Antonine Wall Socio-Economic Impact Study

Final Report

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Contents

Executive Summary

Brookdale Consulting was commissioned by the partners to the Antonine Wall to undertake a Socio-Economic Impact study of the Antonine Wall (the Wall)[1].

A robust evidence gathering process was undertaken to support the modelling of Antonine Wall impacts. This included mapping of the economic and demographic characteristics of the Wall; reviewing best practice at other world heritage sites; extensive stakeholder consultations; and a survey of over 60 businesses.

The work took place between October 2014 and March 2015

The key findings around the people and economy of the Wall[2] are:

- 80,000 people living in 34,800 households
- 3,300 mostly small businesses employing 32,500 people
- 5% of these people are amongst the 10% most deprived in Scotland – with several other areas of high deprivation close to the Wall
- Manufacturing and wholesale/retail are the largest sectors, together employing almost 10,000 people
- Unemployment is similar to the rest of Scotland
- 13% of people are income deprived and 12% of working people are employment deprived
- Tourism accounts for 3,100 jobs
- 22 limited companies already use the 'Antonine' name in their branding.

The key findings of the review of best practice are:

- Signage is vital from motorway right down to the car park – as is managing expectations of what there is to see on-site
- A suitable long term sustainable funding model for management is required
- A Trust can be a useful mechanism for fund raising in the right context
- Good quality consistent interpretation and ideally an interpretation centre – though this is costly and may be a long term objective
- Involve local communities as much as possible with good communication
- Manage expectations of stakeholders by setting realistic goals and reporting back on achievements - this will help maintain enthusiasm
- Demonstrating strong partnership in this way is vital for funder/investor support
- Harnessing local community volunteers could generate substantial added value
- Develop a strategic relationship with HLF so that projects across the area are promoted coherently and with appropriate linkages
- Find alternative ways of visualising the Wall such as using digital technology

[1] The partners are Historic Scotland, Falkirk Council, North Lanarkshire Council, East Dunbartonshire Council, Glasgow Council and West Dunbartonshire Council.
[2] Defined as the Wall and its buffer zone.

- Encourage joint funding bids from right across Europe and increased exchange of ideas and people.

The business survey highlights are:

- 61 businesses completed the survey
- Most were small businesses located on or near the Wall
- Nearly half (45%) currently have activities associated with the Wall; however for all but one, this generates only 0-5% of their business turnover
- Over 80% of those surveyed were interested in the potential to generate new business activity from the Wall.

The economic modelling highlights are:

- The economic value of current activities related to the Antonine Wall is around £2m per year comprising museums, greenspace value, partner contributions and visitors to sites
- The actual baseline economic impact of the Antonine Wall, shows that current annual input costs of £632k generate annual benefits of £3m when direct, indirect and induced effects are included
- Forecast future impacts assume a long distance Antonine Wall walk is developed leading to increased overnight visitors and more tours are run at various sites. An additional PhD is assumed in research. Partner contributions are assumed to stay the same
- Future impacts estimate that the impact of the Antonine Wall could grow from the current level of £3m to £5m over 5 years and a cumulative impact of £21.7m over 5 years based on public sector spend of £3.2m
- In addition to these impacts, a range of regeneration projects along the Wall could be developed into official Antonine Wall partner projects – a 'string of pearls'. These projects are identified and prioritised in the report.

Finally, we make a range of conclusions and recommendations, bearing in mind the need to balance conservation and economic development, the main recommendations being:

- Engaging local groups by highlighting specific projects to get involved with
- Trademarking the Antonine Wall logo so there is some control of its use
- Seeking to develop visualisations of the Wall where possible whether virtual or physical
- Developing a long distance walking trail subject to safeguarding the Wall's vulnerability to too much traffic
- Developing a range of official merchandise
- Engaging to develop the 'string of pearls' along the line of the Wall – a series of 'Official partner visitor centres'.
- Developing funding bids to support projects.

These measures will help to develop the Wall's legacy, widen its appreciation and generate increased benefits for years to come.

1. Introduction

Brookdale Consulting was commissioned by the partners to the Antonine Wall (Historic Scotland, Falkirk Council, North Lanarkshire Council, East Dunbartonshire Council, Glasgow Council and West Dunbartonshire Council) to undertake a Socio-Economic Impact study of the Antonine Wall (the Wall).

The work took place between October 2014 and March 2015 and involved the following stages:

- Review of official data to determine the characteristics of the economy and people living close to the Wall
- Review of a range of other World Heritage Sites to establish best practice and to learn lessons.
- A wide range of consultations with stakeholders
- A survey of businesses to establish current Antonine Wall activity or interest in developing activity
- Economic modelling of current activities (baseline) and future potential
- Conclusions and recommendations for the future.

Brookdale Consulting acknowledges the time and co-operation of all stakeholders and consultees in the production of this report.

This report sets out the findings. The report is set out as follows, with each section having a summary at the start.

- The People and Economy of the Antonine Wall today
- Best Practice at other World Heritage Sites
- Business Survey
- Economic Modelling
- Conclusions and Recommendations on the way forward.

Appendices contain background data to the work.

2. The People and Economy of the Antonine Wall today

Overview of Findings

- Along the line of the Wall there are:
- 80,000 people in 34,800 households
- 3,300 businesses employing 32,500 people
- 5% of these people are amongst the 10% most deprived in Scotland
- Two thirds of businesses have less than five staff
- 15 large businesses in the wider area around the Wall
- Manufacturing and wholesale/retail are the largest sectors, together employing almost 10,000 people
- Unemployment is similar to the rest of Scotland
- 13% of people are income deprived
- 12% of working people are employment deprived
- Tourism accounts for 3,100 jobs
- 22 limited companies use ‘Antonine’ in their branding

2.1 Introduction

The Antonine Wall was constructed from 142 AD and occupied for about a generation. It was inscribed as a World Heritage Site in 2008 but there has never been an assessment of its impact on the local economies and communities that it runs through. The first stage of this assessment has been to review the data available on the people and economy of the Antonine Wall today.

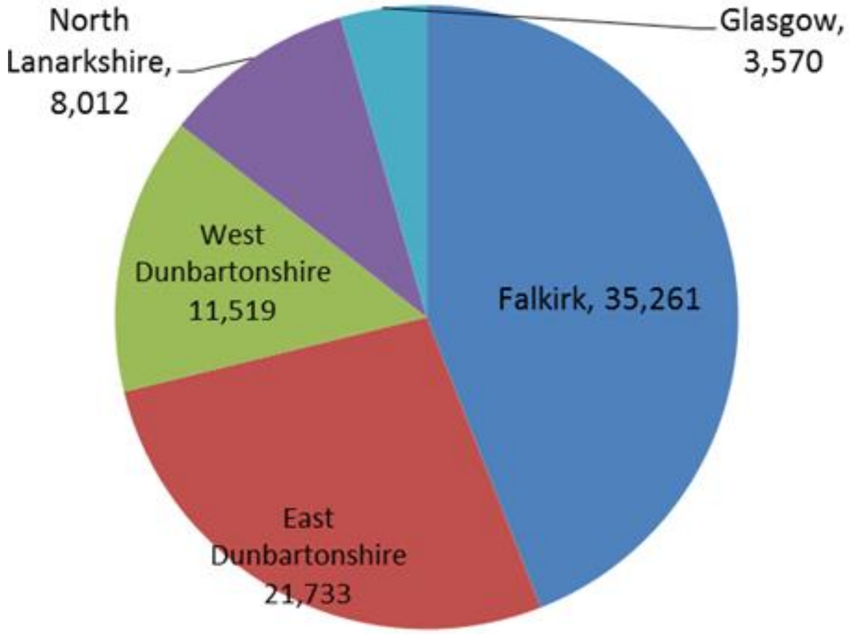
The data cover the Wall and its buffer zone with a list of the geographies used in Appendix 1. Appendix 2 contains supporting information in the form of tables, charts and sources of data.

2.2 People Profile

Just over 80,000 people live along the route of the Antonine Wall in 34,800 households. This is 6% of the people living within the 5 local authorities along the Wall and 2% of the population of Scotland (see Table A1).

Figure 2.1 shows that Falkirk has the largest number of people living close to the Wall (35,000), in fact, 23% of Falkirk Council's population live on the route of the Wall. East Dunbartonshire also has a sizeable number living close to the Wall at 22,000, (21% of the Council area). At the other end of the scale, Glasgow has the smallest number of people living along the route of the Wall at 3,600 (1% of its population).

Figure 2.1: People living along the Antonine Wall

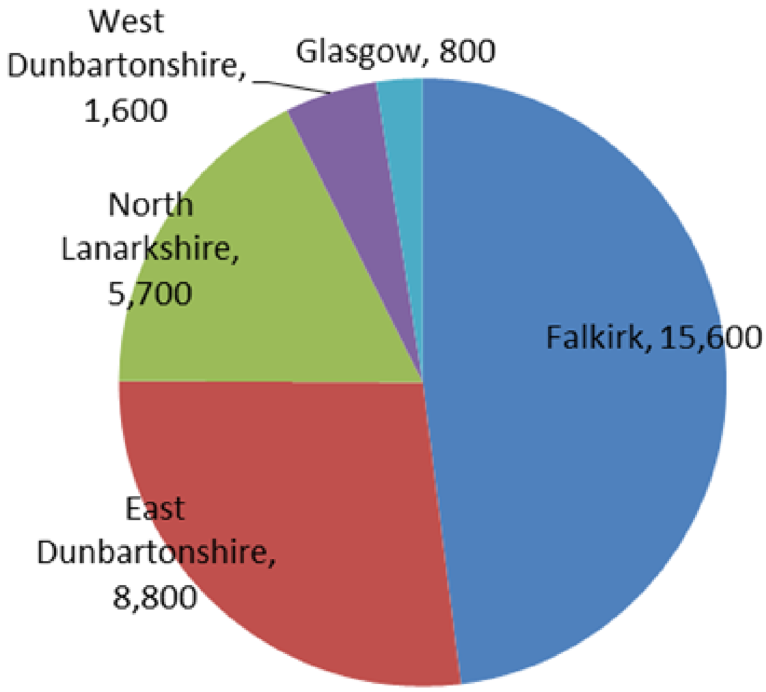


Source: 2011 Census of Population

2.3 Business Profile

We estimate that there are 3,300 businesses employing 32,500 people along the Wall; this number increasing by 7% since 2009 (see Figure 2.2 and Table A6).

Figure 2.2: Jobs along the Antonine Wall



Source: BRES

Two-thirds employ less than 5 people - similar to the Scottish average. There are fifteen large companies with more than 250 employees in the wider area around the Wall (see Table A8).

Retail and professional service businesses represent almost 40% of the businesses along the Wall (see Table A7).

2.4 Jobs Profile

Almost half of the jobs are within Falkirk and a further quarter in East Dunbartonshire. A relatively small proportion of jobs are in Glasgow and West Dunbartonshire.

The proportion of full time jobs is above the Scottish average at 71% compared with 67%. The only Council where part-time employment exceeds the Scottish average is in West Dunbartonshire where only 60% of jobs are full time.

2.5 Deprivation

A number of areas along the Wall (known as data zones) suffer from high levels of deprivation as defined in the Scottish Index of Multiple Deprivation (SIMD).

Overall, 5% of the people living along the Wall are amongst the 10% most deprived in Scotland (see Table A3).

simd Scottish Index of Multiple Deprivation

Five datazones fall within the 1% most deprived areas in the country including 3 of the 4 datazones in Glasgow, one datazone in Falkirk and one in East Dunbartonshire. In contrast, there are no datazones along the Wall in either North Lanarkshire or West Dunbartonshire among the 10% most deprived areas in Scotland.

Income and Employment deprivation are closely linked with:

- 13% of the people living along the Wall being income deprived, and
- 12% of working people being employment deprived.

Both of these figures are below the Scottish average. As with overall SIMD scores, the datazones within Glasgow have much higher levels of income and employment deprivation than the other areas along the Wall (see Figure A2).

2.6 People Characteristics

Some characteristics of the people living along the Wall in comparison to Scotland are set out below:

- The age profile of people is broadly similar to the Scottish average, though there are fewer 16-44 year olds (35% compared with 38%), fewer old people and slightly more under 16s (see Table A2).
- The health of people is identical to the Scottish average - 52% have very good health and only 5% poor health (see Figure A1).
- There is a higher proportion of family households than Scotland and a slightly higher proportion of older (over 65) one-person households (see Figure A3).
- Car ownership is above the Scottish average, only 25% of households do not have access to a vehicle compared with 31% at the Scotland level. Only the area of the Wall within Glasgow has below average car access (see Figure A4).
- Qualifications of the working age people are similar to the Scottish average (77%), though in Glasgow the level is lower at 59% (see Figure A5). Across the Wall a slightly lower proportion hold level 4 qualifications than Scotland (24% versus 26%) with East Dunbartonshire having the highest qualifications - a third holding Level 4 qualifications (see Table A4).

Overall 70% of working age people living along the Wall are economically active. This is marginally above the Scottish average. The parts of the Wall in Glasgow have the lowest levels of economic activity, with fewer than half of the working age population in employment and only a small proportion in self-employment (see Figure A6).

2.7 Unemployment

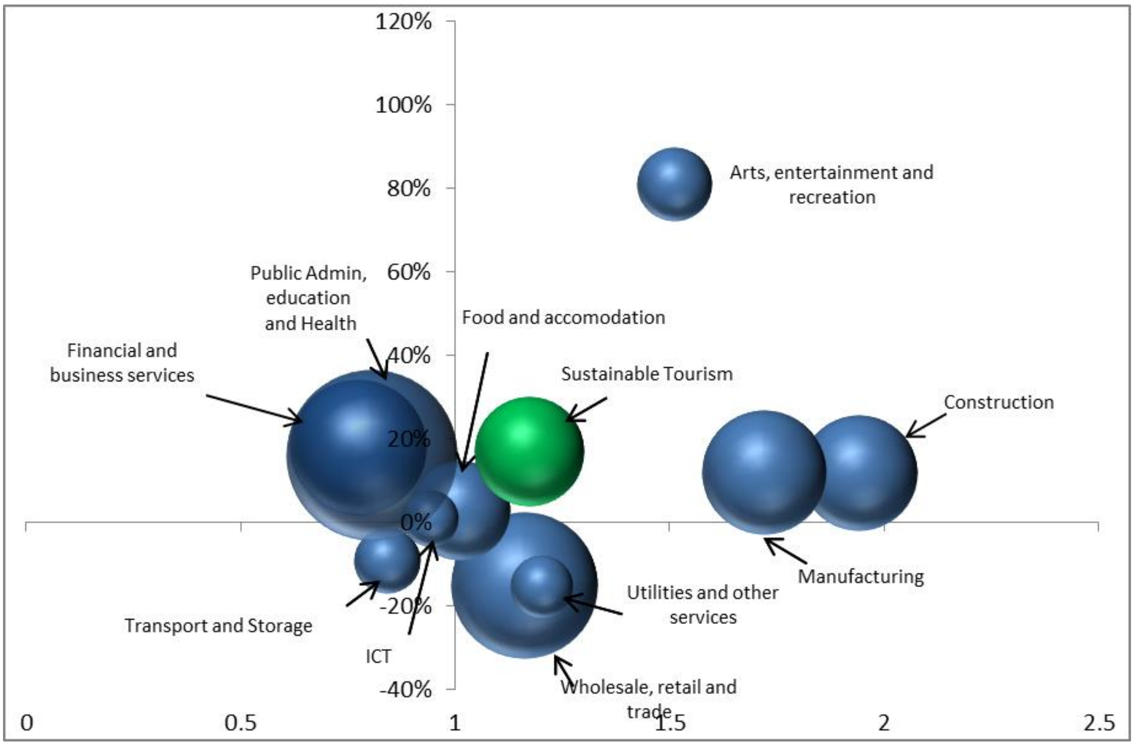
Unemployment rates are similar to the Scottish average of 5%, although the rates in Glasgow are a lot higher. In October 2014, there were just over 1,100 people claiming unemployment benefits in the area along the Wall, a figure which has been falling over the last 18 months.

2.8 The Main Business Sectors along the Antonine Wall

Table 2.1 shows that manufacturing and wholesale/retail are the largest sectors, together employing almost 10,000 people.

The bubble chart in Figure 2.3 shows the size, growth and relative concentration of sectors versus Scotland. Any sector above the horizontal line is growing. Any sector right of the vertical line is more represented in the area than the rest of Scotland. Several sectors have a higher proportion of jobs than the Scottish average – in particular manufacturing and construction between them provide 23% of the jobs in the area compared with the Scottish average of 13%.

Figure 2.3: Bubble chart showing key sectors



Visit Scotland data indicate that there are 3,100 tourism jobs located close to the Wall. Over two-thirds of these are located in Falkirk, where more than half of all tourism jobs in the Council area are close to the Wall. The number of tourism jobs has increased by 17% from 2009-2013. A number of Scotland's most visited tourism destinations are located in Falkirk – The Falkirk wheel, with 409,000 visits in 2013 and the Kelpies, which have recently been named National Treasures.

Table 2.1 is listed in order of the proportion of jobs along the Wall versus Scotland. Anything over 1.0 suggests a higher concentration in that sector than Scotland.

Table 2.1: Antonine Wall Employment by Sector

	Employment 2013	Change 2009-13	Proportion of jobs vs Scotland
Construction	3,500	12%	1.94
Manufacturing	4,000	12%	1.72
Arts, entertainment and recreation	1,400	81%	1.51
Water supply; sewerage, waste management	300	17%	1.51
Real estate activities	700	42%	1.45
Public administration and defence	2,500	26%	1.34
Wholesale and retail trade	5,500	-15%	1.16
Other service activities	700	-25%	1.10
Accommodation and food service activities	2,600	3%	1.01
Information and communication	800	1%	0.94
Administrative and support service activities	2,200	8%	0.90
Education	2,200	7%	0.89
Transportation and storage	1,100	-9%	0.84
Professional, scientific and technical activities	1,600	25%	0.73
Human health and social work activities	2,800	16%	0.56
Financial and insurance activities	300	20%	0.31
Agriculture, forestry and fishing	*	*	*
Mining and quarrying	*	*	*
Electricity, gas, steam and air conditioning supply	*	*	*
Total	**32,500**	**7%**	**1.00**
Tourism	**3,100**	**17%**	**1.17**

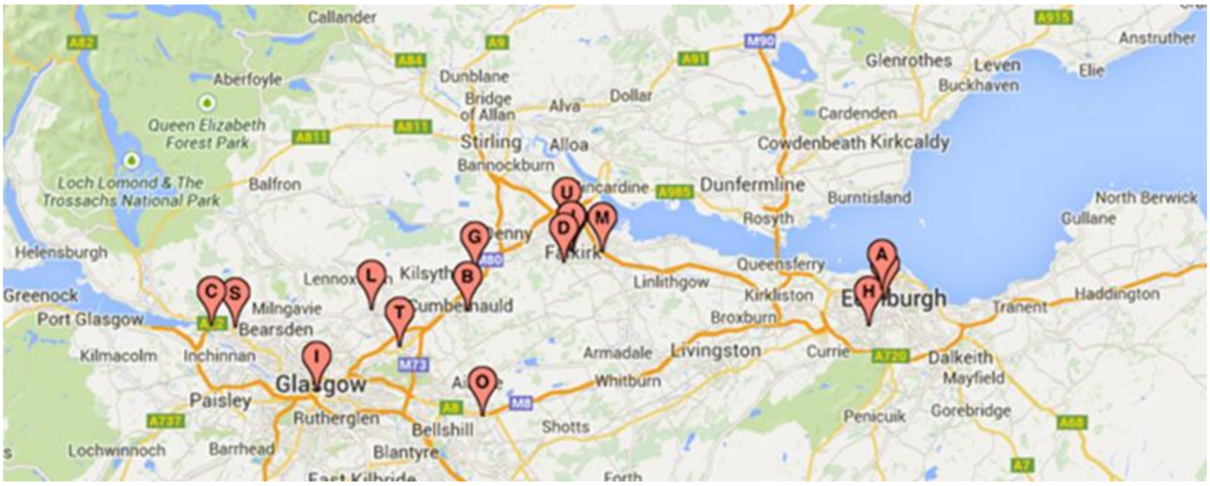
Source: BRES * means too few jobs to report

2.9 Businesses using the Antonine Wall in their branding

A search at Companies House reveals that 22 limited companies are using the Antonine name in their branding. The predominant sector of these businesses is construction related. Others include finance, IT, printing, security and recreation.

Figure 2.4 shows the location of these businesses which are generally located in the vicinity of the Wall.

Figure 2.4: Businesses using the Antonine name in their branding



Source: Google Maps

Table 2.2: Limited Companies using the name Antonine

Antonine All Trades Ltd	Construction
Antonine Contracts Limited	Construction
Antonine Ecosse Limited	Construction
Antonine Property Developments Group Ltd	Construction
Antonine Property Investments Limited	Construction
Antonine Homes Ltd	Construction
Antonine Estates Ltd	Property
Antonine Housing Cooperative Limited	Housing Association
Antonine Bis Limited	IT
Antonine Consulting Limited	IT
Antonine Technology Ltd	IT
Antonine Press Ltd	Printing
Antonine Printing Inks Limited	Printing
Antonine Asset Management LLP	Asset Management
Antonine Auctions Limited	Auctions
Antonine Transport Consultancy Limited	Transport Consultancy
Antonine Business Consultancy Limited	Business Consultancy
Antonine Care Limited	Homecare
Antonine Group Demolition Ltd	Demolition
Antonine Investment Managers Limited	Finance
Antonine Security & Risk Solutions Limited	Security
The Antonine Sports Centre	Sports facilities

Source: Companies House

3. Best Practice at other World Heritage Sites

Overview of Findings

- Signage is vital from motorway right down to the car park – as is managing expectations of what the wall is. Can the Wall be added to car navigation systems in the UK?
- A long term sustainable funding model for management is required – the partners are well aware of this finding. A Trust can be a useful mechanism for fund raising in the right context.
- Develop good quality consistent interpretation and ideally an interpretation centre – though this is costly – Regensburg cost €3m, €1.5m for interpretation itself. Could this be developed with partners as a long term vision?
- Involve local groups and communities as much as possible and ensure good communication and knowledge of who to go to for different aspects
- Manage expectations of stakeholders by setting realistic goals and reporting back on achievements - this will help maintain enthusiasm
- Demonstrating strong partnership in this way is vital for funder/investor support
- Harnessing local community volunteers could generate substantial added value – there is no such culture in Germany where everything is top down
- Develop a strategic relationship with HLF so that projects across the area are promoted coherently and with appropriate linkages
- Find alternative ways of visualising the Wall using digital technology
- Encourage joint funding bids from right across Europe and increased exchange of ideas and people.

The review of best practice considered other World Heritage Sites or potential World Heritage Sites in the UK and overseas including the Frontiers of the Roman Empire (FRE). The locations covered were Jurassic Coast, Hadrian's Wall, German Limes, Regensburg and Danube Limes.

For each site, the review considered the following with full details in Appendix 3:

- Background to the site, its status and overview of investment
- Governance and management arrangements
- Main socio-economic activities
- Main barriers encountered in developing the site
- Critical success factors and lessons learned that might be applied to the Antonine Wall

Key lessons from each site are set out below.

3.1 Jurassic Coast

The 'Jurassic Coast' of Dorset and East Devon was designated as England's first natural World Heritage Site in December 2001. Running from Exmouth in East Devon to Studland Bay in Dorset, it has 95 miles of exposed coastline showing a sequence through Earth's History covering the Triassic, Jurassic and Cretaceous periods.

The management is undertaken by a team funded by the local authorities, but there is also a Trust which undertakes fund raising and certain activities. The main objectives are around encouraging sustainable tourism, particularly in the off-season and ensuring strong partnership working between different areas.

3.2 Hadrian's Wall

Hadrian's Wall is a Roman frontier built from AD 122-30 by order of the Emperor Hadrian. It is 73 miles long running from Wallsend-on-Tyne in the east to Bowness-on-Solway in the west. It was designated as a WHS in 1987.

The Hadrian's Wall Trust recently folded as its funding was cut. Now one Council and the National Park Authority have taken over a reduced staff complement. Sustainable tourism is a key objective including engaging local businesses, community groups and volunteers - being business friendly is important. Good communication, partnership and innovation are seen to be vital going forward.

3.3 German Limes and Regensburg

The German Limes stretch for 550km from the north-west of the country to the Danube in the south-east. With 900 watchtowers and 120 forts the German Limes were designated as a WHS in 2005. Regensburg is an important city on the Limes which is currently inscribed as a World Heritage Site as a medieval centre, and will also become part of the FREWHS.

Substantial public funding is made available in Germany for the Limes but there is little local community engagement or involvement such as that found along the Antonine Wall and a lack of tourist culture in some rural areas despite investment. There is also seen to be less cultural interest in walking than in the UK. The focus has thus been on conservation and interpretation. The high cost of visitor centres was highlighted with one centre at Regensburg costing €3m, €1.5m for interpretation and €1.5m for the building.

3.4 Danube Limes

The Danube Limes continue the Frontiers of the Roman Empire stretching across ten countries. A new tourism strategy is being published. The main aim is to increase sustainable tourism, and while there is commitment, there is a need to improve consistency and to unify the FRE across Europe through joint funding bids, increased use of technology and exchange of ideas and people.

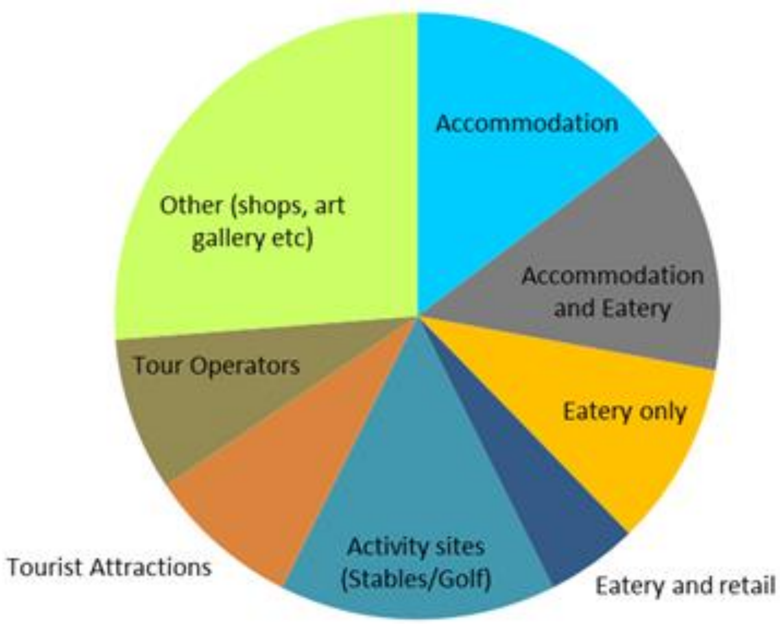
4. Business Survey

Overview of Findings

- 61 businesses completed the survey
- These were mostly small businesses on or near the Wall
- Nearly half (45%) of businesses currently have activities associated with the Wall, however for all but one, this generates only 0-5% of their business turnover
- Over 80% of those surveyed were interested in the potential to generate new business activity from the Wall

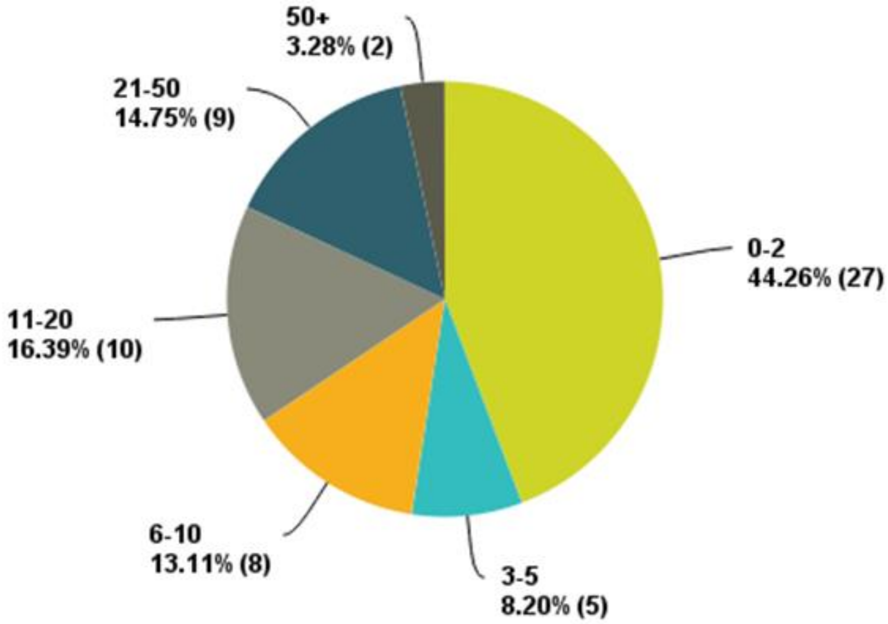
A business survey was undertaken to establish current levels of economic activity and how they could be increased. In total there were 61 responses, the vast majority completed by telephone. Figure 4.1 below shows the types of businesses surveyed and Appendix 3 shows the companies who completed the survey.

Figure 4.1: Range of business types surveyed



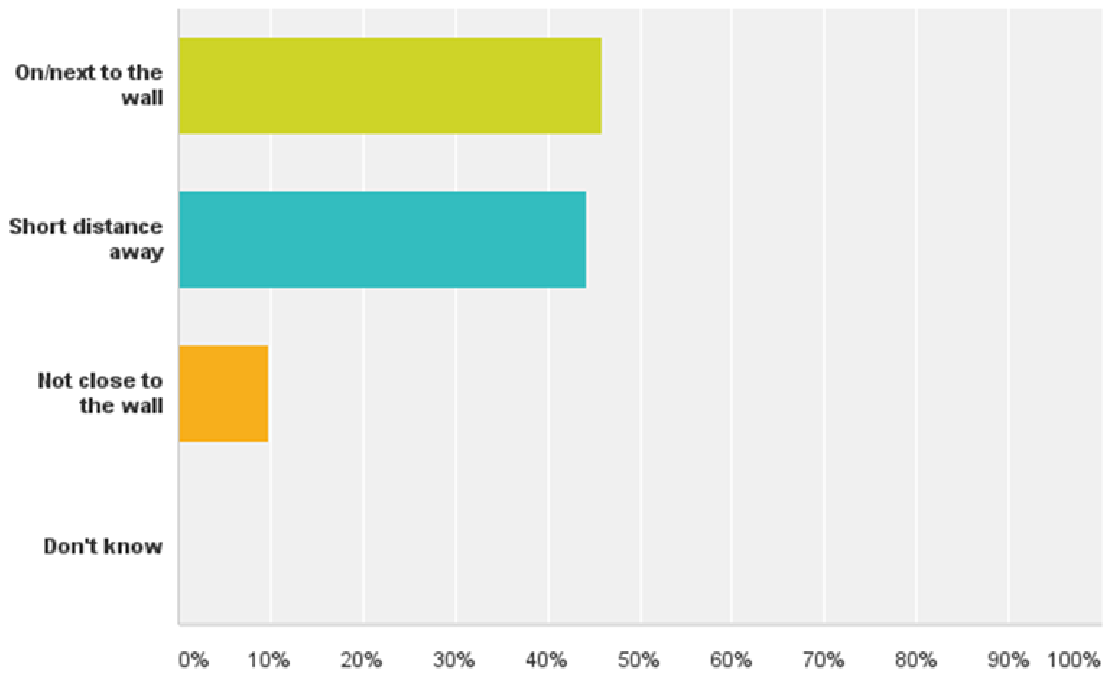
Of those surveyed it can be seen that more than half were from small businesses of less than 5 employees (see Figure 4.2), with only two having more than 50 employees.

Figure 4.2: Number of employees (full time equivalent number)



A very small percentage had no awareness of the Antonine Wall (8.2%) Figure 4.3 shows the proximity of businesses to the Wall where it can be seen that 90% of businesses were either on/next to or a short distance away from the Wall. This is not surprising since the survey targeted businesses close to the Wall.

Figure 4.3: Proximity of businesses to the Antonine Wall



Of those surveyed 45% currently have activities associated with the Wall, however 96.3% of these said that the total business turnover related to the Wall was very small (only 0-5%). Some examples of the extent are:

- Once a year ramblers breakfast, other than that maybe 2 walkers/week
- 1-2 tours/year with 6 people per tour
- A few of our overnight guests go walking on the Wall
- We mention the Wall in our publicity

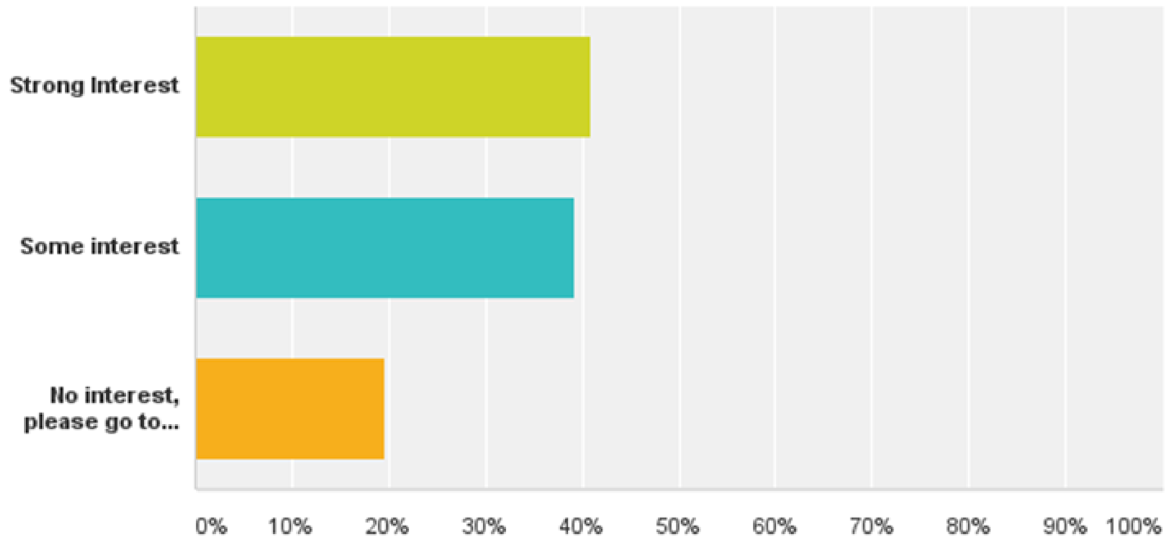
There was only one business with all of its business turnover related to the Wall. It operates guided tours along the Wall in groups of 1-2 with up to 20 people per tour and with 200+ visitors to the Wall last season, its first year of business.

In summary, the activities associated with the Wall ranged from guided tours, walking holidays and accommodation or eating facilities near the Wall. 35.7% of those companies felt that their activity was growing.

The majority of respondents did not think that there was any benefit from the Wall at present, however if the profile was raised and visitors increased there could be benefits from having a historical attraction in the area.

Over 80% of those surveyed were interested in the potential to generate new business activity from the Wall with 40% having a strong interest (see Figure 4.4). Again this is not surprising since businesses are always keen to develop new activities.

Figure 4.4: Level of interest in the Antonine Wall and the potential to generate new business activity in and around it



Almost 76% of those who had an interest in the Wall said they would be interested in more activity related to the Wall. These other activities ranged from selling Antonine Wall gifts (pocket money gifts and also larger items such as Antonine Wall whisky, decanters, glasses etc.), creation of recreational areas, visitor centres and tours (particularly if there were reconstructed sites).

In most cases, there was a sense that it was down to someone else to do something before these activities would be developed. In other words there is an expectation on the partners to enable things to happen.

5. Economic Modelling

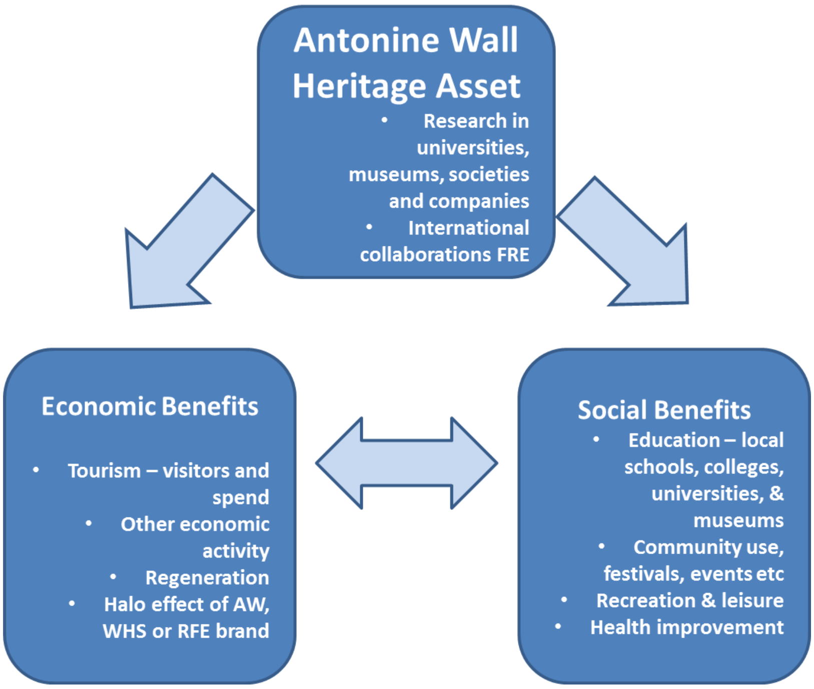
Overview

- The economic value of current activities related to the Antonine Wall is around £2m comprising museums, greenspace value, partner contributions and visitors to sites
- Museums are the largest activity based on the proportion of activity relevant to the Wall in consultations
- Greenspace value is based on the Wall accounting for a third of local greenspace with a notional value from the National Ecosystem Assessment.
- Research activity is based on consultations
- Visitors are estimated from consultations and spend from official data sources
- The actual baseline economic impact of the Antonine Wall, shows that current annual input costs of £632k generate annual benefits of £3m when direct, indirect and induced effects are included
- Forecast future impacts assume a long distance Antonine Wall walk is developed leading to increased overnight visitors and more tours are run at various sites. An additional PhD is assumed in research. Partner contributions are assumed to stay the same
- Future impacts estimate the impact of the Antonine Wall could grow from the current level of £3m to £5m over 5 years and a cumulative impact of £21.7m over 5 years based on public sector spend of £3.2m
- In addition to these impacts, a range of projects are identified along the line of the wall that could be developed into official Antonine Wall partner projects – a 'string of pearls'. These projects are identified and prioritised in the report.

The economic impact of the Antonine Wall has been developed around a framework of three aspects as set out in Figure 5.1, namely, heritage benefits, economic benefits and social benefits.

Using the data gathered in the consultations and business survey we were able to build up a robust picture of current activities and their impacts now (baseline) and future potential impacts subject to a number of assumptions.

Figure 5.1: Impact Modelling Framework



Appendices x and y contain a detailed list of the current and future impacts identified under each heading.

5.1 Current or baseline impacts

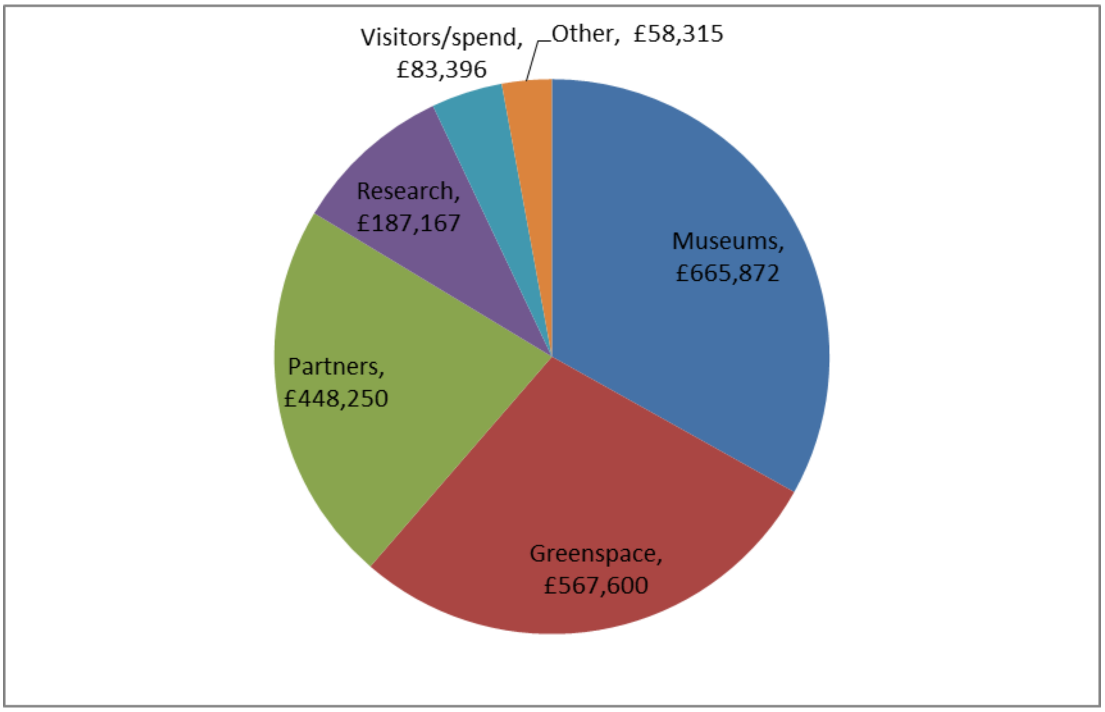
A summary of the current activities identified along with their economic value is set out in Figure 5.2. The total value of current activities related to the Antonine Wall is just under £2m, split as follows:

- **Museums** - It can be seen that museums form the largest share of activity. Value estimates are based on visitor numbers, the proportion of visitors related to the Antonine Wall (based on consultations) and an assessment of visitor spend from official sources[3].
- **Greenspace** is the second most important benefit – in other words, an economic value on the fact that the Antonine Wall provides an important source of greenspace to the local people living in the area[4]. This was supported by consultations, the survey and by visits to the Wall on a number of days when large number of walkers were noted. The Antonine Wall Partnership is protecting and enhancing this space for public benefit.
- **Partners –** Historic Scotland maintains nine sites and funds the Co-ordinator post while Councils have small annual budgets for capital and some staff time.

[3] Based on the GB Tourism Statistics 2013.
[4] This is drawn from the National Ecosystem Asssessment – see Appendix x for details.

- **Research –** an estimate of Antonine Wall research based on consultations with a proportion of the Roman researchers in Scotland (a fifth) and a current PhD post to analyse recent laser scanning data.
- **Visitors/spend –** this is based on estimates of current visitors to the main sites (2,000 for 3 sites and 10,000 for Rough Castle) based on Historic Scotland data for other sites. Visitor numbers are multiplied by an official estimated spend figure (see appendix for assumptions). The small size of this category is a reflection of the small number of current visitors but with potential to grow.
- **Other –** this final category covers a range of inputs including volunteer time, the recent TV programme and local festivals.

Figure 5.2 Summary of current Antonine Wall activities and their economic value



Source: Brookdale Economic Model

A summary of the main assumptions used to generate economic values is set out in Table 5.1.

Table 5.1 Summary of the main assumptions used to generate economic values

Assumptions	Value	Source
Short stay visitor	£3.45	Assume 1/8 of day visitor value
Day Visitor	£28	GB Tourism Statistics 2013 day visits - outdoor activities
Overnight Visitor	£64	Scottish Tourism Statistics 2013
Coach hire	£500	Industry estimate
Price of book	£20	Consultations
PhD stipend	£15,000	Research Councils UK
Management FTE per head including on-costs	£60,000	Industry estimate
Museum FTE per head including on-costs	£30,000	Industry estimate
Value of greenspace	£22	National Ecosystem Assessment - value of having woodland within 1km of home but divided by 3 in the model to represent the fact that the Antonine Wall is a third of local greenspace (the Canal and other greenspace forming the other two thirds)

To estimate the actual baseline economic impact of the Antonine Wall, we separate the input costs from the benefits as shown in Table 5.2. This shows that current annual input costs of £632k generate annual benefits of £3m when direct, indirect and induced effects are included[5]. For volunteering time, we assume that since it has no financial cost, it is a benefit, rather than a cost.

Table 5.2 Summary of Economic Impacts of the Antonine Wall (baseline)

	Input Costs	Total direct Benefits	Direct, indirect and induced effects	Type I and II multiplier effect
Visitor spend	-	£764,405	£1,375,929	1.8 (cultural services)
Salaries (public and academic)	£399,000	£399,000	£678,300	1.7 (public admin/education)
Capital spend	£233,250	£233,250	£396,525	1.7 (repair and maintenance)
Amenity value	-	£567,600	£567,600	Assume no multiplier
Volunteering time	-	£46,345	£46,345	Assume no multiplier
	£632,250	**£2,010,600**	**£3,064,699**	

[5] These are the ripple effects of spending across the economy.

5.2 Future impacts

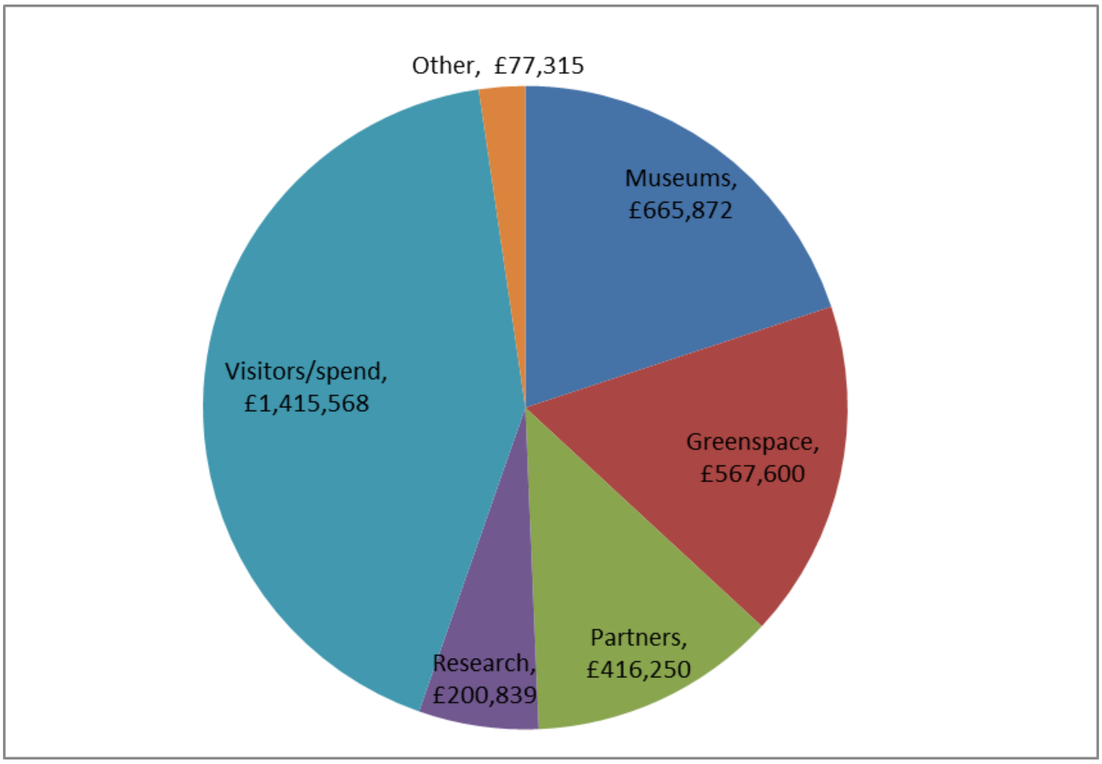
Having established the baseline impacts of £3m we have forecast forward the continuance and growth of socio-economic activity in line with the following conservative assumptions over 5 years:

- **Visitors –** we assume that tour visitors grow from 200 to 1,000; that gift sales grow at the Falkirk Wheel to 1,000 units over 5 years; that visitors to Twechar Healthy Living Centre increase and that the development of a long distance Antonine Wall walking trail generates new overnight visitors rising from 1,000 to 5,000 over the period and that other overnight visitors for the Wall grow by 50 per year to 250.
- **Research –** we assume research continues plus a second PhD is started in year 4. Future research objectives might include identifying remains of watchtowers, the remaining undiscovered fortlets, or more of the civil settlements around the Wall.
- **Community Regeneration** – we assume that community regeneration projects develop at Watling Lodge, Auchinstarry, Twechar and Old Kilpatrick.
- **Other impacts –** we assume that all other impacts continue at constant levels.
- **Partner Spend –** other than current one-off updating of interpretation we assume that partner spend remains constant.

We assume that the above levels of growth can be delivered within the current peak annual funding envelope from the partners plus an HLF bid.

On the basis of the above, the economic impact of the Antonine Wall could grow from the current level of £3m to £5m over 5 years and a cumulative impact of £21.7m over 5 years based on public sector spend of £3.2m. Long distance walking with associated overnight stays and tours would be the main drivers of growth. A summary of the forecast of economic value of the various aspects in Year 5 is shown in Figure 5.3.

Figure 5.3 Summary of future forecast annual Antonine Wall activities and their economic value (by year 5)



Source: Brookdale Economic Model

5.3 String of Pearls

In addition to these impacts, we have also identified several potential private/public, voluntary and third sector regeneration projects that could be developed along the Wall as a 'String of Pearls'. The impacts of these are not included in the model.

There is potential to develop 'Antonine Wall Official Visitor Centres' in private/public/third sector partnership plus continuing engagement with the museums. These projects are listed below from east to west along the line of the Wall.

Kinneil House and Friends of Kinneil – this active community group with support of Falkirk Council has plans to develop Kinneil Estate where the Antonine Wall runs through. The existing museum there could be expanded along with improved access to Kinneil House and other improvements such as improving signage along the Wall. There is also potential for a Roman fortlet playpark to improve the interpretation of the Kinneil fortlet. We recommend maintaining contact on this.

Falkirk Distillery – a new distillery is being constructed on the line of the Wall at Beancross and as part of the planning permission there is a condition to put in Roman interpretation. The distillery, which is being developed by a local entrepreneur, is keen to cross-promote the Wall and give consideration to an

Antonine Wall Whisky plus other retail opportunities. Opening is scheduled for August 2015. We recommend contact to develop matters further.

Clan Ranald site, Falkirk – the Trust has a site which the Wall runs through in Falkirk. Access and parking are poor which may restrict development. Clan Ranald is an interesting organisation with potential to provide re-enactments of the Celts alongside the Roman re-enactments of the Antonine Guard so we recommend contact to explore potential.

Barnardos, Watling Lodge – there are proposals to develop a community garden around the site of a fortlet with interpretation and community café to train young people, provide volunteering opportunities and in the medium term to provide an Antonine Wall visitor centre. Barnardos also has a training wing 'Barnardos Works' that could carry out improvement works along the Wall subject to an action plan being developed. We recommend on-going engagement with Barnardos to develop volunteer training projects and to specifically develop an official Antonine Wall Visitor Centre.

Auchinstarry Basin – between the Wall and Auchinstarry the Forestry Commission has a site where a half scale wall reconstruction is proposed. There may also be potential for a Roman fortlet playpark in the vicinity. The Port Gallery at Auchinstarry might also encourage local artists to paint Antonine Wall scenes and/or to stock Antonine Wall merchandise. We recommend maintaining contact on this development.

Woodend Farm and Stables – there is interest in running Antonine Wall pony trekking using the mining paths on Croy Hill. This could be combined with canal boat trips to pick up visitors and drop them off. In addition, the owners of Woodend have planning permission for 12 holiday chalets and visitor centre at Woodend Farm which is a short distance north of the Wall beside Kilsyth. This could form an official Antonine Wall Visitor Centre. They can also offer safe off-road access to Colzium Estate. We recommend exploring the potential to take matters further.

Croy Miners Welfare Club – this is a modern building right on the line of the Wall, however, it is closed due to financial problems. The Croy Historical Society has a room with Roman displays but there is no current public access. Whilst this would be an ideal location to develop, there is not enough current Antonine Wall footfall to support re-opening of the building on its own. Longer term it might be feasible to test its potential for conversion to a bunk house as part of an Antonine Wall trail but in the meantime we recommend maintaining contact.

Twechar Healthy Living Centre – the centre is a little off the line of the Wall but has a café, toilets and interest in encouraging local visitors (currently around 4 coaches a year come to the Centre as part of Antonine Wall visits). There is real interest in providing interpretation and a possibility that it could become an official Antonine Wall Visitor Centre. We recommend contact to support testing feasibility of interpretation at the Centre.

Wilderness Plantation Antonine Wall Country Park – from Lambhill Stables northwards there is potential to develop an Antonine Wall Country Park taking in the local wildlife reserve (Scottish Wildlife Trust); the Antonine Wall east of Balmuildy; the Wilderness Plantation (SSSI in private ownership); the Cadder Pits (former mines of the Carron Iron Company) including interpretation of the Cadder Pit disaster of 1913; Mavis Valley (former pit village now ruinous); Hunter Environmental Village (with former brickworks); Buchley Ecocentre (organic waste recycling); and former land fill sites for bio-energy demonstration. A visitor centre could be established close to the Buchley Ecocentre and Edrington bonded warehouses with nature trails, activity trails and mountain biking. This is a long term project with a wide potential partnership of organisations but could contribute to several policy objectives – including social cohesion, outdoor access, healthy living, natural & historic environment, training and volunteering, local tourism etc. We recommend maintaining contact.

Old Kilpatrick Wall Termination – the Wall terminates beside the canal at Old Kilpatrick, on the edge of the River Erskine. At the moment there is nothing to formally mark the spot, though there is a ruined property beside the canal and a pedestrian bridge. Longer term there could be potential to develop some kind of visitor centre here, but in the short term there are proposals by WDC to mark the termination with some kind of monument similar to the Bridgeness slab. We recommend inclusion in the Council's action plan with potential to explore community involvement.

A summary of these regeneration projects is set out below in terms of the nature of partnership (public, private, third sector or voluntary) and its status (happening now, or future). We have prioritised this list in terms of our understanding of likely timing so that the partners have a sense of where to engage first.

Table 5.3 Summary of prioritised 'String of Pearls' projects and their status

Project	Type of Partnership	Status
Falkirk Distillery	Private	Happening now
Auchinstarry Basin	Public	Happening now
Twechar Healthy Living Centre	Voluntary/ third sector/public	Future/ some happening now
Barnardos, Watling Lodge	Third sector	Future/ some happening now
Woodend Farm and Stables	Private	Future/ some happening now
Old Kilpatrick Wall Termination	Public sector	Future – WDC can prioritise this
Wilderness Plantation Antonine Wall Country Park	Voluntary/ third sector/public /private	Future long term – but interest shown now could help generate support.
Kinneil House and Friends of Kinneil	Community/ public sector	Future
Clan Ranald site, Falkirk	Third sector	Future
Croy Miners Welfare Club	Third sector	Future

6. Conclusions and Recommendations

The Antonine Wall has lain in the Scottish landscape for almost 2,000 years. In recent years it has largely been a dormant asset, well known locally but little known in comparison to other frontiers like Hadrian's Wall.

World Heritage inscription has raised the Wall's profile and status with an active management plan and partnership aiming to support delivery of heritage, economic and social benefits.

This report has provided an opportunity to uncover the scale of the local population and economy, highlighting 80,000 people and 3,200 local businesses along the line of the Wall; and a catchment area comprising much of the Central Belt and its large population. The report has considered comparator World Heritage Sites, most of whom receive much more investment than the Antonine Wall. It has attempted to estimate the heritage, social and economic benefits of the Wall now and how they could change in future with on-going investment.

The main conclusions of the work are as follows:

- **Early stage of development** - The Wall is still at an early stage of development with the essential need for an integrated package of basic measures to improved signage, paths, interpretation and car parking.

- **Local engagement** - There is wide knowledge and engagement around the Wall locally. Many local residents have been taught about the Wall when they were at school. Many local places or businesses are named after it. The most striking factor has been the level of local community and volunteer activity taking place along the length of the Wall and the opportunity to lever this resource to help achieve management plan objectives.

- **Community regeneration –** There is potential for the Wall to contribute to a range of community regeneration projects along its length that will support a number of objectives such as community cohesion, youth training, Wall conservation and improving visitor experience.

- **Visitor Centre** - Whilst there is a long term desire to create a new Antonine Wall visitor centre, the research has highlighted a number of private, public and third sector initiatives on or close to the Wall plus the museums which could become Antonine Wall Official Partners and help to secure additional heritage and socio-economic benefits along the length of the Wall.

- **Growing tourism economy** – The Central Belt is experiencing a strongly growing tourist sector driven by the Canal and other initiatives and most strongly felt in Falkirk (with the Falkirk Wheel and the Kelpies) but spreading westwards as well as the influence of Glasgow and Edinburgh as gateways for tourists. There is a need for culture change locally to embrace this trend and to provide enhanced activities to increase visitor numbers and lengthen stays.

- **Innovation** – given the current public funding environment there will be a need for innovation in partnership and projects in order to achieve desired outcomes – some examples are set out below.

- **Part of a wider offer** – the Antonine Wall fits well with the Canal and other attractions and its tourist development needs to be in this context as one part of what is on offer locally, rather than being presented in isolation.

- **Benchmark locations** – the review of best practice highlighted that other World Heritage Sites receive more funding; many are more developed; and some are strong tourist attractions in their own right. In several areas, a Trust is a useful mechanism for community engagement and fund-raising. However, the Antonine Wall appears to have very strong grass-roots support which, if harnessed, could give it a strong foundation for cost effective development. A strategic relationship with Heritage Lottery Fund would help in co-ordinating and developing this foundation.

We make the following recommendations for consideration by the Antonine Wall Partnership:

Long Distance Walk – We recommend that development of a long distance walk along the Antonine Wall could be a quick win subject to ensuring appropriate paths to avoid damage to the monument. This would grow overnight visitors, encourage outdoor exercise and raise the profile of the Wall. Tour operators have welcomed the concept which would require production of a guidebook, improved signage (including through town centres), better parking facilities, improved paths and some promotion.

Annual Action Plan Summaries – in addition to the Management Plan and in order to support engagement with local groups we recommend producing short one page documents on an annual basis that set out short term objectives of the Antonine Wall partnership and opportunities to get involved in specific projects along the line of the Wall.

Branding – we believe that the partners have developed a strong attractive logo that has potential to develop into a strong brand. Whilst there are the WHS and FRE brands, there is a risk of diluting recognition of the Antonine Wall or confusing. We therefore recommend focusing on using the existing Antonine Wall logo with all other brands (including partner logos) being subservient.

Trademark the Antonine Wall logo and branding. – A trademark offers protection in the event of abuse and some level of control, even if the trademark is licensed to users for a nominal sum. Alongside the trademark we recommend the existing style guide is made widely available to stakeholders to ensure consistency.

International dimensions – as part of the FRE, there is strong potential to develop the international dimensions of the Antonine Wall, through joint funding bids, exchanges, joint research projects etc. However this activity must take place within the context of available resources and we would recommend prioritising the basic measures to improve the Wall on the ground as the main priority.

Visualisation – the consultations were unanimous on the need for visualisation of the Wall whether through physical reconstructions or the use of technology. We recommend all opportunities are taken to create visual or physical reconstructions.

Antonine Wall Merchandise – Development of an official line of Antonine Wall merchandise would find a ready market in a number of established retail outlets and events along the line of the Wall and could grow strongly in the years to come. This might be taken on by local groups/individuals as a competition or by the Partnership.

String of Pearls – the study has highlighted the strong engagement along the line of the Wall from a range of public, private and third sector players. We have made recommendations for prioritisation of these partners in the previous section. There is potential to develop a series of 'Antonine Wall Official Partner – Visitor Centres' for the Wall. These would be identified locations where interpretation could be developed on a thematic basis with each Centre having a different focus. They would need to be bespoke to each location and partnerships developed to support delivery but they could have substantial impacts on community regeneration and economic development over and above the impacts modelled in the report.

Funding bids – development of the string of pearls will give rise to a range of public/ private partnerships which may be brought forward as funding bids to Scottish Government, LEADER, Trusts and/or HLF. We recommend regular dialogue and a more strategic relationship with HLF to support development of bids plus investigating the role that HLF feasibility funding could play.

These measures will help to develop the Wall's legacy, widen its appreciation and generate increased benefits for years to come.

Appendix 1: Geography of the Antonine Wall by Datazones and Intermediate Zones

Datazones

Council	Datazones
East Dunbartonshire	S01001452
East Dunbartonshire	S01001462
East Dunbartonshire	S01001466
East Dunbartonshire	S01001468
East Dunbartonshire	S01001469
East Dunbartonshire	S01001474
East Dunbartonshire	S01001481
East Dunbartonshire	S01001488
East Dunbartonshire	S01001499
East Dunbartonshire	S01001505
East Dunbartonshire	S01001510
East Dunbartonshire	S01001513
East Dunbartonshire	S01001516
East Dunbartonshire	S01001521
East Dunbartonshire	S01001522
East Dunbartonshire	S01001524
East Dunbartonshire	S01001525
East Dunbartonshire	S01001528
East Dunbartonshire	S01001531
East Dunbartonshire	S01001535
East Dunbartonshire	S01001536
East Dunbartonshire	S01001537
East Dunbartonshire	S01001540
East Dunbartonshire	S01001544
East Dunbartonshire	S01001548
Glasgow	S01003710
Glasgow	S01003715
Glasgow	S01003717
Glasgow	S01003718
North Lanarkshire	S01004913
North Lanarkshire	S01004926
North Lanarkshire	S01004928
North Lanarkshire	S01004929
North Lanarkshire	S01004930
North Lanarkshire	S01004932
North Lanarkshire	S01004935
North Lanarkshire	S01004937
North Lanarkshire	S01004943
North Lanarkshire	S01004945

Council	Datazones
Falkirk	S01002379
Falkirk	S01002391
Falkirk	S01002394
Falkirk	S01002411
Falkirk	S01002412
Falkirk	S01002413
Falkirk	S01002415
Falkirk	S01002416
Falkirk	S01002417
Falkirk	S01002421
Falkirk	S01002423
Falkirk	S01002425
Falkirk	S01002426
Falkirk	S01002427
Falkirk	S01002428
Falkirk	S01002429
Falkirk	S01002431
Falkirk	S01002432
Falkirk	S01002434
Falkirk	S01002435
Falkirk	S01002436
Falkirk	S01002437
Falkirk	S01002438
Falkirk	S01002441
Falkirk	S01002442
Falkirk	S01002444
Falkirk	S01002446
Falkirk	S01002456
Falkirk	S01002457
Falkirk	S01002470
Falkirk	S01002475
Falkirk	S01002477
Falkirk	S01002484
Falkirk	S01002485
Falkirk	S01002491
Falkirk	S01002492
Falkirk	S01002501
Falkirk	S01002502
Falkirk	S01002503

West Dunbartonshire	S01006205	Falkirk	S01002504
West Dunbartonshire	S01006210	Falkirk	S01002509
West Dunbartonshire	S01006213		
West Dunbartonshire	S01006215	West Dunbartonshire	S01006224
West Dunbartonshire	S01006217	West Dunbartonshire	S01006226
West Dunbartonshire	S01006218	West Dunbartonshire	S01006227
West Dunbartonshire	S01006220	West Dunbartonshire	S01006233
West Dunbartonshire	S01006221	West Dunbartonshire	S01006243
West Dunbartonshire	S01006223	West Dunbartonshire	S01006247

Intermediate Zones

Council	Intermediate Zone	Name
East Dunbartonshire	S02000264	Bishopbriggs West and Cadder
East Dunbartonshire	S02000266	Kessington East
East Dunbartonshire	S02000268	Bishopbriggs North and Kenmure
East Dunbartonshire	S02000269	Kessington West
East Dunbartonshire	S02000270	Lenzie North
East Dunbartonshire	S02000271	South Castlehill and Thorn
East Dunbartonshire	S02000276	North Castlehill and Thorn
East Dunbartonshire	S02000277	Hillhead
East Dunbartonshire	S02000278	Torrance and Balmore
East Dunbartonshire	S02000279	Keystone and Dougalston
East Dunbartonshire	S02000280	Harestanes
East Dunbartonshire	S02000281	Kirkintilloch West
East Dunbartonshire	S02000283	Twechar and Harestanes East
East Dunbartonshire	S02000285	West Clober and Mains Estate
East Dunbartonshire	S02000286	Milton of Campsie
East Dunbartonshire	S02000287	Lennoxtown
Falkirk	S02000441	Shieldhill
Falkirk	S02000443	Lochgreen, Lionthorn and Prospecthill
Falkirk	S02000445	Banknock and Haggs
Falkirk	S02000448	High Bonnybridge and Greenhill
Falkirk	S02000449	Polmont
Falkirk	S02000450	Laurieston and Westquarter
Falkirk	S02000451	Douglas
Falkirk	S02000452	Falkirk Town Centre and Callendar Park
Falkirk	S02000453	Bantaskin
Falkirk	S02000454	Blackness, Carriden and Grahamsdyke
Falkirk	S02000455	Tamfourhill
Falkirk	S02000457	Newtown
Falkirk	S02000459	Camelon East
Falkirk	S02000466	Kinneil
Glasgow	S02000713	Summerston Central & West
Glasgow	S02000714	Drumry West

Glasgow	S02000716	Drumry East
North Lanarkshire	S02000938	Carrickstone
North Lanarkshire	S02000939	Village and Castlecary
North Lanarkshire	S02000940	Kilsyth Bogside
North Lanarkshire	S02000941	Balmalloch
North Lanarkshire	S02000942	Kilsyth East and Croy
West Dunbartonshire	S02001188	IZ Five
West Dunbartonshire	S02001189	IZ Six
West Dunbartonshire	S02001190	IZ Seven
West Dunbartonshire	S02001191	IZ Eight
West Dunbartonshire	S02001193	IZ Ten
West Dunbartonshire	S02001194	IZ Eleven

Appendix 2: People and Economy of the Antonine Wall - Tables and Charts

Table A1: 2011 Population

	Antonine Wall	Council totals	% of Council
East Dunbartonshire	21,733	104,431	21%
Falkirk	35,261	154,192	23%
Glasgow	3,570	578,251	1%
North Lanarkshire	8,012	335,317	2%
West Dunbartonshire	11,519	90,028	13%
All Councils	**80,095**	**1,262,219**	**6%**
Scotland	5,295,403	5,295,403	
	2%	24%	

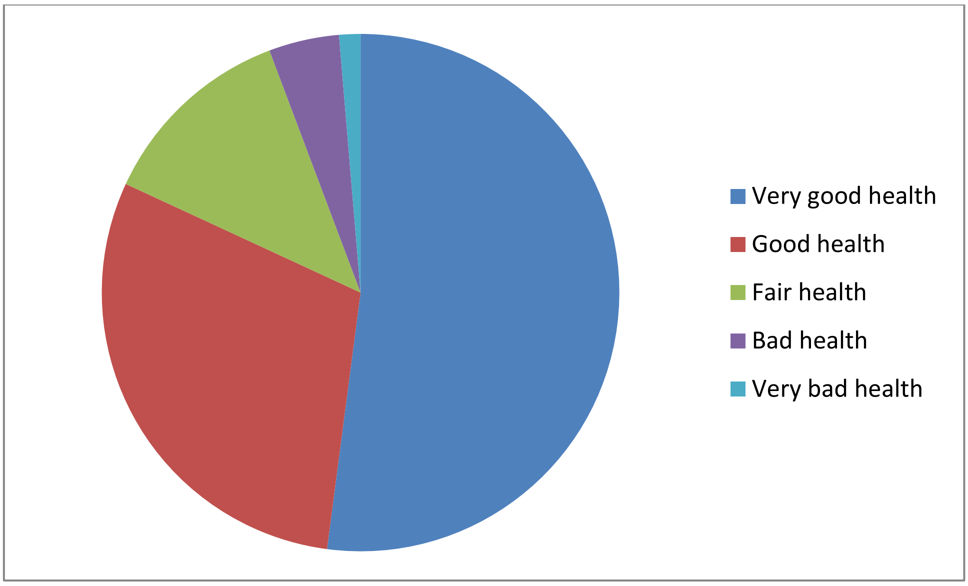
Source: 2011 Census (datazones)

Table A2: 2011 Age Profile

	0-15	16-24	25-44	45-74	75+
East Dunbartonshire	4,062	2,338	4,804	8,687	1,842
Falkirk	6,156	3,172	9,645	13,276	3,012
Glasgow	830	470	1,068	1,111	91
North Lanarkshire	1,640	888	1,934	3,066	484
West Dunbartonshire	1,899	1,231	2,764	4,669	956
Total	14,587	8,099	20,215	30,809	6,385
%	**18%**	**10%**	**25%**	**38%**	**8%**
Scotland %	17%	12%	26%	37%	8%

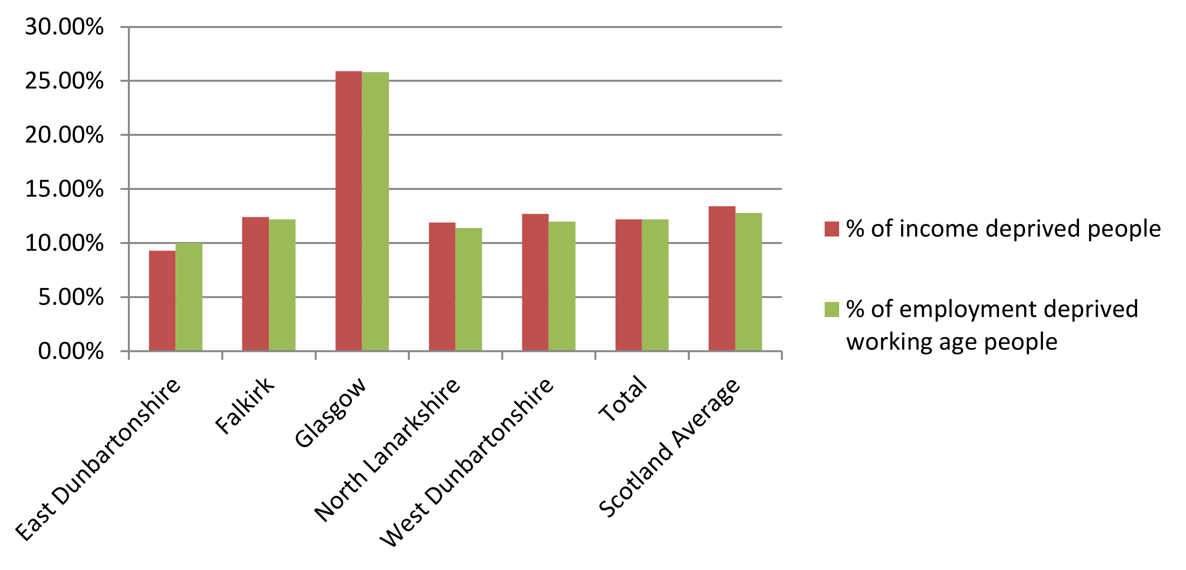
Source: 2011 Census (datazones)

Figure A1: Health Profile of Antonine Wall residents



Source: 2011 Census (datazones)

Figure A2: Income and Employment Deprivation Indicators, SIMD



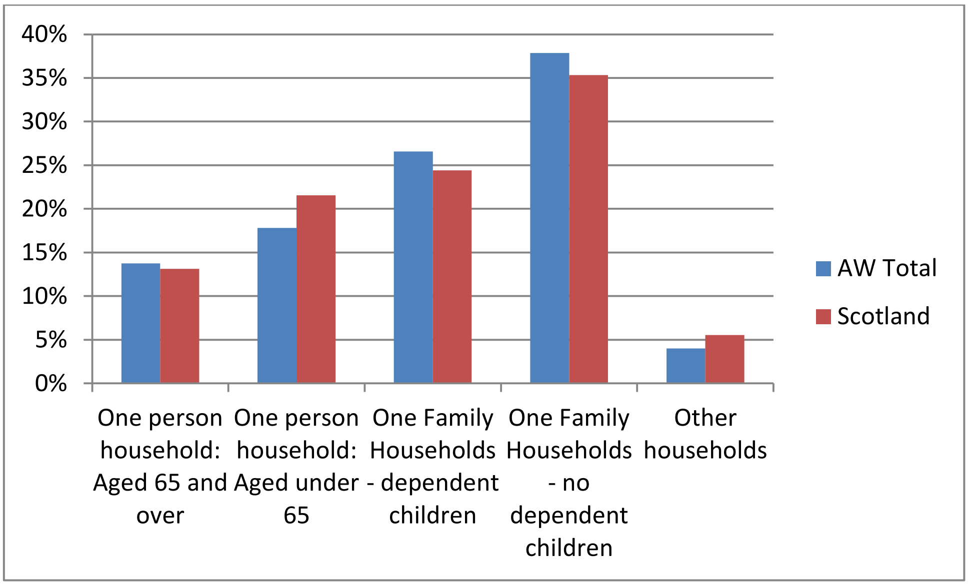
Source: Scottish Index of Multiple Deprivation 2012 (datazones)

Table A3: SIMD Indicators for Antoine Wall Datazones

	% of pop in living in 10% most deprived wards (overall SIMD)	% of income deprived people	% of employment deprived working age people	Health domain 2012 score	Education, Skills and Training domain 2012 score	Housing domain score 2004, 2006, 2009 & 2012	Geographic Access domain 2012 score	SIMD Crime 2012 score
East Dunbartonshire	4%	9.3%	10.0%	4%	4%	4%	0%	0%
Falkirk	2%	12.4%	12.2%	0%	6%	0%	3%	2%
Glasgow	70%	25.9%	25.8%	70%	70%	70%	41%	70%
North Lanarkshire	0%	11.9%	11.4%	0%	0%	0%	0%	0%
West Dunbartonshire	0%	12.7%	12.0%	0%	0%	0%	0%	0%
Total	5%	12.2%	12.2%	4%	7%	4%	3%	4%
Scotland Average		13.4%	12.8%					

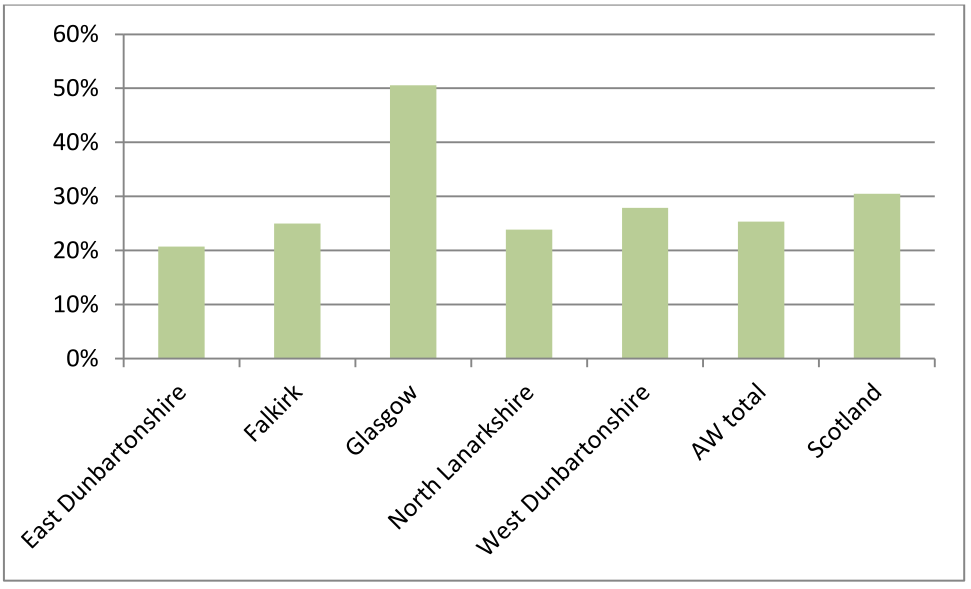
Source: Scottish Index of Multiple Deprivation 2012 (datazones)

Figure A3: Household Types



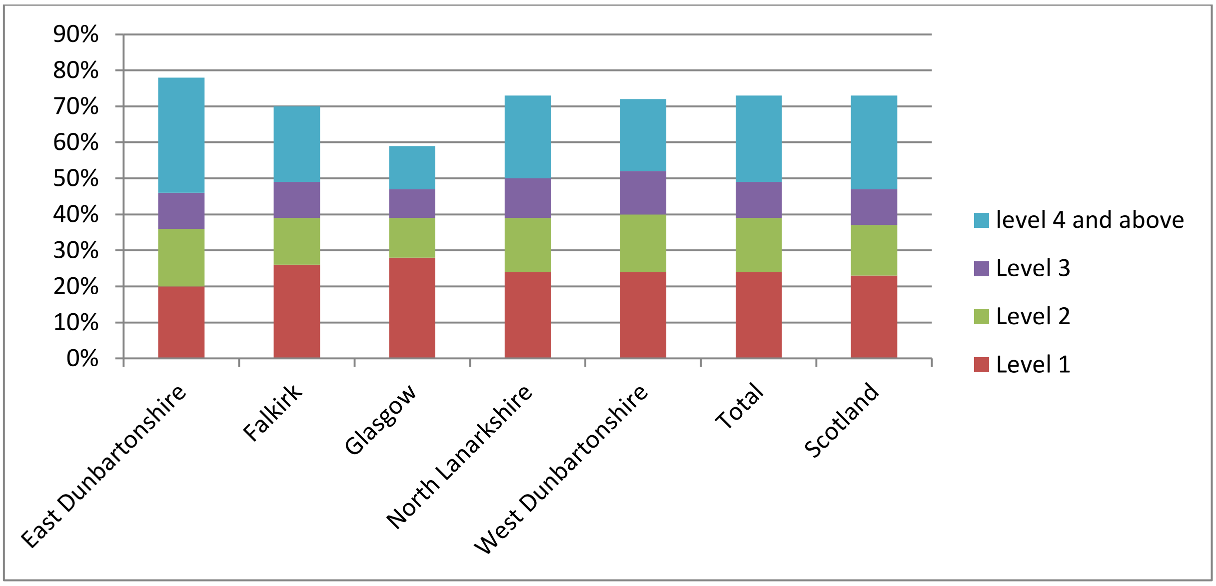
Source: 2011 Census (datazones)

Figure A4: Proportion of Households with no access to a car



Source: 2011 Census (datazones)

Figure A5: Proportion of the working age population with qualifications



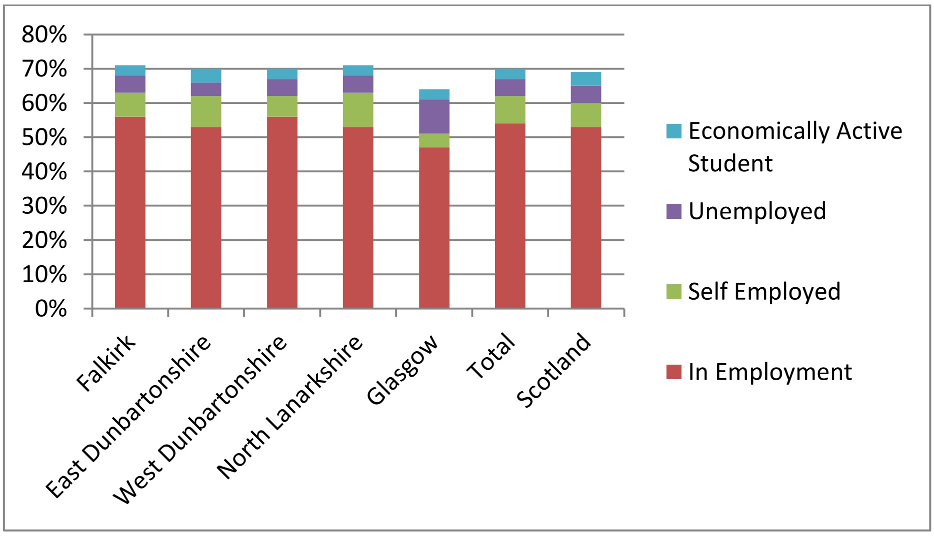
Source: 2011 Census (datazones)

Table A4: Working Age Population Qualifications

	Over 16	No qualification	Level 1	Level 2	Level 3	level 4 and above	full time student
East Dunbartonshire	17,671	22%	20%	16%	10%	32%	12%
Falkirk	29,105	29%	26%	13%	10%	21%	8%
Glasgow	2,740	41%	28%	11%	8%	12%	13%
North Lanarkshire	6,372	26%	24%	15%	11%	23%	11%
West Dunbartonshire	9,620	29%	24%	16%	12%	20%	11%
Total	65,508	27%	24%	15%	10%	24%	10%
Scotland	4,379,072	27%	23%	14%	10%	26%	14%

Source: 2011 Census (datazones)

Figure A6: Economic Activity of Working Age Population



Source: 2011 Census (datazones)

Table A5: Economic Activity Levels

	16-74s	In a jobt	Self Employed	Un-employed	Economically Active Student	Economically Inactive
East Dunbartonshire	15,829	53%	9%	4%	4%	31%
Falkirk	26,093	56%	7%	5%	3%	30%
Glasgow	2,649	47%	4%	10%	3%	35%
North Lanarkshire	5,888	53%	10%	5%	3%	29%
West Dunbartonshire	8,664	56%	6%	5%	3%	30%
Total	59,123	54%	8%	5%	3%	30%
Scotland	3,970,530	53%	7%	5%	4%	31%

Source: 2011 Census (datazones)

Table A6: Number of Businesses within the Wall Buffer Zone

Area	2011	2012	2013	2014	Change 2011-14
East Dunbartonshire	1,905	1,965	1,970	2,050	8%
Falkirk	1,605	1,605	1,600	1,635	2%
Glasgow	145	155	155	165	14%
North Lanarkshire	725	745	755	765	6%
West Dunbartonshire	325	335	345	370	14%
Antonine Wall total	**4,700**	**4,805**	**4,820**	**4,985**	**+6%**
Scotland	192,450	197,760	198,280	203,755	**+6%**

Source: Business Counts, ONS (Intermediate Zones)

Table A7: Businesses by sector, 2014

Industry	AW	%	Scotland
A : Agriculture, forestry and fishing	105	2%	9%
B : Mining and quarrying	0	0%	0%
C : Manufacturing	240	5%	4%
D : Electricity, gas, steam and air conditioning supply	0	0%	0%
E : Water supply; sewerage, waste management and remediation	30	1%	0%
F : Construction	565	11%	9%
G : Wholesale and retail trade; repair of motor vehicles and motorcycles	930	19%	18%
H : Transportation and storage	165	3%	3%
I : Accommodation and food service activities	315	6%	8%
J : Information and communication	245	5%	5%
K : Financial and insurance activities	115	2%	2%
L : Real estate activities	155	3%	3%
M : Professional, scientific and technical activities	850	17%	15%
N : Administrative and support service activities	295	6%	6%
O : Public administration and defence; compulsory social security	65	1%	1%
P : Education	155	3%	3%
Q : Human health and social work activities	315	6%	6%
R : Arts, entertainment and recreation	165	3%	3%
S : Other service activities	260	5%	4%
Column Total	**4,985**	**100%**	**100%**

Source: Business Counts, ONS (Intermediate Zones)

Table A8: Business by Size, 2014

Employment Sizeband	AW	%	Scotland
0 to 4	3,245	65%	64%
5 to 9	815	16%	17%
10 to 19	460	9%	10%
20 to 49	320	6%	6%
50 to 99	85	2%	2%
100 to 249	45	1%	1%
250+	15	0%	1%
Total	**4,985**	**100%**	**100%**

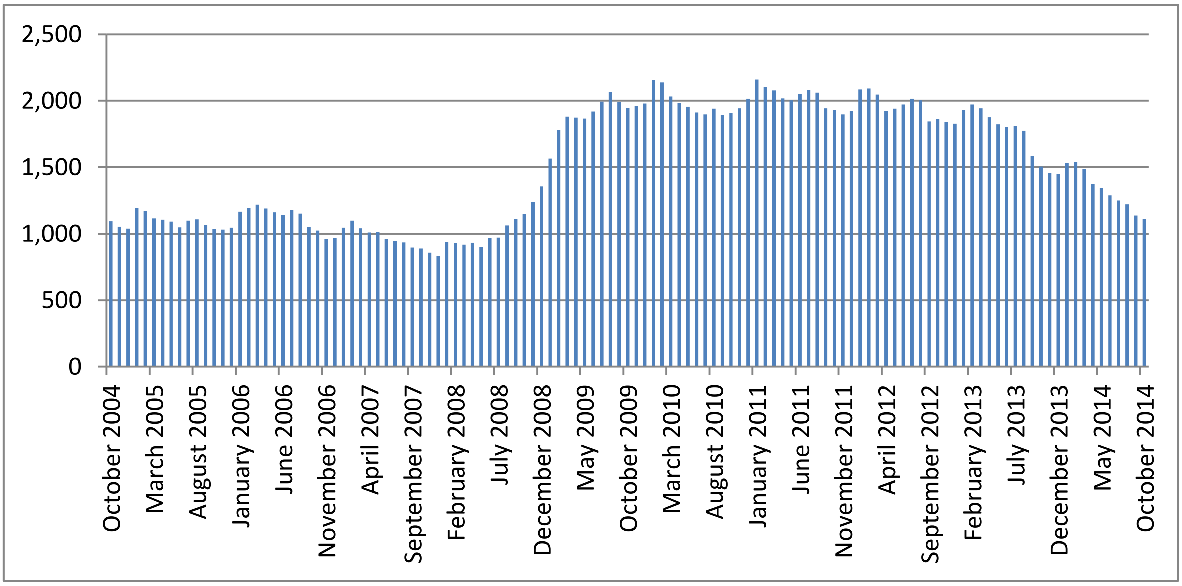
Source: Business Counts, ONS (Intermediate Zones)

Table A9: Tourism related Employment, 2013

	Tourism employment (datazone level)	Tourism employment (Council level)
East Dunbartonshire	500	2,100
Falkirk	2,100	4,000
Glasgow	*	29,200
North Lanarkshire	300	6,200
West Dunbartonshire	300	2,200
Antonine Wall total	3,100	43,700
Scotland		201,400

Source: BRES, ONS (datazones)

Figure A7: Number of People Claiming Unemployment Benefits



Source: Claimant Count, ONS

Appendix 3: Details of the Best Practice Review

Jurassic Coast

The 'Jurassic Coast' of Dorset and East Devon was designated as England's first natural World Heritage Site in December 2001. Running from Exmouth in East Devon to Studland Bay in Dorset, it has 95 miles of exposed coastline showing a sequence through Earth's History covering the Triassic, Jurassic and Cretaceous periods.

Background to the site, its status and overview of investment

The area has long been a tourist destination supported financially by the local authorities from an economic development perspective. There are six local authorities – two county and 4 district.

WHS status has focused funding on supporting a management team. Since Dorset County Council has two thirds of the coastline it provides two thirds of funding (currently £150k) while Devon County Council provides one third (currently £75k) making a total of £225k. This funding has decreased over the past 10 years. Natural England funds a staff member (£30-50k) and the Environment Agency provides £16k a year under a Memorandum of Agreement. Total annual funding is therefore £271-£291k at the current time. In addition there is a small amount of earned income and ad hoc project funding.

Examples of other grant funding received to date include:
2009 - A Pathfinder bid for £376,500 from Defra to work with communities along the coast to prepare for future change.

2014 – A grant of £68,100 from Heritage Lottery Fund (HLF) for Growing the Jurassic Coast Community project employing a co-ordinator to train local people to care for the WHS.

In total, it is estimated that there has been around £15m of capital investment over the period; projects including Durlston Castle, Beach Centre, museums and most recently the Seaton Centre.

Governance and management arrangements

There is a Jurassic Coast Management Team of seven employed by Dorset Council to manage the WHS and deliver the Management Plan.

There is also the Jurassic Coast Trust, established in 2002 as a registered charity governed by a Board of 12 Trustees. The Trust's primary objective is fund raising but the full scope of its activities and aims include:

- Fund raising
- Site access and enjoyment
- Public education

- Conservation for public benefit
- Sustainable economic regeneration

The Trust's annual income has ranged from £59,000 in 2009 to £378,000 in 2010. The Trust itself has no employees though it has had one staff member in the past (2006-09). The Trust is a useful mechanism for fund raising and it also allows the LAs to access grant funding that they would not otherwise be eligible for.

Main socio-economic activities

The management team have developed some projects while partners have independently developed others.

The creation of a 'Jurassic Coast' brand has unified the coastline which was previously marketed under a variety of labels. This is the major achievement of WHS status. The brand is trademarked though the words 'Jurassic' and 'Coast' are not. The management team promotes the site but does not manage individual attractions.

Ten "Gateway Towns" have clearly visible signs on roads and railway stations to show visitors that they are entering the Jurassic Coast World Heritage Site.

In summer, the site is at capacity so promotion has focused on the out of season. Anecdotal evidence suggests that tourism businesses now stay open year round to cater for the increased out of season business. The off-season and poor weather days are promoted for fossil-hunting.

Visitor management activities have included:

- Access including signposting and development of sustainable transport, integrating land and sea. For example, a Jurassic Coast Bus Service connects gateway towns with the World Heritage Site.
- Visitor orientation displays
- Marketing, awareness raising and education providing;
- Safety and visitor infrastructure.

Other activities are as follows:

- There are sixteen different museums/visitor centres and attractions. Many of these are local museums which have been linked together by the JC brand. These include Durlston Country Park and Studland National Trust Visitor Centre on Knoll Beach. The newest attraction is Seaton Jurassic – a £4m visitor centre with aerial views developed to support regeneration of Seaton. The project has secured over £3million from three local authorities plus HLF and other grants. It will open in 2015 with Devon Wildlife Trust appointed as operator.
- The South West Coast Path National Trail - runs the entire length of the Jurassic Coast, offering stunning views and the chance to view the geology up close.
- Boat Trips - allow the geology of the cliffs to be seen from the sea. There are several operators running trips which can be joined at 10 locations.

- Cycle Routes – run along the coast.
- The Arts Program "Creative Coast" has developed 26 projects (2008-2011) with 131 artists, 2,745 participants and direct audience of 70,000.
- Jurassic Coast Business Partner - Including a visitor payback scheme called Investing in the Future.
- Annual Seminar – a free event run by the Jurassic Coast Team and Trust, advertised to Friends of the Jurassic Coast and partners.
- The Big Jurassic Classroom: Free Teacher Training Days
- Ambassadors – local people who can promote the WHS on their doorstep.

Main barriers encountered in developing the site

Getting local authorities and small towns to work together has been the biggest challenge. Towns can be parochial so collective marketing and cross promotion are important.

Developing the off-season trade rather than the summer trade when places are at capacity.

There have been restrictions on accessing the west Dorset coast following a fatal landslide so there are safety issues in some areas which could hit the local economy.

Critical success factors and lessons learned that might be applied to the Antonine Wall

Demonstrating strong partnership is critical in getting funders/investors to support any particular project.

Having a strategic relationship with HLF so that projects are promoted coherently from within the area.

Maintaining enthusiasm of partners who want to work with you by making sure expectations are managed and progress is delivered.

Having a sustainable funding model for management.

Hadrian's Wall

Hadrian's Wall is a Roman frontier built from AD 122-30 by order of the Emperor Hadrian. It is 73 miles long running from Wallsend-on-Tyne in the east to Bowness on the Solway Firth in the west. It was designated as a WHS in 1987, at the same time as Stonehenge, following an approach by UNESCO to the UK government.

Background to the site, its status and overview of investment.

From 2006 an annual budget of around £1.6m was made available - £1.2m from the Regional Development Agencies and £200,000 each from English Heritage and Natural England.

English Heritage's funding to the Hadrian's Wall Trust fell to £167,000 in 2012/13 and again to £139,000 in 2013/14 with the aim of making the Trust self-sustaining.

The annual maintenance cost of Hadrian's Wall is estimated at around £200,000 with each mile of the Wall costing £2,800 per year to maintain.

Now total funding is around £300,000 in total from English Heritage, Natural England and the local authorities; each LA putting £5-£10k each per year.

Examples of other grant funding received to date include those below. RDP funding was secured from 2012 onwards:

Rural Development Programme for England (RDPE) bid for £750,000 to complete the missing link in the Hadrian's Cycleway between Maryport and Allonby.

SITA Trust bid[6] for £537,000 for consolidation and conservation of three sites on the Heritage at Risk register (Great Chesters, Burtholme Beck and Port Carlisle)

RDPE bid for £333,000 to improve WHS and Hadrian's Wall Country awareness through a series of events and marketing.

RDPE bid for £307,000 for interpretation information points, marketing, access, signage and infrastructure improvements

£265,000 bid to HLF for a three year program to enhance community involvement in the world heritage site.

2014 - £250,000 bid for archaeological excavations with community involvement.
http://www.museumsassociation.org/museums-journal/news/26032014-hadrians-wall-trust-to-close -

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[6] To be eligible a bid needs to be in a 3 mile radius of a SITA waste processing facility – the nearest to the Wall being in Glenfarg.

Governance and management arrangements

In the early years following WHS designation, the site was run by English Heritage with limited community involvement. WHS status was seen as an accreditation mark and activities focused on archaeology and conservation.

At that time a World Heritage Site Management Plan Committee was set up to oversee the Wall and bring together the partners: English Heritage, Natural England, the eight local authorities that the Wall passes through and the Northumberland National Park Authority.

In 2006 the Regional Development Agencies (ONE North East and North West RDA) funded a study which recommended a new body to drive forward the WHS as a major tourism attraction for the North. Hadrian's Wall Heritage was formed as a not for profit limited company to support this economic development aim.

The company became the Hadrian's Wall Trust in 2009, achieving charitable status in 2012. This change of status allowed it to access more funding sources. The Trust had wide-ranging aims, but its main funded activity (after staffing) was marketing. Other aims covered:

- Public education
- Improvement of the physical and natural environment of Hadrian's Wall
- Conservation and protection
- Sustainable Development
- Regeneration in areas surrounding Hadrian's Wall

Over its life, the Trust received funding from English Heritage, Natural England, local authorities, the Rural Development Programme for England (RDPE), other trusts, people and businesses. While the Trust was seen to be successful in project fund raising, it had difficulties sustaining core funding for its 20 staff (16 full time and 6 part time). In the financial year to March 2013, the Trust's accounts show a deficit of £1.4m. Unfortunately the Trust was wound up in July 2014 following difficulties in maintaining it financially.

Now Northumberland County Council and the National Park Authority have taken over the staffing responsibility and there are five staff in total: Co-ordinator, Trail Manager, Trail Officer, and two staff on the HLF funded community project. As well as the Management Plan Committee, 6 thematic delivery groups are proposed to take forward different themes covering conservation, education, preservation, marketing etc. For example, local authority tourism officers will be responsible for tourism.

Main socio-economic activities

More than one million people visited Hadrian's Wall in 2011/12. The main activity of the Trust, under RDA funding, was in promoting the area to visitors. The main visitor type is 'empty nesters' interested in the outdoors. Weekend bookings involving good food and drink and outdoor walking are a core market as are families attracted to the central sector of the Wall. The west coast has a focus on cycling and adventure sports.

Activities around Hadrian's Wall are set out below:

PR & Media – the Trust undertook extensive marketing and promotion work to encourage visitors to Hadrian's Wall and the surrounding area including campaigns such as:

- Plan Your Invasion 2007 – cost £126k.
- British Museum: Hadrian Empire & Conflict Campaign 2008 - cost £76k
- The Living Frontier 2009 – cost £40k.
- Historic Carlisle and Hadrian's Wall Country 2009 - Destination awareness.
- Illuminating Hadrian's Wall 2010 - A celebration with 500 lights along the Wall.
- reDiscover Hadrian's Wall Country 2011 - Partnership with VisitEngland to generate brand awareness.
- Connecting Light – part of the Queen's Diamond Jubilee
- VisitEngland Thematic Campaigns
- 2014 exposure in the Government's Regional Growth Fund funded VisitEngland thematic campaigns English Countryside and Romantic Getaways.

Hadrian's Wall Path National Trail – runs alongside the Wall.

Hadrian's Wall Bus – co-ordinated by the Trust and operated by Go North East to integrate with other public transport the bus is increasingly providing a service for locals and might be commercialised in the next 2-3 years.

Cycle Scheme – The Trust provided 56 cycles for hire including 20 electric bikes. Businesses can sign up to become 'cyclist welcome' rest or charge points. This is now operated by Cumbria Leisure.

Hadrian's wall business club – delivers projects and fundraising to benefit the WHS with 2 levels of membership. Use of the Hadrian's Wall Country logo is encouraged.

100 fully trained Hadrian's Wall Country volunteers working on the National Trail, as heritage guides and in conservation tasks

Hadrian's Wall Country Map and Guide - 100,000 copies of the map and 40,000 copies of the guide printed and distributed.

Hadrian's Wall Country app – available from iTunes for £1.99, it has an interactive map, and lots of places of interest. It has had a few hundred downloads.

Website - www.visithadrianswall.co.uk – for visitors with around 40,000 unique visits per month.

Newsletters – monthly for tourism and business partners and an e-newsletter, sent seasonally to 83,000 potential and past visitors. Newsletters are continuing to be sent to businesses to explain the change following the Trust closure and the plans going forward.

Social Media –Facebook and Twitter pages.

Main barriers encountered in developing the site

The size and scale of Hadrian's Wall mean there have been different priorities in different areas and a disjointed approach historically. The wall was broken down into different sites which was confusing for visitors. It has been hard work to bring that together and work needs to continue to maintain that.

Hadrian's Wall is under constant pressure from the weather, visitors, livestock and other factors so a lot needs to be done just to 'stand still'.

Large amounts of funding were provided 'top down' to meet a national agenda but this may have created a lack of local ownership of the strategy. Now the situation is the other way round - local and regional agendas are driving the strategy but with little cash. Yet creativity and a willingness to work together are bringing new optimism.

Small companies find it hard to engage with a large public partnership.

There are regeneration areas along the Wall but engagement in skills development and entrepreneurship is at an early stage.

Critical success factors and lessons learned that might be applied to the Antonine Wall

The business model needs to be financially sustainable within the context of hard pressed public sector budgets. Management costs need to be self-sustaining. There were specific reasons for the Hadrians Wall Trust folding.

There needs to be ownership of the strategy for the Wall from local groups, local authorities and communities.

The Partnership needs to have good communication to all stakeholders – even on small details.

People like to know who is in charge, who is on the Management Plan committee etc. so these details should be easily available to the public.

The partnership needs to be business friendly so that small businesses know where to go to engage and get involved.

There is a need to deliver to meet public expectation – this might be as simple as signage or path improvement – the work on Hadrian's Wall to address areas on the heritage risk register was welcomed by the public.

The Jurassic Coast is seen to be a good model to emulate.

German Limes

The 'Roman Limes' stretched over 5,000 km from Britain, through Europe to the Black Sea, and from there to the Red Sea and across North Africa to the Atlantic coast. Known collectively as the Frontiers of the Roman Empire (FRE) they include the Antonine Wall, Hadrian's Wall and continental Limes.

The German Limes stretch for 550km from the north-west of the country to the Danube in the south-east. With 900 watchtowers and 120 forts the German Limes were designated as a WHS in 2005.

Background to the site, its status and overview of investment

A national budget of €220m was made available for all German WHS with the Limes receiving €6m via joint bids with different states. The Limes run through four states each of which has its own budget. For example in addition to the funding above: Rhineland's annual budget was €100k per year on top of the co-ordinator's salary.
Baden-Württemberg and Hesse had no annual budget. Bavaria set a budget of €1.5m in 2007 including the co-ordinator and took four years to spend it.

Communities can apply for funding but the co-ordinator has overall control of spending. Money is spent in accordance with the development plan but there is little community consultation as the priorities are set by archaeological needs rather than community wants.

In 2007, city mayors were visited to explain funding availability and the need for match funding. Funding levels were set at 30% for signage, 40% for conservation and 50% for community land purchase. In other words local towns would have to come up with the balance of funding. There was also an interpretation budget for museum installations.

Most of the investment has been used for signage and path creation.

Governance and management arrangements

The German Limes Commission (DLK), founded in 2003, is responsible for conservation, research and tourist presentation of the Upper Germanic-Rhaetian Limes. The DLK is funded by the states of Baden-Württemberg, Bavaria, Hesse and Rhineland-Palatinate and North Rhine-Westphalia. For research projects, additional funds are raised.

Local towns are able to bid for funds for specific projects but otherwise, the control is relatively top down.

Main socio-economic activities

The Limestrasse road follows much of the Limes offering vehicle and bike access. In addition the Limes pathway and cycleway have been developed along with greatly enhanced interpretation with one main centre in each state at the largest museum.

The landscapes of the Limes and their Roman heritage offer walking and cycling opportunities with each area having its own rural character.

However, long distance walking is not as popular an activity in Germany as it is in the UK. Further, much of the area of the Limes is rural and fragile suffering long term depopulation and with little tourist culture. This means that tourist development has been slow to take off.

For these reasons, those closest to the Limes would describe the main economic activities as monument preservation, interpretation, signage and access. Some of the best preserved parts have very poor access. Visitor numbers are modest – the new museum opened in 2012 attracting 30,000 visitors, most interested in architecture rather than the German Limes. Numbers fell to 22,000 the following year.

Main barriers encountered in developing the site

Lack of tourist culture in some rural areas of the Limes.
Many rural fragile areas with depopulation restricting local interest in providing for tourists.
Lack of cultural interest in long distance walking in Germany.
Best preserved parts are remote and difficult to access.
Incorrect historical information in some areas which has had to be corrected.
Remit is mainly to protect and interpret the monument, not to promote it.

Critical success factors and lessons learned that might be applied to the Antonine Wall

Signage is vital from motorway right down to the car park.
Can the Wall be added to car navigation systems in the UK?
Need good quality consistent interpretation and ideally an interpretation centre – Regensburg cost €3m, €1.5m for interpretation itself.
There is little community involvement in the German Limes with most decisions being quite top down. In this respect the Wall has advantages given the local community groups who are interested.

Danube Limes

The Danube Limes cross ten countries. A new tourism strategy document is about to be published. The main aim is to increase sustainable tourism. Cycling is popular along the river with a cycle path from Passau to Bratislava and several Roman forts along the route, some with visible remains. There has been quite a lot of effort to promote these recently – for example a statue of Marcus Aurelius erected in the last few years at one fort.

While the relevant Ministries in each country are on board, the key challenge is to get other bodies and mechanisms in place in each country. While everyone thinks it is important (from Ministry level down) there is lots of individualism with not enough consistency in use of the brand for example.

In the Western Limes there are good regulatory mechanisms but no additional funding. As you travel East the regulatory mechanisms get poorer but there is access to lots of EU funding for regional development.

To move matters forward and to improve consistency of approach working groups are needed in each country and an overall steering group/advisory board with representatives from each country.
Need municipalities to ask for advice rather than doing their own thing.

Critical success factors and lessons learned that might be applied to the Antonine Wall?

Need to find a way to show that it is one wall in common with Europe.
Find alternative ways of visualising the Wall using technology such as QR codes
Encourage people to get together and exchange ideas and experience more.
Encourage joint funding bids from right across the Wall.
The Wall could be included in citizenship project funding bid

Appendix 4: Businesses who completed the survey

WDC	Gavinburn cottages
	Cleddens Farm riding stables
	Stevies Super Savers shop
	Lifestyle shop
	Greggs
	Cosy Corner Café
EDC	Douglas Park Golf Club
	Grace & Favour Café
	Welsh Rare Bits
	Capri Gift Boutique
	McGowans Jewellers
	Rose & Grants Café and Deli
	Piccolo children's designer clothing
	Dobbies Milngavie
	Equi-store
	The Tickled Trout
	Castlehill Farm
	Buchley Ecocentre - Coachhouse Trust
	Smiths Hotel Kirkintilloch
Glasgow	Cats Whiskers Tours
	Macs Adventure
	Lambhill Stables
NLC	Outdoor Traxx
	World of wings
	Stoury bothy / Auchinviroch farm, Banton
	Clanranald
	Forth and Clyde Canal Society
	Woodend farm equestrian
	Kilsyth lennox golf club – takmadoon road
	Dullatur golf club
	The port gallery at auchinstarry marina
	Allanfauld wigwams – Kilsyth
	The Coachman Hotel
	The Boathouse
	Castlecary House Hotel
	Westerwood Hotel
	Twechar Farm B&B
	Dobbies Westerwood
Falkirk	Inchyra Grange Macdonald
	Real Roman Tours
	Ashbank Guest House
	Oaklands Bed and Breakfast

	Falkirk Wheel
	Bo’ness & Kinneil Railway
	Bo’ness Motor Museum
	Cladhan Hotel
	Travelodge, Beancross
	Metro Inns, Beancross
	Chianti Italian Restaurant
	Beancross Restaurant with rooms
	Klondyke Garden Centre, Beancross
	Brewers Fayre/Premier Inn, Cadgers Brae
	Falkirk Distillery Company
	Gemini Walks
	Absolute Escapes
	Milnholm Trekking Centre
	Tower Shop
	Falkirk Delivers
Other	David Breeze
	PR Store
	Parthian Systems
	JGM Consulting Ltd

Appendix 5: Economic Impact Modelling Assumptions (Baseline and Future)

Heritage Benefits – Current			Future
Research in Universities	AW is a large segment of 'Roman Scotland' – there are around 13 Roman researchers identified in Scotland at various universities or retired. Most are not concentrated on AW.	We assume a fifth can be attributed to AW activity so 2.6 FTEs at Principal Investigator level. Assume salaries of £60k including on-costs.	Same
	PhD at Canterbury to interpret LIDAR data (laser scanning of wall) just starting	1 PhD stipend for four years (in England). Assume £15k.	Assume a second PhD studying from year 4
	Masters on Camelon leather shoes	2 year part time Masters now complete	Assume one-off not repeated.
	Academic conference tours	50 people, 1 -2 per year including bus hire and meals for a day each	Same
	Publications	Bearsden Excavations due to be published Lots of unpublished excavations to be published in the next 2 years – assume 1.5 per year Various books on AW – very small numbers sold	Assume 12 sold per year. Assume 18 sold per year. Assume 12 sold per year.
	European Association of Archaeology Glasgow 2015 – first time in Scotland 1,500 people.	30 people for a 1 day tour of the AW – take this as typical for a year	Assume one-off not repeated.
	Newcastle University Frontiers of the Roman Empire Digital Humanities Initiative (FREDHI)	Oct 2013 to Sep 2015 0.5 FTE plus Professorial oversight so assume one third is AW (Hadrian's and Limes accounting for other two thirds)	Assume this continues.

Research in Museums	National Museum of Scotland	2006: 1 visit, 1 day 2008: 2 visits, 4 days total (not all on Wall material), assume 3 days 2011: 1 visit, 1 day 2013: 4 visits, 5 days (about 50% of this was Wall material) = 2.5 days Assume 8 days total. 3 of these visitors were local or day return, the other 5 stayed overnight Material studied: pottery (the main category), flue tiles, intaglios, coins, Falkirk tartan	Assume this continues at same level.
International Collaborations FRE	Roman Frontiers 3 yearly conference Exchange visits	350 people from 26 countries Assume AW accounts for a fifth Regular exchange visits to and from Europe – say 21 days per year of visitors to Scotland.	Assume one-off not repeated Assume this continues at same level.
Societies Research			
Local societies	Croy Historical Society; Clydebank History Society	A lot of activity in local historical societies such as Croy. Assume this is equivalent to one FTE £30k per year	Assume this continues at same level.
Companies research	ITV Secrets of the Sky TV episode	Assume 2 day recce for three plus two week stay for production team of five	Assume one-off not repeated
	Commercial archaeology companies	Perform digs in response to commercial developments of which there are very few due to development restrictions. Assume one per year of £3,000.	Assume this continues at same level.
Economic Benefits - Current			**Future**
Tourism, Visitors and spend	Maintained sites at Bar Hill and Croy Hill with Rough	Assume 1,500 – 2,500 visitors based on HS data for maintained sites. Rough Castle is likely to get more given	Assume this continues at same level.

	Castle, and Bearsden	its proximity to the Falkirk Wheel so assume 10,000.	
	Andante Tours	1 tour per year for 50 people spending 1 day on the wall (part of a larger tour)	Assume this continues at same level.
	Real Roman Tours	200+ visitors 2014 as first fully active season	Assume this grows to 1,000 over five years.
	Twechar Healthy Living Centre	Estimate 2 buses of 76 school children per year plus 6 walkers per day related to AW. Also 2 buses of 50 ramblers per year.	Needs investment to grow but assume 4 more buses and increasing number of walkers.
	Croy	Estimate 10 walkers per week on the wall on average.	Assume this continues at same level.
	Dobbies Westerwood	Currently have visitors, 1 coach load of ramblers per year plus 2-3 others per week	Assume this continues at same level.
	Falkirk Wheel	In excess of several hundred visitors this year for AW. Kids guidebook 'A wheely good time' has a good bit of information on the AW. Boats are named Antonine and Archimedes. Roman gifts sell out quickly but nothing AW specific.	Assume grows to 1000 by year 5 with AW gift range.
	AW long-distance walking tour	Requires signage, production of book and map. Assume these costs are included in ongoing expenditure. Assume visitor numbers grow in line with John Muir way.	Increase from 1,000 to 5,000 spending 4 days walking wall.
	People staying to visit AW	More overnight visitors as AW becomes more developed and a car tour is developed.	Increase by 50 per year.
Other Economic activity			
	Historic Scotland annual spend on maintenance of sites	Staffing £140k per year Other maintenance costs £40k per year Total £180k.	Assume this continues at same level.
	AW Management Plan	2012-13 £13,500 made up of	Assume this continues at the

		Management Plan consultation: £5978 Interpretive work (app, signage etc): £7460 2013-14 £53,514 made up of Website £33,900 Content for website and app: £14,833 Management Plan design, print and launch: £3781 Interpretation plan and SEA report : c£1,000 2014-15 £60,750 made up of: Website design and build: £20,195 Website / app content: £19,057 Community Map: £2,000 Economic Study: £19,500	2014/15 level.
	AW Co-ordination	Assume 1 FTE Co-ordinator, 0.1 FTE WHS head, 0.1 FTE Inspector and 0.1 FTE District Architect. Total of 1.3 FTE HS staff. Assume £60k per head including on-costs.	Assume this continues at same level.
	Historic Scotland spend on new interpretation at four sites	£8k for interpretation plus £8k for consents per site so £64k across all four sites over two financial years.	Assume one-off not repeated.
	Bridgeness Slab reconstruction at Bo'ness	Spend of £80k plus lots of community volunteer involvement and Council officer support (completed two years ago).	Assume one-off not repeated.
	Local authority spend	Assume £5-£10k per year capital funding plus staff time of 0.2 FTE per Council per year.	Assume this continues at same level.
	Local authority new major road signage	Falkirk £200k on signage but related to Falkirk Wheel and Kelpies.	Not included
Regeneration	Lots of community activity set out below		

Halo effect of AW, WHS or RFE brand	X limited companies using Antonine brand	No economic benefit recorded.	Not included
	HLF bid		Assume successful £500k bid in year 2.
	Barnardos at Watling lodge	Community initative to help young people - community outreach, training and café. Assume 1 manager and 0.5 staff person. 20% AW. 12 young people trained per year. Day visitor included in other figures. Capital expenditure for café, fencing, interpretation of 20k	Assume starts in year 1.
	Forestry Commission development of fort		Assume one-off not repeated.
Social Benefits - Current			**Future**
Education – local schools, colleges, universities and museums	National Museum	AW gallery plays a part in school visits but only 5 minutes at most.	No benefit recorded.
	Hunterian Museum	Has 84,500 visitors annually and a fifth is AW so assume 16,900 visitors are there for AW.	Assume this continues at same level.
	Callendar House	Has 38,000 visitors annually and an eighth is Roman, though it punches above its weight so assume a fifth or 7,600 visitors are there for AW. Many school groups included. 29 FTEs and again assume a fifth are AW = 5.8FTE.	Assume this continues at same level.
	Kinneil House Museum	Has 2,700 visitors annually and 25% is Roman so assume 675 visitors are there for AW. 0.5 FTE staffing.	Assume this continues at same level.
	Auld Kirk Museum	Has 20,000 visitors annually and 15-20% is Roman so assume 3,500 visitors are there for AW. 25 school visits of 30 or 60 people included in the numbers above. 2	Assume this continues at same level.

		FTE staffing.	
	Summerlee Heritage Centre Library	Has 130,000 visitors but none for AW Has 22,000 visitors and one Roman display so assume 10% and 2,200 visitors are there for AW. Has 23,700 visitors annually and 20% is Roman so assume 4,740 visitors are there for AW. Assume both the above have same staffing as Auld Kirk.	Assume this continues at same level.
	Schools activity	Lots of schools visit their local museum or the wall in their locality so there is a high level of awareness and understanding of AW locally. Schools visits are included in the visitor numbers to museums.	
	British Trust Conservation Volunteers	Seabegs wood board walks installed at a cost of around £2,000 plus volunteer time - assume 35 man hours	Assume this continues plus an additional project each year.
	Barnardo's Works	Assume training of young people on the AW. Assume same level as BTCV.	Assume this continues at same level.
	Polmont Woods	Volunteer time in controlling woodland around the AW. 35 man days per year. Falkirk Council project c£10k.	Assume this continues at same level.
	Wallnuts	Geoff Bailey runs summer digs on the wall. Assume 60k salary, 20 people 2 weeks pro rata.	Assume this continues at same level.
Communities use, festivals, events etc	Big Roman Week Bonnybridge, Falkirk, Polmont and Bo'ness	Assume 2-3,000 visitors over the week.	Assume this continues at same level.
	The PR Store	Currently promote big Roman week pro bono, opportunity to promote other events on the AW	
	Antonine Guard	Estimate 6 days per year on the wall with 6-16 volunteers. Charge	Assume this continues at same

		expenses at maximum of £350 for 2 days. Lots of volunteer time.	level.
	Antonine Trail Race	Held in October. No information on numbers. Assume 100 people involved.	Assume this continues at same level.
Recreation and Leisure	Greenspace Users	There are very significant numbers of people appreciate the greenspace provided by the AW across Scotland's central belt. No numbers are available but likely to be several thousand per year. For example 100,000 people were recorded walking on the canal at various points. 80,000 people live in area assume a third of the greenspace value is attributed to AW space from National Ecosystem Assessment.	Assume this continues at same level.