

Lossiemouth East Beach Bridge Replacement

Economic Impact Assessment

by

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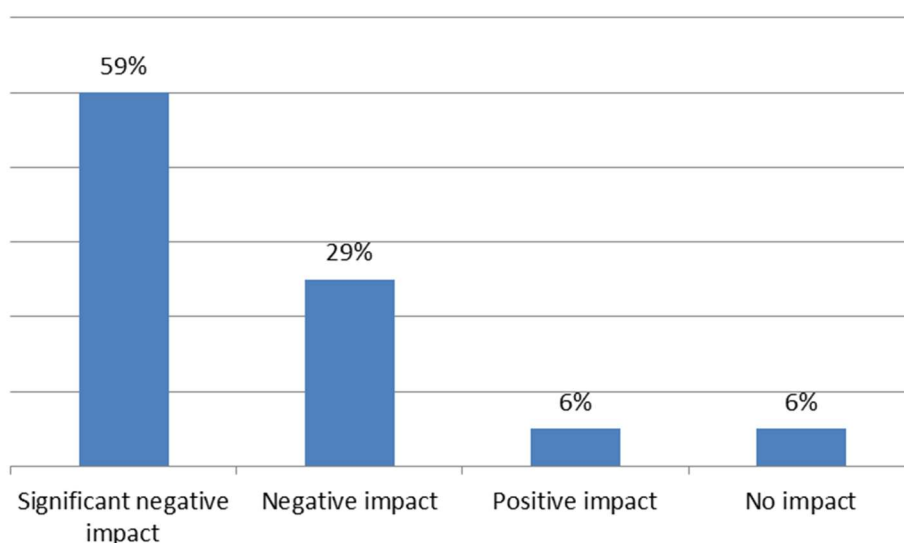
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Executive Summary

- E1 This Economic Impact Analysis (EIA) values the economic impact that the Lossiemouth community derives from the East Beach (with access), and considers two options: 1. Do nothing; and 2. Replace the existing bridge. The EIA demonstrates the impact each would have in terms of visitor spending, employment and public well-being. The EIA also considers potential projects/actions that could be taken forward by the community to ensure that the community maximises benefits after the bridge has been replaced, and potential sources of future financing to implement these projects/actions are indicated.
- E2 The Options Appraisal has been produced for Moray Council by Beaver Bridges, and this identifies the best value option for replacing access to the East Beach as a new bridge from the Esplanade – the shortest crossing of the options considered. The cost of this option is given as £1,375,000 capital cost plus £165,000 net present value maintenance cost over 60 years = £1,540,000.
- E3 Our initial research included: identifying all relevant accommodation providers and other key tourism related businesses and activities in Lossiemouth; accessing 2019 bridge count statistics compiled by Lossiemouth Community Development Trust; and reviewing accommodation occupancy survey and visitor spend data from VisitScotland and other sources.
- E4 We circulated an online survey to 180 businesses on 21st December 2020 via the Lossiemouth Business Association (LBA), and this was completed by 50 businesses within 4 weeks. Follow up telephone interviews were conducted with 17 businesses identified with LBA as being highly impacted by the bridge closure and to ensure input from a range of businesses types.
- E5 72% of business respondents reported a negative impact on their trade from the closure of the East Beach bridge, including 26% who had experienced a significant negative impact. Walking distance from the existing bridge is a key factor.
- E6 Without a replacement bridge, respondents located within 5 minutes' walk of the existing bridge anticipated the reductions in turnover (net of inflation) illustrated below between 2018, the last full year prior to bridge closure, and 2022, assuming that Covid-related impacts have subsided and that the bridge has been replaced. 19 of the 21 businesses within 5 minutes' walk of the bridge reported an expected risk of closure, reduction in staffing, and/or reduction in opening hours or season.



- E7 Whilst just over a third (38%) of businesses told us they have developed plans for expansion or are considering expansion, three quarters (76%) said that a high quality bridge replacement would influence their future investment or expansion plans to some degree.
- E8 Based on bridge usage statistics and our survey and other research, we estimated the following difference in attributable visitor spend in a typical year with and without a replacement bridge. The spending of local residents (50,000 estimated East Beach visits per year) is not included in the impacts below.

Estimate of Visitor Spend Attributable to the East Beach in a Typical Year			
	Approximate numbers per year	Estimated average spend per day	Total spend per year (including VAT)
Day trippers	120,000	£5	£600,000
Overnight visitors	30,000	£30	£900,000
Total	150,000		£1,500,000

- E9 From other impact studies using actual visitor spend and employment data, we estimate that an appropriate ratio of Full Time Equivalent (FTE) employment (direct, indirect plus induced) to visitor spend for the Lossiemouth economy (with a number of small and family businesses) would be 1 FTE to £50,000 of visitor spend (inclusive of VAT where applicable). This would give an annual total of **c30 FTEs** (full time equivalent jobs, including proprietors) generated in Lossiemouth **from visitor spend of £1,500,000**.
- E10 From our discussions with those businesses that would potentially lose the most trade without a replacement bridge, combined with our online survey data, we calculate that they expect a total difference of an estimated £1.4 million per year – which (allowing for some over-estimation) is consistent with our £1.5 million estimate when direct plus indirect employment related to businesses not included in the total for these businesses and induced impacts are added.
- E11 Our analysis of available bedspaces, occupancy rates by accommodation type, and attribution of East Beach visits endorsed the spend impacts summarised above.
- E12 Health and wellbeing benefits of the East Beach have included walking or running along the beach, dog walking, watersports, and wildlife and bird watching from the beach and the dunes behind the beach. A wider footbridge (3.5 metres is planned) would increase the accessibility of the East Beach to those in wheelchairs and could enable easier transfer of watersports equipment.
- E13 Annual impacts with a new bridge in place, subject to continuing annual maintenance as advised in the Options Appraisal, could significantly increase from the 200,000 annual visits, £1.5 million attributable visitor spend, and 30 additional FTE years estimated above through a combination of the following factors:
- Business investment, particularly across the accommodation sector through providing additional bedspaces – encouraged by the confidence that a new well maintained bridge will provide in the sustainability of future visits to Lossiemouth, plus new events and activities over the year that will attract additional day and overnight visitors to the East Beach and the town more generally.

- Visits by people who move to live in the new housing to be built to the north of Elgin related to the increased employment and activity at RAF Lossiemouth.
- Marketing initiatives that it will be possible to introduce once the bridge is again available – especially around the celebrations that could accompany bridge re-opening.
- Activities on the East Beach and in the sea for people of all ages (including those with disabilities) that Friendly Access with its proposed surf therapy centre, H2O Watersports Instruction, Outfit Moray and others will be able to develop with improved bridge access – helping to establish Lossiemouth East Beach as a regional centre for beach and sea-related activities.

E14 Even before taking into account the factors in E13 above that would increase annual impacts from those estimated in E9, the difference in annual visitor spend of c£1.5 million in an average year between constructing a new bridge and not having bridge access to the East Beach is considered very good value for money. After 5 years, for example, additional visitor spend in Lossiemouth totalling at least £7.5 million compares with a bridge build plus maintenance cost of less than £1.5 million (see E2 above).

E15 More than 40 new projects or activities that would be complementary to replacing the bridge were given by survey respondents and through our telephone interviews; and our report lists these under the following categories:

1. Signage and information.
2. Development of the surrounding area and heritage trails.
3. Additional “seaside” attractions and equipment.
4. Accessible changing facilities, which would support Friendly Access and SurfABLE Scotland in offering fully adaptive surf therapy through providing watersports and adventure activities to children and adults with disabilities or other conditions.
5. Traffic management and parking.
6. Marketing and promotion.
7. Events.
8. Support for businesses.
9. Take-away food & drink options.

E16 A very wide range of funding sources would potentially be available for such developments, and the report notes some of particular relevance currently – although these could increase or change their focus through supporting the national recovery from Covid-related impacts.

1 Introduction

The town of Lossiemouth on the north east coast of Scotland in Moray benefits from an attractive coastal location with sandy beaches to the west and east of the town. Access from Lossiemouth town to its east beach is by a wooden footbridge, which was constructed by the then harbour authority in 1906. In July 2019, a central span of this bridge failed, and the bridge was closed in the interest of public safety. In September 2019, Scottish Government committed to funding a replacement bridge, subject to a business case, which includes an Options Appraisal and this Economic Impact Assessment.

The overall business case is being produced by Moray Council, in partnership with the Lossiemouth Community Development Trust (LCDT), the Lossiemouth Business Association (LBA), Lossiemouth Community Council and Highlands and Islands Enterprise. The Options Appraisal has been produced for Moray Council by Beaver Bridges, and this identifies the best value option for replacing access to the East Beach as a new bridge from the Esplanade – the shortest crossing of the options considered.

The cost of this option is given as £1,375,000 capital cost plus £165,000 net present value maintenance cost over 60 years = £1,540,000.

1.1 Scope

This Economic Impact Analysis (EIA) values the economic impact that the Lossiemouth community derives from the East Beach (with access), and considers two options: 1. Do nothing; and 2. Replace the existing bridge. The EIA demonstrates the impact each would have in terms of visitor spending, employment and public well-being.

The EIA also considers potential projects/actions that could be taken forward by the community to ensure that the community maximises benefits after the bridge has been replaced, and potential sources of future financing to implement these projects/actions are indicated.

1.2 Methodology

Our methodology included primary and secondary research as detailed below:

1. Scoping meeting with the Project Steering Group
2. Initial research, including:
 - a. Online research into accommodation providers and other key tourism related businesses and activities in Lossiemouth, supplemented by information provided by the LBA on its members and other local businesses
 - b. 2019 bridge count statistics compiled by Lossiemouth Community Development Trust (LCDT)
 - c. VisitScotland Accommodation Occupancy Survey, 2018 and 2019
 - d. STEAM Final Trend Report for Visit Moray Speyside, 2009-2019 – Global Tourism Solutions (UK) Ltd
3. Consultation:
 - a. Online Survey completed by 50 business
 - b. Follow up telephone interviews with 17 key businesses
4. Analysis of survey results and our wider consultation findings, and compilation of this report and appendices with supporting information

Throughout our study we have liaised with members of the project steering group, which comprises representatives from the following groups:

- Lossiemouth Business Association – has members from a variety of businesses within the town and includes a Tourism sub group focused on initiatives to attract tourism
- Lossiemouth Community Development Trust - has charitable status and was formed to represent and promote plans for residents and tourism by adopting a joint community approach towards improving facilities for the benefit of everyone
- Lossiemouth Community Council – the statutory body representing the town
- Moray Council
- Highlands and Islands Enterprise (HIE)

2 Background

Lossiemouth, often referred to as “the jewel of the Moray Firth”, is located at the most northerly point of the south coast of the Moray Firth at the mouth of the River Lossie. The town is popular with tourists and is also home to RAF Lossiemouth, which supports significant local employment. It has a population of around 7,700.

Lossiemouth’s east beach is predominantly characterised by a large strip of sand dunes separated from the rest of the town by the River Lossie. The town looks down on this and the existing wooden footbridge, offering a natural viewpoint to the most photographed beach in the whole of the UK last year, and in the top 50 in the world on Instagram.



<https://www.northern-scot.co.uk/news/moray-beach-most-instagrammed-in-uk-during-2020-223424/#:~:text=Lossiemouth's%20East%20Beach%20was%20the,beaches%20across%20the%20entire%20globe.>

Visit Moray Speyside’s website has the following summary for Lossiemouth:

“The West is dominated by the iconic Covesea Lighthouse, while the East meets the town at the River Lossie and offers stunning views of the iconic old wooden bridge”.

As demonstrated in Appendix E, most Lossiemouth accommodation businesses highlight the East Beach in their online publicity; and the East Beach is Trip Advisor’s No 1 attraction in Lossiemouth.

The east beach has traditionally been a popular location for surfers, and is part of the Moray Coastal Trail, a popular walking route. For local residents *“the East beach is one of Lossiemouth’s greatest*

assets”, “East beach is the high point of our beautiful town”, stated two of our online survey respondents.

Since closure of the existing footbridge, direct access to the beach has not been possible from the town. There is no alternative signed access to the east beach, although 3 miles east of the town, the beach can be reached through Lossie Forest, following a mile of uneven forestry track road and a 5-10 minute walk through the forest. This is not a signposted or pathed route to the beach.

Lossiemouth’s west beach is approximately 3 miles from the east beach and is approximately 3 miles long, running along the length of the popular and highly regarded Moray Golf Club’s two courses to Covesea Lighthouse and Silver Sands Caravan Park. Limited parking is available, and is extensively used by golfers and camper vans, however the tidal nature of this beach often makes the car park inaccessible at high tide. There is a small cafe with limited toilet facilities serving the west beach.

A number of accommodation businesses in Lossiemouth, and other businesses in the town that benefit from visitor spend, have been protected from the significantly reduced viability in late 2019, 2020, and early 2021 that would have resulted from East Beach bridge closure and reduced visitor spend due to Covid through spending by workforces related to major construction contracts for RAF Lossiemouth expansion and the building of a new Lossiemouth Academy. The cost of the airport revamp since January 2020 has been around £75million, and the new Academy will have cost c£42m. Thus, the business base in Lossiemouth should be strong enough once the new bridge is in place to achieve the levels of impact through East Beach visitor spend that we estimate in this EIA – with additional future trade from the eventual expectation of up to 1,500 homes, a new primary school, and commercial land for shops and other businesses expected to be built on land related to the RAF Lossiemouth expansion to the north of Elgin over the next twenty years. The arrival of the new P-8 Poseidon fleet at RAF Lossiemouth could increase the local population by about 4,000, including the spouses and children of forces’ families – although this will include developments, such as in Findrossie, that expand Elgin rather than being in the Lossiemouth area as defined for this EIA.

3 Consultation

We circulated an online survey to 180 businesses on 21st December 2020 via the Lossiemouth Business Association (LBA), and this was completed by 50 businesses within 4 weeks. Follow up telephone interviews were conducted with 17 businesses identified with LBA as being highly impacted by the bridge closure and to ensure input from a range of businesses types.

3.1 Online survey findings

Respondent profile

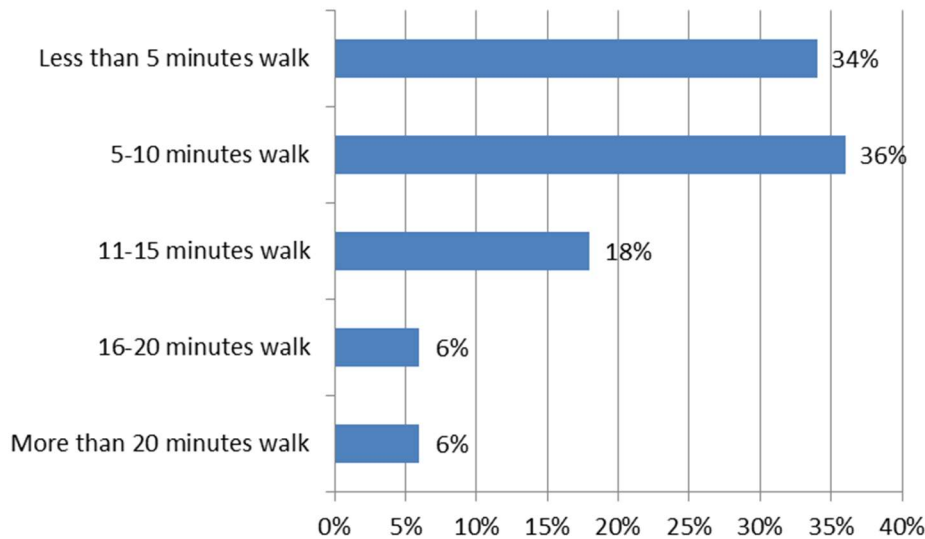
A broad range of businesses responded to the online survey, with the greatest number of responses from retail businesses. Table 1 below summarises these results, with respondents asked to describe their type of business from a number of pre-defined categories.

Table 1: Online Survey Respondents

Business Type	Number of online survey respondents	% of total responses
Serviced accommodation - With catering for their residents only	3	6%
Serviced accommodation - With catering also for non-residents	3	6%
Un-serviced accommodation	2	4%
Caravan/motorhome/camping site	3	6%
Restaurant/café/pub	3	6%
Takeaway food	1	2%
Retail - Highly geared to visitor trade	1	2%
Retail - Visitor trade of some importance	5	10%
Retail - For visitors and local residents, but visitor trade important	8	16%
Supplier to local businesses that serve visitors	5	10%
Recreational - With retail and/or catering sales to visitors	2	4%
Recreational - Without such sales to visitors	3	6%
Cultural - Without such sales to visitors	1	2%
Other (incl. other retail businesses not covered above)	10	20%
Total	50	100%

Respondents varied in distance from the existing east beach bridge, but the majority (60%) were located within 10 minutes' walk, as illustrated in Figure 1 below:

Figure 1: Distance from bridge



Impact of East Beach bridge closure on business trade

Figure 2 below shows that 72% of businesses reported that the closure of the east beach bridge has had a negative or significant negative impact on their business trade, whilst just 2% have experienced a positive impact (due to their location and some people using the west beach rather than the east beach). It is appreciated that there will have been a tendency for negatively affected businesses to respond to the survey, and we have taken account of the nature and scale of these respondents in our quantification and other analysis of bridge closure impacts rather than grossing up the survey results from 50 to 180 businesses.

Figure 2: Impact of bridge closure on business trade

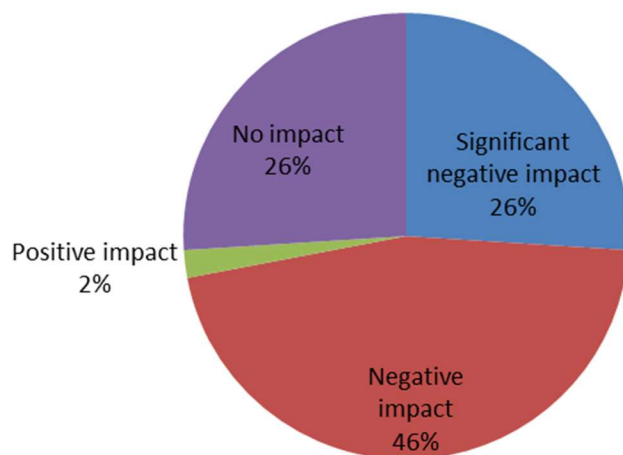
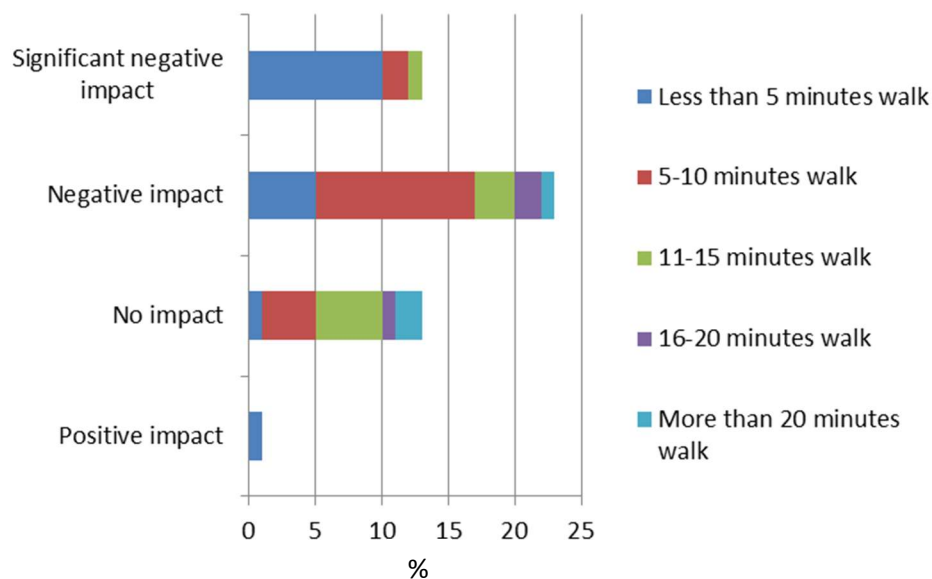


Figure 3 shows that the closer their proximity to the bridge, the greater the level of impact on responding businesses.

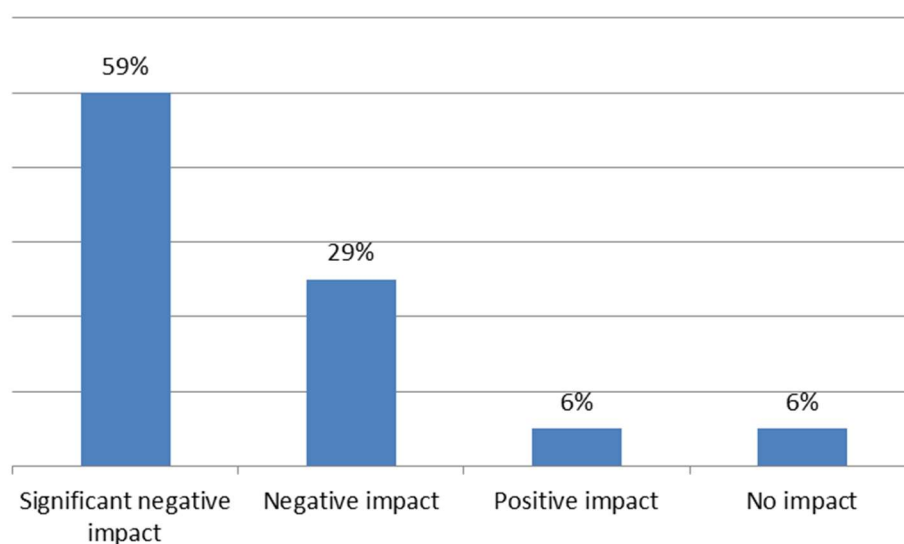
Figure 3: Impact of bridge closure on business trade by distance from existing bridge



Focus on businesses within 5 minutes' walking distance of the existing East Beach bridge

Figure 4 shows that 59% of businesses within 5 minutes' walk of the bridge have experienced a significant negative impact on business trade.

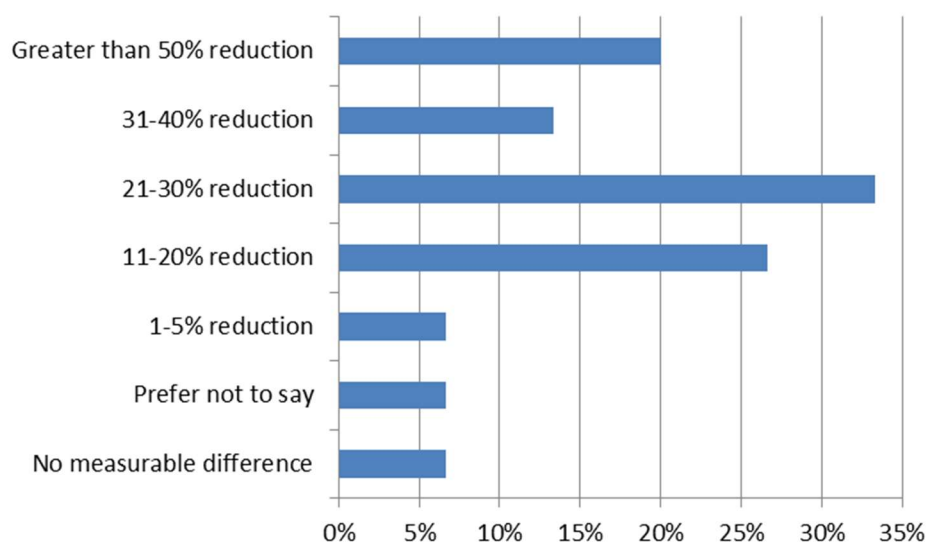
Figure 4: Businesses within 5 mins walk - Impact of bridge closure on trade



Expected change in turnover without a replacement bridge

Respondents were asked to compare what they would expect their turnover to be in 2022 without a replacement bridge (assuming that Covid-related impacts have subsided and that the bridge has been replaced) against their turnover in calendar year 2018 (net of inflation); i.e. the last full year prior to bridge closure. There was a large variance between responses, but, of the businesses that were less than 5 minutes' walk from the bridge, almost all (88%) anticipated experiencing a reduction in turnover, as shown in Figure 5 below.

Figure 5: Anticipated turnover reduction



Risk to businesses without a replacement bridge

Figure 6 shows that the closer a business is to the existing east beach bridge, the greater their anticipated risk should there be no replacement bridge. 19 of the 21 businesses within 5 minutes' walk of the bridge expected risk of closure (high, medium or low), reduction in staffing, and/or reduction in opening hours or season.

Figure 6: Risk to businesses without a replacement bridge

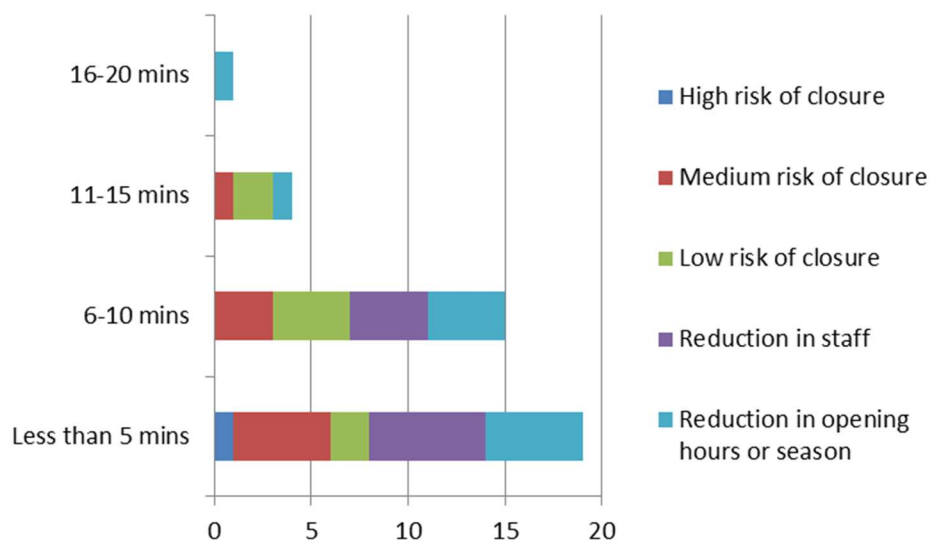
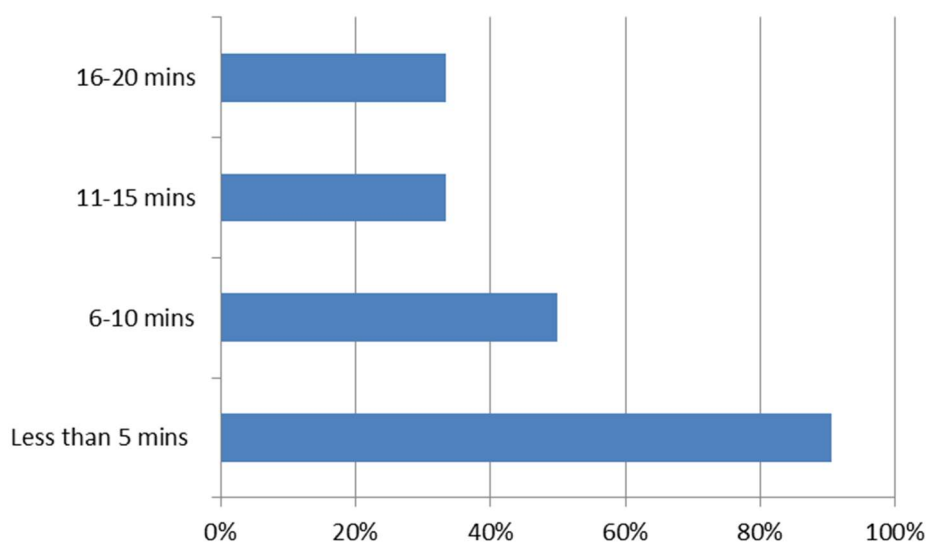


Figure 7 shows that the percentage of businesses anticipating at least one of these risks reduces the further away from the bridge they are.

Figure 7: Percentage of businesses anticipating at least one risk



Expansion plans

Whilst just over a third (38%) of businesses told us they have developed plans for expansion or are considering expansion, three quarters (76%) said that a high quality bridge replacement would influence their future investment or expansion plans to some degree.

Figure 8: Were you planning to expand your business?

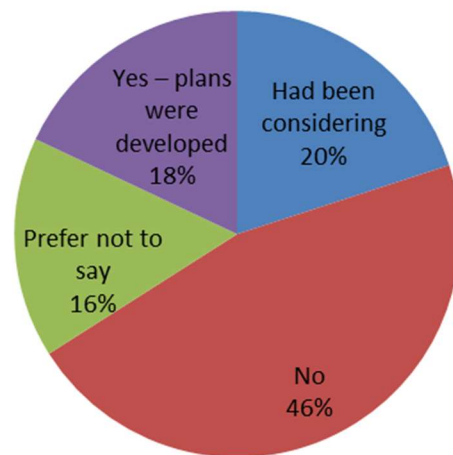
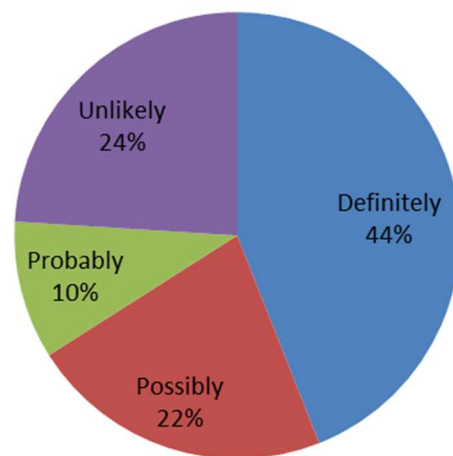


Figure 9: Do you think a high quality replacement bridge would influence your future investment or expansion aspirations?



Our interviews with key businesses gave us supplementary information on impacts to that which these businesses provided through completing the online survey.

3.2: Telephone interview responses

Background

- 20 businesses were contacted to undertake a telephone interview
- Contact was successfully made with 18 businesses
- 14 full interviews were conducted and key information captured for a further four.

These 18 businesses comprised:

- 3 serviced accommodation providers
- 2 un-serviced accommodation providers
- 2 caravan/ camping/ motorhome sites
- 3 restaurants/café/pub
- 4 retailers
- 1 supplier to local businesses
- 3 recreational operators

Impact of bridge closure

Almost all businesses expressed how the closure of the east beach bridge has adversely affected their business.

- **Retailers** - The impact was significant for retailers highly geared towards visitor trade; one advised 70% of customers in summer are holidaymakers. Amongst these businesses the reduction in sales immediately after bridge closure ranged from 25% to over 50%. For these largely seasonal businesses, their customer base *“relies on pull factor, and access to the east beach is the pull factor”*. One respondent believed that without a bridge, *“eventually the shops will not be viable, leaving a dead zone”*
- **Restaurant/ café/ pub category** - one respondent stated that they *“definitely traded down 20-25% in August and September after the bridge closed”*
- **Accommodation providers** that took part in the telephone interview had not been impacted to the same extent as other business categories. This was due to repeat customers, walkers, and the large number of business customers for whom access to the east beach is not a critical factor.

4 Economic Impacts

4.1 Methodology

In order to estimate the difference in economic impact in Lossiemouth between replacing and not replacing the bridge to the East Beach, we used two methods, which, as shown below, gave us broadly the same impacts:

(i) Estimating the number of East Beach users in a typical year attributable to the access provided by the bridge; estimating the breakdown of this total across local residents, overnight stay visitors in Lossiemouth, and day trippers (from elsewhere in Moray and further afield, including tourists); estimating the average spend in Lossiemouth by overnight stay and day trippers attributable to their East Beach visit; and estimating the employment impact from this in FTEs (full time equivalent jobs).

This FTE employment impact measure includes “direct” jobs in Lossiemouth businesses supported by visitor spending (including proprietors and employees), “indirect” jobs in Lossiemouth generated through the local supply chains of these businesses that benefit from direct spending; and “induced” jobs in Lossiemouth generated by the spending of direct plus indirect proprietors and employees from their additional income.

(ii) Drawing on information and estimates provided to us by Lossiemouth businesses who benefit from visitor spending on the difference in spend that they would expect between 2018 (the last full year with an operational bridge, which was broadly typical of recent years), and the first full year should there not be a replacement bridge and without Covid-related impacts (although a full recovery in tourism and day visits – including international trade – could take a few years). Also, based on our consultation and assumptions of spend on related development and marketing initiatives (see Section 5 below), the potential impacts in a medium term typical year with a replacement bridge were also considered.

Businesses gave us some information on their staffing (including themselves as proprietors and their families), the relationship between staffing and turnover, recent customer numbers and how these have changed since bridge closure (acknowledging that 2020 has been an exceptional year), and how failure to replace the bridge might affect their overall future viability.

Estimates of reduced visitor spend between 2018 and a future year without a replacement bridge drawn from aggregating the data provided to us by businesses was then supplemented by estimating the reduced spending in other businesses in specific and miscellaneous sectors of employment in Lossiemouth that will have benefited from visitor spending.

Attribution of impacts is not straightforward as many East Beach visitors will spend time elsewhere in Lossiemouth during their day, in addition to spending money in local businesses, related to their time in the town mainly for leisure purposes (e.g. walking around the harbour, visiting the west beach and/or Covesea Lighthouse, etc). Some of these visitors (as in 2020) will continue to visit without the East Beach option – although, to counterbalance this, the overall attraction of Lossiemouth as a place to visit for some will have included their experience from previous visits to

the East Beach even where (e.g. because of the weather or lack of time) they might not always include an East Beach visit having chosen to spend leisure time in Lossiemouth.

These effects are accounted for in our visitor spend estimates by attributing only a proportion of an average day trip visitor's spend in the town to their East Beach visit. As an approximation, a high proportion of the spending over up to 24 hours of an overnight stay visitor who visits the East Beach on a particular day is attributed as this is considered broadly balanced where people spending more than one night in local accommodation might, on some days, be in Lossiemouth without visiting the East Beach or visit other places (distilleries, castles, visitor attractions, Elgin for shopping, etc).

Without East Beach access, the additional nights in local accommodation related to these non-East Beach days might instead have been in other places (e.g Hopeman, Cullen, Elgin, etc).

Impacts for local residents' visits to the East Beach are not included in the impact totals (which is the usual convention in impact analysis) – although these visits will often entail associated spend in cafés, restaurants, ice cream purchases, etc, that would have accrued elsewhere had they visited beaches in other places without the East Beach option.

Our consultation and analysis suggests that the new bridge proposed as the preferred option from the Esplanade will have broadly similar economic impacts to a replacement bridge close to the existing bridge provided that traffic management and parking provision do not constrain visits to the East Beach.

Indeed, if the now unusable but still iconic existing bridge is not demolished and kept safe, photographing it without a new bridge next to it will be more attractive than with the replacement bridge being closer to the sea.

4.2 Visitor spend and related employment impact

The bridge count data provided to us by LCDT for the early summer season 2019 (before bridge closure) indicates total annual East Beach users over a typical year of c200,000. The counts showed the following:

Bridge count dates	Daily Average crossings to the Beach
24 th March – 25 th March 2019	425
1 st April – 30 th April 2019	590
1 st May – 31 st May 2019	346
17 th June 2019	704
Daily Average	516

April included Good Friday with 2,116 visitors.

Grossing-up pro rata would give an annual total of 188,340 visits. Given, however, that peak season East Beach usage on a typical day will be much higher than these averages, it is considered that an annual average for a typical year would be c200,000 visits (including multiple visits by many people).

From speaking to people who observe East Beach usage over the year, it is estimated that c50,000 of these 200,000 assumed annual visits are by local residents – including people living beyond

Lossiemouth but who use the beach (e.g. for dog walking) without spending any money in the town before or after their visit.

Of the remaining 150,000 assumed East Beach visitors, we estimate from the information we have obtained and the people we have consulted, that c30,000 of these visitors will stay overnight in Lossiemouth the night before and/or the night after their visit, and that c120,000 will be day trippers.

Conservatively, an average spend of £5 per person per day visit is attributed below to day trippers (including children), and £30 in Lossiemouth to overnight stay visitors.

VisitScotland data gives average spend from day trips of all kinds in 2019 in Scotland of £43; and in the North of Scotland of £54. Visit England data shows an average spend by day trippers to seaside destinations of £33, an average spend of £23 for day trippers who undertook an outdoor leisure activity (including walking and cycling), and £37 for day trippers on general days out/to explore an area.

VisitScotland data for the Highlands for 2019, based on the International Passenger Survey and the Great Britain Tourism Survey, shows an average spend of £67 per 24 hours by overnight stay visitors. Figures for Moray are not available, but STEAM data indicate average spend by overnight visitors to Moray Speyside averaging £42 in 2019 (as calculated from its summary data).

Estimate of Visitor Spend Attributable to the East Beach in a Typical Year			
	Approximate numbers per year	Estimated average spend per day	Total spend per year (including VAT)
Day trippers	120,000	£5	£600,000
Overnight visitors	30,000	£30	£900,000
Total	150,000		£1,500,000

Employment Impact

From other impact studies using actual visitor spend and employment data, we estimate that an appropriate ratio of Full Time Equivalent (FTE) employment (direct, indirect plus induced) to visitor spend for the Lossiemouth economy (with a number of small and family businesses) would be 1 FTE to £50,000 of visitor spend (inclusive of VAT where applicable). This would give an annual total of **c30 FTEs** (full time equivalent jobs, including proprietors) generated in Lossiemouth **from visitor spend of £1,500,000**.

From our discussions with those businesses that would potentially lose the most trade without a replacement bridge, combined with our online survey data, we calculate that they expect a total difference of an estimated £1.4 million per year – which (allowing for some over-estimation) is consistent with our £1.5 million estimate when direct plus indirect employment related to businesses not included in the total for these businesses and induced impacts are added.

4.3 Visitor nights and visitor spend

For validation of the above assumptions, our sources of information on all visitor nights and associated spend in Lossiemouth included:

- Our review of accommodation providers
- Visit Scotland occupancy rates
- Our occupancy analysis based on our online and interview surveys

Our calculation of visitor nights in Lossiemouth relates to the following accommodation types: hotels, bed & breakfasts, and self-catering (including rental static caravans). Visitors staying with friends and relatives are not covered.

A review of major online booking accommodation sites (Booking.com, Airbnb and Trip Advisor) shows that there are at least 116 bedrooms available in serviced accommodation (hotels and bed & breakfasts), 70 self-catering accommodation units (including Airbnb) and 44 static caravans for visitor lease for potential East Beach visitors.

Accommodation Type	Total number	Total number of bedrooms	Total number of beds
Hotels	4	90	181 (est)
Bed & Breakfasts	4	16	37 (est)
Self-Catering Units	70	138	300 (est)
Static Caravans	44	c100+	150 (est)
Totals	122	344+	668+

Applying the VisitScotland average occupancy rates for 2019 below to the total number of beds across the year enabled us to estimate (broadly) total visitor nights.

Accommodation Type	VisitScotland Average Occupancy %
Hotel Bedrooms	71%
Hotel Beds	53%
Bed & Breakfast Bedrooms	50%
Bed & Breakfast Beds	42%
Self-Catering Units and Caravans	48%

Applying these bed occupancy rates over 350 days for serviced accommodation and 250 days for self-catering units and caravans gives:

Hotel beds occupied	33,576
Bed & breakfast beds occupied	5,439
Self-catering and caravan visitor nights	54,000
Total	93,015

Taking account of other overnight markets – for golf, the marina, west beach and lighthouse visits, business visits, etc – it is considered that an estimate of 30,000 East Beach visits by people staying overnight in Lossiemouth is consistent with this total.

4.4 Longer term economic impacts

Annual impacts with a new bridge in place, subject to continuing annual maintenance as advised in the Beaver Bridges Options Appraisal, could significantly increase from the 200,000 annual visits, £1.5 million attributable visitor spend, and 30 additional FTE years estimated above through a combination of the following factors:

- Business investment, particularly across the accommodation sector through providing additional bedspaces – encouraged by the confidence that a new well maintained bridge will provide in the sustainability of future visits to Lossiemouth, plus new events and activities over the year that will attract additional day and overnight visitors to the East Beach and the town more generally.
- Visits by people who move to live in the new housing to be built to the north of Elgin related to the increased employment and activity at RAF Lossiemouth.
- Marketing initiatives that it will be possible to introduce once the bridge is again available – especially around the celebrations that could accompany bridge re-opening.
- Activities on the East Beach and in the sea for people of all ages (including those with disabilities) that Friendly Access with its proposed surf therapy centre, H2O Watersports Instruction, Outfit Moray and others will be able to develop with improved bridge access – helping to establish Lossiemouth East Beach as a regional centre for beach and sea-related activities.
- The post-Covid surge in “staycations” that is expected; with people spending more time away to compensate for being inactive in 2020 (and probably for much of 2021) and with money to spend that they have saved during the period of reduced holiday, day-trip, and retail spend.

4.5 Value for money

Even before taking into account the factors in 4.4 above that would increase annual impacts from those estimated in 4.2, the difference in annual visitor spend at c£1.5 million in an average year between constructing a new bridge and not having bridge access to the East Beach is considered very good value for money. After 5 years, for example, additional visitor spend in Lossiemouth totalling at least £7.5 million compares with a bridge build plus maintenance cost of less than £1.5 million.

4.6 Physical and social outcomes

4.6.1 Health and wellbeing

Positive aspects of the physical and social environment in which we live that can nurture health and wellbeing include:

- contact with nature in everyday life
- feelings of safety
- the ability to move around places easily and safely on foot or by bike
- a sense of belonging and a sense of control
- thriving communities with an abundance of local businesses and good access to job opportunities

(<http://www.healthscotland.scot/health-inequalities/impact-of-social-and-physical-environments/place/place-overview>)

Without access to the east beach, many local residents, particularly those living in close proximity to the beach, have lost a part of their daily life and routine and access to activities which improve health and wellbeing, including: walking or running along the beach, dog walking, watersports, and wildlife and birdwatching from the beach and the dunes behind the beach.

Although board sport enthusiasts can paddle across the river to access the beach, there are safety risks without direct bridge access as outlined below.

A wider footbridge (3.5metres is planned) would increase the accessibility of the beach to those in wheelchairs and could enable easier transfer of water sports equipment.

4.6.2 Safety risks

Health and safety concerns were raised by survey respondents regarding both the east and west beaches. Without a bridge to the east beach, there is no safe and reliable access for the many watersports enthusiasts, local families and holidaymakers keen to use the beach and water.

Our consultation captured personal accounts of local residents assisting families and young people who have become stranded on the beach after crossing the river between tides.

The Moray Coastal Trail, a popular walking route, relies on a bridge crossing over the river Lossie, and as a result, walkers have also become stranded when walking this route. The alternative route involves an additional 2 mile diversion along a public road with no pavement

(<https://www.morayways.org.uk/routes/the-moray-coast-trail/>).

Without a bridge, there is no land based emergency access to the beach, and one respondent commented that ***“there will be a casualty at some point”*** – a concern that was reflected by others.

Lack of access to the east beach displaces many to Lossiemouth’s west beach which runs parallel to Moray golf course. This has resulted in an increase of visitors crossing the golf course to access the beach, which puts them at risk, particularly during high tide when they are pushed onto dunes and course pathways.

5 Potential Projects Complementary to Replacing the Bridge

The following summarises by category the project/action ideas given by survey respondents and through our telephone interviews. These have been broadly grouped into 9 categories of projects/ideas, and were reviewed at a high level by the project steering group – although more detailed review and wider consultation with community groups will be required.

Ref	Project	Funding Cost (High, Medium or Low)			Impact (High, Medium or Low)			Support Expressed	
		H	M	L	H	M	L	LBA	LCDT
1	Signage and information	✓			✓			✓	✓
2	Development of surrounding area and heritage trails	✓			✓				✓
3	Additional 'seaside' attractions and equipment	✓			✓				✓
4	Accessible changing facilities	✓				✓			
5	Traffic management and parking	✓			✓				
6	Marketing and promotion		✓		✓			✓	✓
7	Events		✓			✓			
8	Support for businesses		✓			✓			
9	Take-away food & drink			✓			✓		

1. Signage and information

- 1.1. Improved signage to Lossiemouth on A96 at Forres and Llanbryde highlighting available facilities
- 1.2. Improved signage in Lossiemouth to all attractions and recreational areas *[although this has already been commissioned by the LBA throughout the town as well as paper maps distributed that are available in accommodation properties, cafés/restaurants, etc]*
- 1.3. Tourist information kiosk situated close to the bridge access to provide details of local attractions, accommodation etc

2. Development of the surrounding area and heritage trails

- 2.1. Regeneration of spaces and establishment of new visitor attractions, such as boardwalks/heritage trails/revitalised Station Park
- 2.2. Walking trails through Lossiemouth, including the fishing heritage and surrounding woods
- 2.3. QPR codes scan in any language
- 2.4. Seating areas and benches along the seafront
- 2.5. Viewing points with fixed binoculars for spotting sealife and boats
- 2.6. New jets - area for viewing
- 2.7. Colour changing lights on the new bridge

3. Additional 'seaside' attractions and equipment

- 3.1. More tourist services on the beach – the wider bridge would make transfer of items over the bridge easier
- 3.2. Hiring of beach wheelchairs, fishing gear, scuba diving gear, floats, surfwear/boards, etc
- 3.3. Increase over 50s visits to Lossiemouth (high spend) with senior play park, indoor - wet weather facility for adults/children, toilets; with publications (online/paper) showing walks/wildlife, history
- 3.4. Reinstate the pitch and putt
- 3.5. Beach games
- 3.6. More tourist attractions where station was
- 3.7. Outdoor cinema
- 3.8. Arcade centre
- 3.9. Businesses on seafront selling tourist souvenir items

4. Accessible changing facilities

A safe and user-friendly changing area with toilets would support Friendly Access and SurfABLE Scotland in offering fully adaptive surf therapy through providing watersports and adventure activities to children and adults with disabilities and conditions (physical, hidden, learning, sensory and medical). A similar facility and location in Wales (developed by Surfability UK) has made it possible for growth from 200 participating athletes a year now on track to 500; hosting events with up to 15 wheelchair users in a single day. The facility in Wales has accessible changing rooms, kit drying facilities and kit storage space.

5. Traffic management and parking

- 5.1. Better and more visible parking in the town, especially at the river area
- 5.2. Increase non chargeable parking spaces
- 5.3. Pedestrian friendly seafront with some disabled access spaces. Introduce pedestrian crossing near the memorial
- 5.4. Improve parking facilities at West Beach car park
- 5.5. From Miele's to toilet block could be car parking. If people don't get parked on the promenade they will not go on to the car park; they want to park on the prom with their ice cream

6. Marketing and promotion

- 6.1. YouTube videos and marketing through social media
- 6.2. Make it clear that Lossiemouth is still open for business
- 6.3. Draw everything together and focus on what we have – the hidden gems, the lighthouse and caves, to Windswept etc; and market all of what Lossiemouth has to offer
- 6.4. Walking competitions for kids – What is in your town?
- 6.5. Promoting Lossiemouth as a destination when walking along the coastal trail that includes the bridge would help increase visitor numbers – and encourage them to spend money at overnight accommodation, souvenir shops, and food providers.
- 6.6. Capitalise on visitors to the distillery areas, Baxters, Walkers and Johnstons Mill.
- 6.7. A discount booklet could be produced with local businesses represented for free if they offered a discount on their product. The booklet could be sold for a very small amount,

which would allow all locals and visitors discounted access to many of the attractions of Lossiemouth. This would attract more use of the town's businesses and increase spending overall whilst generating funds from the sale of the discount booklet

- 6.8. This could be an amazing opportunity for local business to advertise on the bridge. Although this would have to be done extremely tastefully and not take away from the beauty of the bridge itself.

7. Events

- 7.1. One-day events similar to Raft Race, Seafest, Christmas Lights switch-on
- 7.2. A seafood festival celebrating the fishing heritage, including cooking demos from local chefs, food stalls, photo ops with seafood character (e.g. Laurie the Lobster), food competitions, "big beach BBQ" encompassing use of the bridge
- 7.3. Farmers market once a month with a charge for stall holders
- 7.4. Jazz festival

8. Support for businesses

- 8.1. Incentives and investment for pop up shops in empty shop spaces *[although empty shops are not currently a problem in the town]*
- 8.2. Fishing museum is run by volunteers with variable opening hours. If this was always open on set days, advertised and manned by someone on a full time basis, this would benefit tourist trade

9. Take-away food & drink options

- 9.1. More cafes and restaurants with take-out options
- 9.2. Open air cafe/shops in old bandstand (by old train terminus)
- 9.3. Sell refreshments on the beach, with app-based order and delivery

Potential Funding Sources

Across the above categories of project or activity, there are potentially a very large number of funding sources – sub-regional, regional, and national – and these could increase (or change their focus) through supporting the recovery from negative Covid-related impacts.

Funding Scotland lists funders with a track record of supporting projects in Scotland (from small grants to funding for large capital projects, and is run by the Scottish Council for Voluntary Organisations (SCVO). This is a free online search engine.

Many funding sources favour (or are restricted to) applications from charities.

Once projects have been specified and costed, it is best to apply to as many relevant sources as possible to maximise overall funding.

Potential significant funding sources might include:

- The National Lottery, including Awards for All
- EB Scotland, which distributes money raised through a tax credit scheme (The Scottish Communities Landfill Fund) from money contributed by landfill operators
- Highlands and Islands Enterprise, which can fund a range of project types subject to a robust investment appraisal and budget availability
- Moray Council – in particular for traffic management and parking expenditures
- Rural Scotland Infrastructure Fund (VisitScotland), with applications via Local Authorities
- Visit Moray Speyside
- Scottish Marine Environmental Enhancement Fund – a new fund to be launched later in 2021
- Crown Estates Scotland Community Capacity Grants Programme and the Crown Estate Fund Grant Aid Scheme operated through Local Authorities
- Funds that will be set up by the UK and/or Scottish Government to replace previous EU funding programmes

6 Respondents Comments

Comments on the impact of the bridge closure included:

Bridge closure and now Covid has already meant that half of our business, the convenience side, has closed. Turnover has been dramatically reduced.

All summer I was speaking to people who came to Lossie to go to the beach and then moved on when they realised that wasn't an option. Although busy I had many customers from previous years who did not return due to the bridge being closed.

Without the east beach we have lost the main reason that a family would choose Lossiemouth for their holiday. The shops on the front complement the beach experience, the accommodation provided in the town allows tourists to stay, but without the beach there is no reason for them to require the other services, and so the town declines. This bridge is key to the success of the town, and with holidays in the UK being very much on the agenda for the next few years, we must act quickly to gain our share of this market. If we don't, we will lose our services and businesses, and a bridge won't be enough to bring these back, so we must act now.

My husband and I have a puppy that we'd love to take to East Beach and get some ice cream from Miele's on the way, but since the bridge is down we've been going to West Beach and not spending any money instead. My husband's parents are less interested in visiting since the East Beach is their favourite Lossie feature and I'm sure there are many other tourists with similar feelings.

Whilst we have another beach, it is not accessible much of the week due to tides. Parking is also a big problem there. The economy of our community is hugely dependent on tourism and tourists love that beach as do locals from all over Moray. They come to the beach from Elgin and buy an ice cream or go for lunch.

Comments relating to a new bridge and retaining the existing bridge as an icon

We believe a high quality bridge in the same position as the existing bridge is the only suitable option that will genuinely benefit the town and wider Moray. A smaller/shorter version as has been mentioned in front of our business may well benefit our business directly but we feel it would be to the detriment of the picturesque town and to some other businesses.

A bridge built simply as a crossing to access the beach is fine but will not protect the local economy; it must be built as a visitor attraction also. Any argument for initial saving on a shorter/position for the bridge in our view could eventually see the spend escalate by way of infrastructure costs and would be short minded also. As it stands we have a beautiful promenade which should remain as the name suggests a walk way and a free space. The promenade, bridge and the higher road of Prospect Terrace running at a parallel are where the beauty of the existing bridge can be appreciated and we believe it is important we try to replicate if not improve this view and promenade. A shorter bridge in a different location would limit the photography of the bridge that many people come for. We should be careful of congestion should the position of the bridge be moved. Where it stands now allows the town to offer space to the locals and visitors alike.

A more architectural, funky bridge will bring people.

These days people can search where to visit and it is the picturesque nature of our bridge that will pull extra visitors in their numbers to Lossiemouth for what can be a very short season.

Moray deserves something spectacular, iconic, not just about accessibility but it could be a huge pull factor for Moray. It would be a disgrace to build anything less than what is there at the moment. The bridge, we feel must look as beautiful an attraction as it stands now

Appendix A: Online survey questions

Q1 Please provide your business name

[Click here to enter text.](#)

Q2 Please select from the drop down menu below the category that best fits your business:

Other - please specify

If retail please specify category (food, clothing etc)

[Click here to enter text.](#)

If other, please specify

[Click here to enter text.](#)

Q3 Approximately how far is your business located from the bridge that is to be replaced

Less than 5 minutes walk

5-10 minutes walk

11-15 minutes walk

16-20 minutes walk

More than 20 minutes

(Note that the Options Appraisal is considering alternative locations and that value for public money will be a key consideration – although a recent Business Association survey has found a majority preference for keeping the current location)

Q4 Has the absence of a bridge affected your business trade since it closed on 24 July 2019?

Significantly negatively

To an extent negatively

No impact

Positive impact (benefit from visitors focusing on other areas in Lossiemouth without the bridge access)

Q5 Compared with calendar year 2018, how much lower do you think your turnover would be in 2022 without a bridge compared with having a replacement bridge

No measurable difference

1-5% reduction

6-10% reduction

11-20% reduction

21-30% reduction

31-40% reduction

41-50% reduction

More than 50% reduction

Q5(a) How much (approx) might this annual turnover reduction be (*optional*)

- Q6** Without other changes in Lossiemouth (e.g. continuing Covid-related constraints, increased local population, high demand from other markets), might your business, without a replacement bridge:
- (i) Need to close – high risk / medium risk / low risk, but possible
 - (ii) Reduce its opening season or hours, or reduce staffing
- Q7** Were you planning before the bridge closure to expand your business?
- Yes – plans were developed
 Had been considering
 No
- Q8** Might a high quality replacement bridge influence your future investment or expansion aspirations?
- Yes, fairly definitely
 Probably
 Possibly
 Unlikely
- Q8(a)** *(Optional)* Please provide summary details of what your plans might be, and *(optional)* how much increased annual turnover might result
- Q9** Please summarise any ideas you might have on how Lossiemouth might increase visitor spend in the future with a replacement bridge – which could require public sector spending or support. This might involve attracting more visitors and/or increasing average visitor spend.
- Q10** Any other comments, or clarifications on the information you have provided above

Appendix B: List of online survey respondents

Serviced accommodation - With catering for residents only Links Lodge Guest House, Stotfield Road Lossiemouth House B&B Royce Clark / Stotfield Ltd / Grampian Furnishers Ltd
Serviced accommodation - With catering for non-residents Firth Hotel Stotfield Hotel
Un-serviced accommodation Pitgaveny Court holiday let Wickie holiday lets
Caravan/motorhome/camping site Lossiemouth Bay Caravan Park Beachview house holiday lets
Restaurant/café/pub Bridge 45, Salt Cellar, Guidis, Smugglers Harbour Lights The Seafood Restaurant and Grill
Takeaway food The Galley Chip shop
Retail - Highly geared to visitor trade Miele's of Lossie Retail - Visitor trade of some importance McClintock optical styling boutique Morgans Of Lossiemouth Ltd Moray Trophies Ltd The Re:Store Unique Retail - For visitors and local residents, but visitor trade important Ashers Bakery D&I Tropicals Fabulous Hairdressing/ GHQ barbers James Rizza and Sons my Younger day Spa
Supplier to local businesses that serve visitors Dmdotpr Signworks Pascobi Design Windswept Brewing Co. Digital Routes Ltd
Recreational - With retail and/or catering sales to visitors New Wave Surf School – surf apparel retail Outfit Moray Moray Golf Club
Recreational - Without such sales to visitors Action Marine Park No Name Buckley's Newsagent Ltd On the Up Physio, Pilates and CBT

Other

Lossie taxis

Campbell & McConnachie Ltd

BeeDeck Balloons

Shoreline Motors and Properties Ltd

Covesea Lighthouse Community Company Limited (non-profit charity)

Vix the Barbers

Stuart Mason / Action COACH

Appendix C: List of telephone interview participants

Business Type	Business Name	Description	Walking time	
			To existing bridge	To esplanade
Serviced accommodation - With catering for residents only	Lossiemouth House B&B	6 bedroom Bed & Breakfast	4 mins	1 min
Serviced accommodation - With catering for non-residents	Firth Hotel	9 bedroom hotel with restaurant	6 mins	2 min
	Stotfield Hotel	47 bedroom hotel with restaurant seating 70	15 mins	14 mins
Un-serviced accommodation	Covesea Lighthouse Cottages	2 and 3 bedroom self- catering cottages	50 mins	50 mins
	Seatown Cottage	2 bedroom cottage	1 min	5 min
Caravan/motorhome/ camping site	Lossiemouth Bay Caravan Park	Static caravan park with 155 pitches (4 units available to let)	5 mins	10 mins
	Silver Sands Holiday Park	1 of 9 Bridge Leisure Parks in UK. Next to West Beach, offers static caravans, touring & camping with indoor pool, fitness, restaurant, bar and live entertainment.	50 mins	50 mins
Restaurant/café/pub	Bridge 45, Salt Cellar, Guidis, Smugglers	Family run business of 4 venues: Steak & seafood restaurant seats 85, restaurant/ cafe seats 70, pizzeria & ice cream parlour seats 35, whisky & gin bar seats 35. Outdoor seating for 65	4 mins	0 min
	Harbour Lights	Bistro & Café situated at the marina seating 62 with additional outdoor tables	11 mins	7 mins
	The Seafood Restaurant and Grill	BYOB restaurant and takeaway with seating for 20	6 min	5 mins
Retail - Highly geared to visitor trade	Miele's of Lossie	Long established family run ice cream and convenience store	5 min	1 min
Retail - Visitor trade of some importance	Unique	Ladies clothing and accessories	7 min	3 min
Retail - For visitors and local residents, but visitor trade important	Ashers Bakery	Nairn based bakery shop	4 min	1 min
	James Rizza and Sons	Established in 1930's family ice cream and confectioners	5 mins	0 min
Supplier to local businesses that serve visitors	Windswept Brewing Co.	Brewery with tours, visitor centre, café/ bar and shop. Located in industrial estate close to RAF Lossiemouth	22 mins	21 mins
Recreational - With retail and/or catering sales to visitors	New Wave Surf School	Surf school offering lessons and hire of surf and Stand up Paddle boards. Surf hut with changing rooms and board store	2 mins	4 mins
Other	Moray Golf Club	Comprises an old links and new course with pro shop and outsourced restaurant seating 40	16 mins	15 mins

Appendix D: Telephone interview questions

1. Introduction

- 1.1. Please can you provide me with a background to your business?
- 1.2. Please describe how the closure of the east beach bridge has impacted your business
- 1.3. How important is the east beach to customers/ your business?

2. Customer Information

- 2.1. In 2018 / typical year what was your approximate split of customer type (Holidaymaker/ Business traveller/ Day tripper/ Local/ Other)?

3. Employees

- 3.1. Number of FTEs
- 3.2. How does this vary over the year?

4. Do you have any further ideas you would like to share regarding how Lossiemouth might increase visitor spend in the future with a replacement bridge – which could require public sector spending or support. This might involve attracting more visitors and/or increasing average visitor spend.

5. Do you have anything else you would like to add?

6. Industry specific questions:

Accommodation

- Capacity and Occupancy in 2018/ typical year
- Number of rooms
- Maximum bed space capacity
- Did bridge closure affect occupancy levels in 2018? If so, to what extent? How do you think occupancy in 2022 would be with/without bridge?
- How does occupancy typically vary by season?
- Do holidaymakers use Lossiemouth as a base to explore or stay in the town?

Catering

- Restaurant capacity and covers
- Max covers/seating capacity
- Average weekly covers
- Number of sittings if applicable
- Variation by season

Appendix E: Lossiemouth accommodation detailed overview
[separately available]