirk: Canalside communities in Falkirk saw a 6% reduction in the proportion of data zones in the 25% most deprived in Scotland between 2004 and 2016. There was a 3% reduction across the Council area

- Edinburgh: In 2016 only 1 canalside data zone is in the 25% most deprived (1.8%), although across the Edinburgh Council area 17% of data zones are in this category. There has been a proportional decrease (18%) in data zones within the 25-50% most deprived in canalside locations between 2004 and 2016, although Edinburgh as a whole has experienced an increase (2%).

4.6.2 The changes noted in the SIMD indices clearly demonstrate a positive correlation between investment in the canal network and reductions in deprivation. Some of the most pronounced falls along the canal network have been seen in locations formerly among the most deprived. As shown above, a number of areas around the Glasgow canal network have experienced significant reductions in deprivation. Areas of Port Dundas, which have benefitted from significant investment, are now within the 25% least deprived in Scotland. Previously the whole area was classed as being in the 25% most deprived.
5 Case Studies

5.1.1 Case studies summarise activity around key nodal points along the canal network since 2010.

5.2 Bowling Basin

5.2.1 As part of the ongoing regeneration of the canal network, there has been significant multi-phased regeneration at Bowling Basin (pictured).

5.2.2 Scottish Canals, West Dunbartonshire Council and their regeneration partners aim to exploit Bowling Basin’s tourism and leisure potential and transform it into a ‘destination worthy of the strategic position that it occupies within the canal network.’ The ultimate goal is to create an area where there are opportunities for retail, commercial and leisure development at the western gateway to the Forth and Clyde Canal. It is also hoped that the regeneration of the harbour area will act as a catalyst for further development in the wider Bowling area.

5.2.3 To further this aspiration Scottish Canals applied for funding from the Coastal Communities Fund (CCF) in September 2014 to create business space and deliver public realm improvements at Bowling Basin. The project was awarded £782,413 from CCF in January 201523, to be used to:

- Transform disused railway arches to create workspace / business units (£465,227). The disused railway arches have been transformed to create 5 new workspace/business units. Current occupiers include Magic Cycle, Paton Parcels and the Dug Café; and

- Integrate a package of public realm works (£317,186), including enhanced visitor access, new toilet facilities, landscaping and introducing a woodland picnic area.

5.2.4 A further £100,000 was attributed to the project in 2016 for the creation of an outdoor activity hub.

5.2.5 A number of positive economic impacts were derived during the restoration process. These include supporting 18 construction jobs and it is envisaged that the once full let the development could support 14 direct jobs and 11 indirect jobs. It is also predicted that the restoration will attract over 100,000 in new visitors to the area.

5.2.6 A wide range of community projects took place at Bowling Basin over the last couple of years. These have been led by the Clipperton Project and Scottish Waterways Trust.

5.2.7 The Clipperton Project is a non-profit group which focuses on encouraging people to engage with the spaces around them. Activities are organised nationwide however the group has a particular focus on the communities in and around Bowling Basin. The Clipperton Project has

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23 The award was the fund's single largest award in 2015 (https://www.west-dunbarton.gov.uk/council/newsroom/news-and-press-releases/2015/january/regeneration-of-bowling-basin-awarded-780-000-coastal-communities-funding/)
carried out a range of projects over the last year including family events and engagement with local schools. This has supported a range of volunteer and paid opportunities.

5.2.8 Scottish Waterways Trust has carried out guided tours of the historic features of the Bowling Basin area with primary school pupils, as well as co-ordinating volunteers to make improvements to public areas around Bowling.

5.3 Glasgow

5.3.1 A series of regeneration projects have taken place along the Glasgow canal network since 2010. An overview of work by area is provided below:

Speirs Locks

5.3.2 Significant regeneration has taken place at Speirs Locks (pictured) on back of an award winning masterplan. The derelict 14-hectare site has been transformed into a vibrant centre for creative industries. The Speirs Locks initiative was instigated by the Glasgow Canal Regeneration Partnership (GCRP), a partnership between Glasgow City Council and ISIS Waterside Regeneration, supported by Scottish Canals.

5.3.3 Regeneration projects at Speirs Locks include the restoration of the Whisky Bond in 2012 turning it into a creative factory. The building provides 7 floors of creative workspace, studios and offices. It is home to the Glasgow Sculpture Studios and is marketed as “a hive of creativity and productivity”.

5.3.4 The regeneration of the Glue Factory in 2010 has provided a new creative venue as part of the canal network. Located within the building is Gallery 47, which is an innovative arts programme designed to help young people develop confidence, citizenship and entrepreneurial skills.

5.3.5 A number of creative organisations have a presence at Speirs Locks including the National Theatre for Scotland, Scottish Opera, the GAMTA Theatre Company and the Royal Conservatoire of Scotland has set up a £6m campus on site. The first phase of a £40m student campus has also been completed at the site.

5.3.6 Scottish Canals have invested heavily into the area including a £6.2 million project which has seen the creation of 300 metres of new canal, a mooring basin and two lock structures between Speirs Wharf and Pinkston Basin in Port Dundas. There has also been the construction of a new footbridge which was designed to improve pedestrian and cycle access throughout the area.

5.3.7 Significant public realm improvements have also taken place including the creation of the Phoenix Flowers, a £3.5m restoration project which includes 50 giant aluminium flowers, which creates a link between the city centre and Glasgow’s Canal.
Port Dundas

5.3.8 In Port Dundas there has also been significant regeneration projects completed along with a number of plans for the future.

5.3.9 A key development has been the creation of the Pinkston Watersports Centre (pictured). This £2m development was driven by the Glasgow Canal Regeneration Partnership (Glasgow City Council, Scottish Canals and ISIS Waterside Regeneration). It includes a community paddlesports centre with opportunities for rafting, river boarding, kayaking, canoeing and outdoor swimming. 25,000 visitors are expected to use the centre in 2016.

5.3.10 Future plans for the area include the desire to create a new city quarter, attracting people and investment to the area.

5.3.11 Grant funding for a £11.6m scheme which will control flooding along both sides of the Forth and Clyde canal to the north of the city centre has been approved by Glasgow City Council. These grant agreements – along with Scottish Canals and BIGG Regeneration - will help deliver the funding for the next stages of a surface water management programme that will enable land near the canal to be regenerated.

5.3.12 As part of the scheme Glasgow City Council recently approved £5.67m of City Deal grant funding to regenerate the 100 Acre Hill Site in Port Dundas. The funding will be used to progress site remediation and will enable an access and infrastructure programme to facilitate development of the vacant site (formerly a distillery) whilst also allowing a business case and detailed designs to be drawn up. The site has capacity for 500 homes and 6,000 sq.m of commercial space. It is envisaged that the development of the site will enhance connections between the city centre, Sighthill and Possilpark.

Maryhill Locks

5.3.13 The area around Maryhill Locks has seen significant housing regeneration, with particular focus on providing affordable housing provision. The long term vision is to provide 400 new homes, 300 for owner occupiers and 100 for tenants.

5.3.14 So far three phases of the Maryhill Locks Transformational Regeneration Area (TRA) has been completed, totalling 200 homes. Phases 1 (35 new homes) and 2 (125 new homes) were delivered by the Maryhill Housing Association. Phase 3 has recently been completed by developer Bigg Regeneration (a partnership between Scottish Canals and the Igloo Regeneration Fund) and comprises of 40 homes on the site at ‘Whitelaw Street, Maryhill Locks’ (pictured). One of the key features of the development is its waterside location.

5.3.15 These new housing development complement other significant regeneration activities which have taken place in Maryhill area, including the restoration of Maryhill Burgh Halls and the leisure centre as well as the creation of the new Maryhill Health & Care Centre.

Other development

5.3.16 Recently work has been completed in East Dunbartonshire in respect of a new stretch of upgraded towpath. The new stretch, which extends to over three kilometres, connects the communities of Twechar and Auchindavie, and forms part of the 35-mile towpath stretching the length of the Forth & Clyde Canal. Funding for the £247,000 towpath was provided by Sustrans, East Dunbartonshire Council and WREN (Waste Recycling Environmental Limited).

5.4 Falkirk Helix

5.4.1 The key canal-related regeneration project in Falkirk has been the opening of The Helix (pictured). The £43m regeneration project has transformed 350 hectares of land between Falkirk and Grangemouth and now connects 16 local communities through extensive path networks. It is a popular destination for visitors seeking outdoor activities.

5.4.2 Key achievements so far include:

- The Kelpies: 30 metre horse head sculptures next to the Forth and Clyde Canal;
- 1km of new canal with towpaths;
- 27km of shared access, high quality pathways;
- A new lagoon in Helix Park;
- A new splash play area;
- An Adventure Play Zone and Splash Play area;
- The new Plaza Café;
- Sustainable LED lighting for at least 14 km of these new pathways;
- Two new toucan road crossings and a new road underbridge;
- A new wetland boardwalk;
- Over 120 trained Nordic Walkers & over 30 trained walk leaders;
- 25 direct training places in woodland management as well as hundreds of ongoing volunteer opportunities;
- A canal tunnel under the M9 motorway;
- Two new pieces of public art and the refurbishment of two existing pieces;
- Multiple jobs and contracts for local and national companies during construction;
- Development of a 16-mile cycle route connecting The Helix, The Kelpies, The Falkirk Wheel and Callendar House; and
- Multiple community projects, including a new beekeeping society (Helix Beekeepers), Meet The Species events, The Abbotshaugh Sentinel project.

5.4.3 Since the opening of The Helix, wider visitor numbers to Falkirk have increased significantly. Visitor numbers in Falkirk increased by 41% between 2009 and 2015\(^{25}\). Between 2014 and 2015 day visitors increased by 18.9% in Falkirk while Scotland as a whole experienced a decline in day visitors. At the same time there has also been an increase in the number of visitors to Falkirk staying in paid accommodation with a 3.6% increase in those staying in serviced accommodation. This performance is largely attributable to the development and opening of The Helix.

5.5 **Edinburgh – Fountainbridge**

5.5.1 Considerable regeneration has taken place in the Fountainbridge area of Edinburgh, including the creation of commercial, hotel, leisure, residential and retail space. Example of development include a new Mercure Hotel on Gardners Crescent.

5.5.2 There are plans for considerable future investment in the area. This includes the proposed £200m India Quay development which aims to create 438 new homes as part of the long-term redevelopment of the former McEwen’s brewery site. It is envisaged that the proposals will create a civic opportunity to introduce significant new public space which positively engage with the canal environment.

5.5.3 Other potential development in the pipeline includes the proposed £35 million waterside Urban Villa hotel located by the Union Canal Basin. The 180-room hotel on Freer Street has been designed by New York-based architect Grzywinski + Pons along with Edinburgh-based Michael Laird Architects.

\(^{25}\) Business Falkirk Series 3, Issue 11, November 2016
6 Summary

6.1.1 The economic benefit of maintenance and development of the canal network across Scotland is clear:

- Housing development in areas along the Scottish Canal’s network is increasing, despite lower levels of activity at wider local authority and national level. Developers are keen to take advantage of canalside locations to maximise the value of their developments.

- The amount of related construction investment and employment is also increasing, highlighting the canal corridor’s robustness during the recent economic downturn and its appeal as a place to invest in new homes and jobs.

6.1.2 There is also a positive correlation between investment in the canal network and reductions in deprivation. Reductions in deprivation can be attributed in part to the regeneration of the canal network. Canalside locations have seen reductions in various measures of deprivation such as income, employment, health, and housing deprivation. The canal network assists this through:

- Creating positive socio-economic impacts such as promoting a healthier lifestyle;

- Encouraging investment (such as housing and commercial development) and creating jobs across the canal network;

- Improving engagement with local communities;

- Enhancing the walking and cycling network;

- Enhancing the quality of life for local residents and making areas more attractive; and

- Creating a tourism focus on the waterfront.