

THE SOUTHERN UPLAND WAY AN UNDERUSED RESOURCE FOR SOUTHERN SCOTLAND?

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Executive Summary, Recommendations & Conclusions.

The full report is available on disk from The Southern Upland Partnership.

EXECUTIVE SUMMARY

In April 2004, the Crichton Tourism Research Centre (University of Glasgow) was commissioned by the Southern Uplands Partnership (SUP) to investigate and report on the current usage and future potential of the Southern Upland Way (SUW). Stretching 341km from Portpatrick on the west coast of Dumfries & Galloway to Cockburnspath on the east coast of the Scottish Borders, this designated long distance route (LDR) offers a significant challenge to those aiming to traverse its length. Comparisons with other Long Distance Routes (LDRs), such as the West Highland Way, demonstrate that such routes can contribute significantly to local economies. This study therefore seeks to establish the potential for the SUW to enhance the economic status of the south of Scotland through increased numbers of **Long Distance Walkers (LDWs)**.

The methodological process adopted involved a reinforcing quantitative and qualitative approach to allow for both breadth and depth of analysis. The methods used in the generation of the data included: face-to-face intercept surveys of SUW users; self-administered questionnaires completed by SUW LDWs and service providers; local business focus-groups; semi-structured face-to-face interviews; telephone interviews; automated counters on route; and analysis of bothy books. The study is supported by reference to a wide range of literature. In addition, two surveys using self-administered questionnaires were conducted on the West Highland Way (WHW) and Wainwright's Coast to Coast (CC) for comparative purposes.

The following summary outlines the key findings of the research. Further details, supporting the findings, are detailed in the main body of the report and in the Appendices. A list of recommendations is presented in Chapter 5 of the main report.

Data was generated from a total of 67 long distance walking groups representing 141 individuals along the route of the SUW. Based on the assumption that 1000 long distance walkers use the route each year, the data has a margin of error of $\pm 7.65\%$ at the 95% confidence level. Data was also generated from 170 groups of **other SUW users**, representing 394 individuals. Based on the assumption that 36144 people used the SUW each year for reasons other than long distance walking (see Section 2.2.5), an estimate of 380 individuals was required as a representative sample with a margin or error of $\pm 5\%$ at the 95% confidence level. This figure was achieved.

The total number of LDWs using the SUW each year is estimated at 1034, of which 46.3% (479) were walking the route in a single continuous effort (**whole way walkers**). Those walking the whole of the SUW in stages over a period of time (**sectional whole way walkers**) constituted 19.4% (200) and long distance walkers using the route in sections, but with no intension of completing the route over time (**several days walkers**), represented 34.3% (355). The proportion of walkers completing the SUW in one continuous effort was considerably lower than corresponding walkers on the WHW and CC. The majority of SUW LDWs were male (56.0%), walking in pairs (47.8%), aged between 45 and 64 (54.6%) and walking in a west to east direction (88.1%). The age range distribution reveals a similarity with the CC route and a contrast with the WHW, with the latter attracting a younger clientele.

Over two thirds of LDWs (68.6%) are UK residents with most coming from England. Other LDWs came from parts of western Europe, in particular the Netherlands (11.9%) and Belgium (6.0%).

Whole way walkers took an average of 14.6 days to complete the SUW and spent an average of £40.74 per person per day, resulting in an average trip cost of £594.80 (excluding travel to and from the route). The average daily spend was similar for whole way walkers on the WHW and CC. Sectional whole way walkers spent an average duration of 6.6 days on the SUW, spending £37.66 per person per day with an average trip cost of £248.56 (excluding travel to and from the route). Several days walkers spent an average of 5.5 days on-route, spending an average £45.31 per person per day. Combining all LDWs the mean value of SUW as a long distance route was estimated to be in the region of £423 087.20.

Economic data revealed through the user diaries indicate considerable variation on average daily spend, attributable to accommodation variations. The lowest spending individuals spent the majority of their overnight stays under canvas and making use of the bothies along the Way, whilst those spending more used serviced accommodation. Hotels/ guesthouses were the most popular type of accommodation used (76.1%) by LDW groups followed by B&B/ farm accommodation (70.1%) and hut/ bothy (23.8%). One fifth of all LDW groups made use of a tent while walking the SUW. Around a third of LDW groups made use of the luggage transfer service. Data from the user diaries

reveal that the following visitor attractions benefit from SUW users: Castle Kennedy Gardens; Drumlanrig Castle; Lead Mining Museum; Traquair House and Melrose Abbey. The Waymerks project (see Section 3.1.5) was well received by 71.6% of LDWs who thought these added to the attraction of the SUW.

The number of other SUW users, excluding LDWs, was estimated at 52609, however this figure only relates to locations where the automated counters were located. The majority of other SUW users were on a short walk (67.6%) with the second largest proportion using the route as part of a day walk (29.4%). The majority of other SUW users were from the UK (97.1%) with 40.0% living within 30 miles of the route. Scottish residents represented the largest proportion (71.8%) followed by English visitors (25.3%) and 2 groups from the USA and 1 from Australia. The data revealed a high awareness amongst other SUW users of the path's status as the SUW (93.5%). The SUW can be considered an important local resource.

The internet (55.2%) and guidebooks (29.9%) were importance sources of information for LDWs when planning their trip, but less so for other SUW users who have previous knowledge of the route or are local (55.3%). Maps (17.1%) and Tourist Information Centres (14.1%) are more important sources of information for other SUW users.

From the 171 service providers who returned a questionnaire (response rate = 18.0%) the SUW is not considered an important economic vehicle for service providers along the route. For some on the route (particularly accommodation providers), the SUW is very important, however economic importance declines rapidly with distance from the route. The mean annual income attributable to the route, from those who benefit (55.8%), was £784.63 during 2002 – 2003.

The scenery/landscape and weather were considered by both the LDWs and other SUW users to be particularly satisfying elements of their journey. Peacefulness/ solitude, wildlife/nature and good signage/waymarking were also amongst the most

frequently cited elements of journey satisfaction. More specific to the LDWs is the challenge aspect of the SUW and good accommodation.

In terms of elements of journey dissatisfaction, there is some similarity between LDWs

and other SUW users with regards to the weather, condition of the path and signage/ waymarking in some locations. Specific to the LDWs is too much walking on tarmac (16.4%), walking through forestry plantation (6.0%), guidebook out of date (3.0%) and Cockburnspath (3.0%). Cockburnspath, and the lack of an end experience, was singled out by a number of LDWs who submitted diaries. Despite these elements of journey dissatisfaction, 98.2% of other SUW users and 90.0% of LDWs were either very satisfied or fairly satisfied with the overall experience of their journey.

Recommendations for improving the SUW, made by the LDWs and other SUW users, reflect many of the elements of journey dissatisfaction. By in large, recommendations relate to a general improvement of signage/ waymarking and improving the path condition in certain locations. More rubbish bins (2.9%), more seats (1.8%) and litter removal (2.4%) were specific recommendations suggested by other SUW users, whereas specific recommendations made by LDWs include more manageable section lengths (10.4%), re-route path away from tarmac (7.5%), update guidebook (6.0%) and more bothies/ shelters (4.5%). Both LDWs and other SUW users recommended more publicity/ promotion of the SUW.

Awareness of the SUW was shown to be relatively low amongst users of other LDRs. The SUW has all the attributes required for a successful Long Distance Route: challenge, scenery, good accommodation, good waymarking and a friendly supporting community. Whilst there are a few structural changes required to the route, its main disadvantage is the lack of people using it. Users of LDRs, even those attempting the routes on a budget, can generate significant income for rural locations. The SUW, marketed and promoted appropriately, could be an important contributor to the economy of the south of Scotland.

A full list of recommendations based on the analysis of all sources of information used in the production of this report is given in Chapter 5.

Citing guidance –

Crichton Tourism Research Centre 2005

The Southern Upland Way: An underused resource for southern Scotland? University of Glasgow, Dumfries. Report commissioned by the Southern Upland Partnership.

RECOMMENDATIONS

The SUW has all the attributes required for a successful LDR: *challenge, scenery, good accommodation, good waymarking* and a *friendly supporting community*. Whilst there are a few structural changes required to the route, its main disadvantage is the lack of people using it. Users of LDRs, even those attempting the routes on a budget, can generate significant income for rural locations. The SUW, marketed and promoted appropriately, could be an important contributor to the economy of the south of Scotland.

ROUTE MANAGEMENT AND MARKETING

Route management and development

A key recommendation is that a co-ordinating agency be created to combine promotion, marketing and management of the route. This could be in the form of a *route manager* with overall responsibility for managing, marketing and promotion of the route. A single autonomous agency will help to alleviate any cross-regional differences and will act as a point of contact for all service providers and Local Authorities. Whilst it is appreciated that the SUW rangers do an extremely good job in maintaining the route, the lack of a single route information point is a problem for all users and service providers. The role of this agency (person) would be to ensure that information pertaining to the route (e.g. accommodation, diversions) is up to date and to increase the presence of the route locally, nationally (through walking events) and internationally (via the web).

Marketing attributes

Promote the experience.

Market the *challenge* - The challenge aspect of the SUW is one of its greatest strengths.

Market the *remoteness* - Those who walk the route also enjoy the remoteness (lack of other walkers) compared with other routes.

Market Scotland's *undiscovered* LDR - The low profile of the SUW, in relation to more popular routes such as the WHW and Pennine Way, can be considered a positive aspect to some walkers who enjoy the feeling of discovery.

Market the *friendliness* – The support of service providers is key to the success of the route.

Market the *variety* – The SUW landscape changes dramatically from west to east. The SUW is not just about moor and forest and this myth should be dispelled.

Promotion of the route

Promotion should be centred on key locations, including the Netherlands, Belgium, Northern Ireland and Eire. An increased web presence will help to increase the awareness of the route nationally.

The route also needs to be promoted in major walking publications (Trail, TGO, etc). This however, must be done at the right time. Promotion of the route needs to be carried out before the end of the year so that users can plan their journey for the following year. There needs to be a presence at walking festivals and different events to raise awareness of the route. This should be co-ordinated where several bodies are working to promote the route.

In common with all tourism products the promotion must be sustained. With this in mind, the development of an annual event, for example, Great Caledonian Challenge on the WHW, will raise the profile of the route on a year by year basis. Whilst the promotion of the route should start with a significant event (e.g. the birthday celebration), this cannot be the only *event* planned. The use of well known personalities will be important here. The impact of the television programme by Jimmy McGregor had a significant but very short term impact (MA – pers. comm) suggesting that the public require continual reminders of the route, rather than *one-off* events.

Improve and develop sources of information

All current SUW information points should be regularly updated with information. Information about diversions and the condition of the paths will aid LDWs in their preparation. Information about local services (accommodation, where to get food, telephone, etc.) would also benefit users.

Information should also be included in the recommended shelters. This information could suggest the types of wildlife walkers may encounter on that particular section. The official website should be enhanced and made more user friendly.

Develop new guidebook

It is fundamental that a new guidebook, and accompanying single route map, is developed.

ROUTE INFRASTRUCTURE

More shelters along the route

Shelters should be placed in some areas, particularly on the long stretches (New Luce – Bargrennan; Bargrennan – Dalry; Dalry – Sanquhar) at exposed locations. These would allow temporary protection from the elements whilst acting as natural stopovers for lunch. The shelters should be sympathetic to the environmental surroundings and must be robust enough to withstand extreme weather conditions. Access to the shelters for maintenance is a key consideration. Shelters could also be stationed at *pick-up* points where walkers can shelter from elements while waiting for their transport.

Improve waymarking

Waymarking, especially following New Luce, should be improved to provide a clear indication of direction. The use of the white thistle emblem is important for distinguishing between normal fence posts and the official route from a distance. Waymarkers that don't use this recognised *branding* should be replaced.

Improve boggy/ muddy path conditions

Most LDWs can sustain patches of boggy/ muddy path conditions, however prolonged exposure to these environmental conditions will eventually erode enjoyment and perhaps motivation. Elevated duckboards should be installed where the problem is persistent, however where the problem persists over a considerable distance, drainage improvements may be necessary.

Develop service provider network

The development of the route should also consider the needs of the service providers. It was suggested by some accommodation providers that a web based chat room be established, so that service providers along the route could contact each other. This was also considered important so that missing walkers could be identified.

Litter

Litter at the start of the route (Portpatrick) is a problem which should be addressed, not only for LDWs but for local users as well.

ROUTE EXPERIENCE

Improve the end experience

The SUW's claim of being a coast to coast route is diluted by the fact that the official termination point (Cockburnspath) is inland. For ritualistic reasons, dipping one's boot in the Irish Channel and then the North Sea officiates authenticity as a true coast to coast. It is recommended that an alternative *coastal* location be promoted as the final destination (Cove Harbour, for example). It is important, locally, that Cockburnspath remains on-route and acts as the last overnight location following completion of the route.

For many LDWs, the present termination point (West – East) is a disappointment in terms of *no end experience*. Facilities in Cockburnspath should be improved to accommodate the needs of LDWs. In addition, there needs to be clear signage where the route ends.

Develop official passport

A passport system whereby users can have an official stamp at set locations along the route would provide an authentic verification of achievement. This could be termed *The SUW LDR Club* and could draw on the exclusive nature of the Club to attract new Members.

Maintain and promote Waymerks project

The Waymerks project is generally accepted by LDWs and other SUW users as adding value to the route and should be maintained. More resources should be directed at promoting the unique nature of Waymerks in order to encourage more use of the SUW. The Waymerks should be further promoted in Tourist Information Centres.

* See the following website promoting membership of the Lyke Wake Club, which is open to anyone who completes the walk in under 24 hours (<http://www.lykewake.org/>). Although club membership is based on completing the route within a given time-scale, the SUW need not be so restrictive since 212 miles on foot represents a significant challenge despite the time element.

ENHANCING ECONOMIC INTEGRATION

Linking communities

It is recommended that Moffat is linked via an *optional* circular route adjoining the SUW. This will afford LDWs the opportunity to gather supplies before the trek to St. Mary's Loch. Linking Moffat will also benefit service providers. A longer term option to expand the economic impact of the route would be to reroute some section to include smaller communities.

Develop circular routes - SUW *bite size*

The development of circular paths, incorporating the SUW, would encompass local attractions/settlements. Routes should reflect the essence of the SUW (challenge, scenery, etc) but in smaller chunks and incorporating attractions and providing interpretation (the Covenanters, etc.), making the route more interesting.

Multi-functional sections

One way of adding value to the SUW is to enhance the functionality. Mountain biking, and cycling in general, has become increasingly popular in the last 5 years. Although not appropriate in environmentally sensitive areas, mountain biking parts of the SUW would offer a new challenge and widen the potential marketplace.

CONCLUSIONS

The SUW is, at present, underutilised as a LDR and as such does not impact significantly on the economy of southern Scotland. It does however have around 1000 people using it as a long distance route, contributing close to £0.5m annually. This research demonstrates that the SUW has all the requisite attributes required of a successful LDR but it requires investment to ensure that these attributes are marketed appropriately, in a sustained and concerted manner. This research also demonstrates that the route has value as a recreational asset for both local residents and day visitors to the region.

It is recommended that minor changes are required to improve the infrastructure of the route. More significantly, the route requires coordinated management and marketing and to this end, it is recommended that the SUW stakeholders invest in a route manager.

*The full report is available on disk from The Southern Upland Partnership.
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