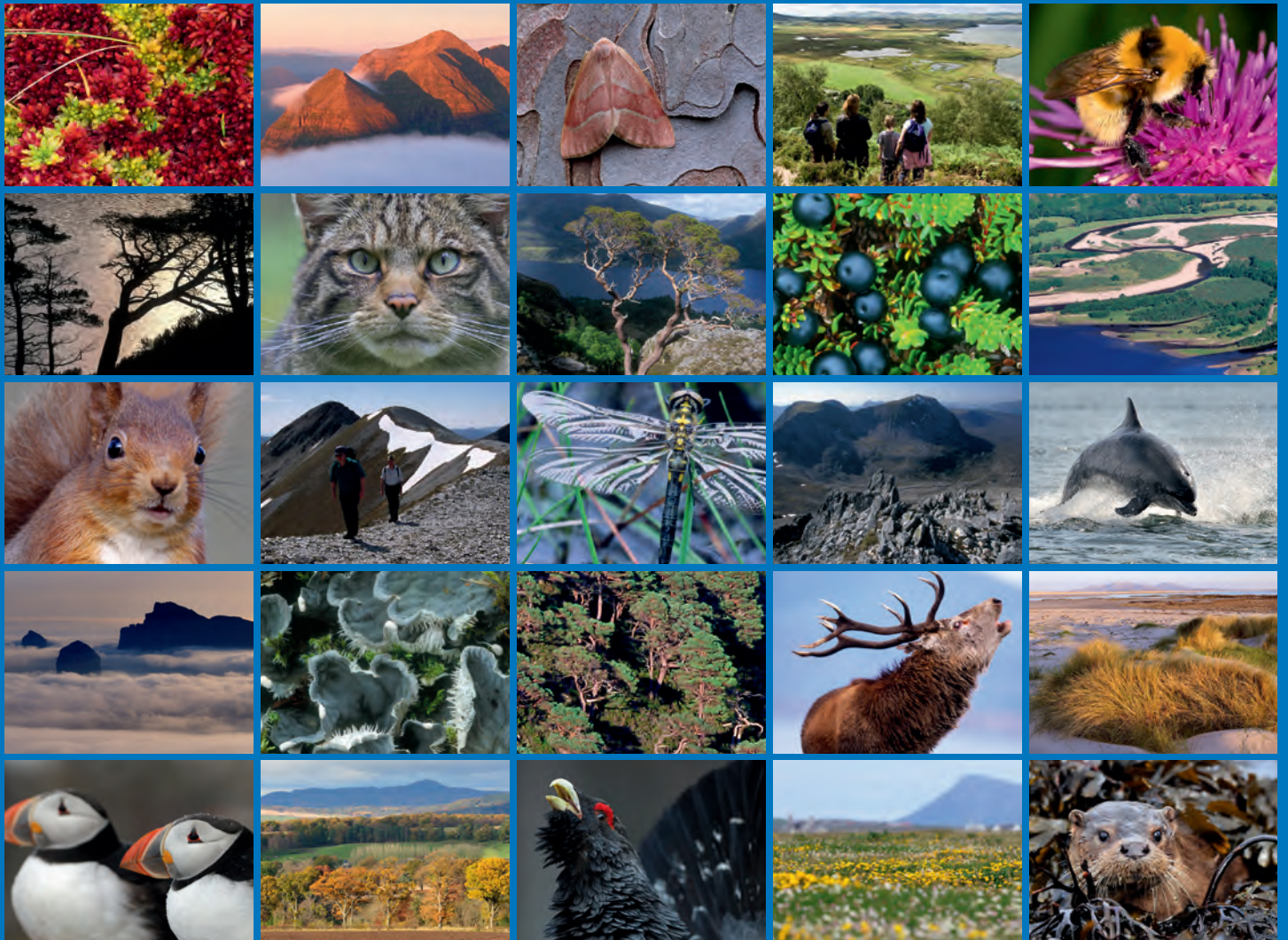


Mull long distance route: A socio-economic study





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COMMISSIONED REPORT

Commissioned Report No. 743

Mull long distance route: A socio-economic study

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COMMISSIONED REPORT

Summary

Mull long distance route: A socio-economic study

Commissioned Report No: 743

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Contractor: Vyv Wood-Gee, Countryside Management Consultant

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Long distance route; pilgrimage; socio-economic; Mull; Iona.

Background

The idea of developing a long distance route (LDR) across the Ross of Mull has been discussed for many years, and was identified as a priority in the 2011 Mull and Iona Community Plan. The main drivers behind the proposal are economic development through tourism and improving access opportunities for local people. Mull and Iona Community Trust (MICT) set up a steering group to explore the project's feasibility. As part of their advisory role to the steering group, Scottish Natural Heritage (SNH) commissioned this socio-economic study to identify in more detail the potential social, health and economic benefits that route development might bring for route users and local communities.

Main findings

- The Mull and Iona 2012 Visitor Survey identified demand for more readily identifiable hiking and walking opportunities, better signed paths and safe cross country cycling routes. Community consultations undertaken by MICT have also identified demand for development of a safe off-road cycling route and readily accessible clearly waymarked paths suitable for all ages and abilities.
- The proposed LDR would create a new visitor attraction unique to Mull with scope to attract new visitors to both Mull generally and the Ross of Mull in particular, and to encourage existing visitors to stay longer and spend more.
- Experience of other pilgrimage routes at home and abroad suggests that there is significant scope to promote the route both as a standalone route and as part of a longer pilgrimage route to St. Andrews. It would undoubtedly attract significant media attention and raise the profile of the route from the outset.
- The combination of features including the cradle of Christianity, coast, spectacular and very varied scenery, and visit to a Scottish island would potentially put the proposed route high up the LDR rankings in terms of interest and level of use.
- For cyclists, the route connects directly to the Oban to Fort William section of the National Cycle Network, and would link via ferry to the Tyndrum to Oban path in course of development which in turn links to the West Highland Way.
- There is scope for development and promotion of the proposed LDR for multi-activity trips and experiences, including walking, cycling and sea-kayaking.
- The proposed LDR would attract high levels of interest for challenges and events including marathons, triathlons, trail and sail/paddle.

- Establishment and promotion of a suitable well-designed, waymarked route would contribute towards delivery of the Scottish Government’s targets to increase physical activity rates with associated mental and physical health benefits.
- Development and promotion of suitably spaced accommodation and support services matched to the needs of the target audiences would be critical to the success of the route(s).
- In addition to accommodation, a new LDR across Mull offers scope for development of a wide range of other enterprises and support services including food outlets, walking and cycling supplies, baggage transfer, packaged tours, cycle transport, route specific merchandise and potentially new ferry links.
- Realistically the majority of route usage is likely to be within the main tourist season from Easter to October.
- Drawing on other studies and experience of relevant routes elsewhere in the UK, ‘best guesstimate’ figures for anticipated route usage after three years are 10,000 short or part-way walkers, 2,500 full-length route walkers, and 1,000 cyclists. These figures assume that appropriate accommodation and services are available on route, that route alignment and quality of infrastructure reflect user needs and expectations and that the route is appropriately marketed. Pro-active marketing of an appropriately designed route, or bespoke separate walking and cycling routes, could attract significantly higher levels of walking and cycling use.
- In theory the proposed route could be of high appeal to horse riders but due to the time and cost of transporting their own horses to Mull, level of use of the proposed route by visiting horse riders is likely to be relatively low.
- Based on average spend of £50/day for full length walkers, £53/day for full length cyclists and £15/day for part-length users, the suggested number of route users would generate additional income of approximately £906,000 per annum or £1,160,043 after taking account of multiplier effect. Of this, approximately 50% would be expected to stay local to Mull.
- The communities which will benefit most are those directly on route, i.e. Craignure, Loch Don, Pennyghael, Bunessan, Fionnphort and Iona.
- The very high proportion of the route currently proposed which is on or alongside road is likely to seriously undermine the potential appeal.
- In order to maximise the benefits it is recommended that development focus on a braided largely off-road route.
- Identification and development of suitable off-road path options between Craignure and Strathcoil, and between Pennyghael and Bunessan and Fionnphort, will be essential to the success of the route for all types of user.
- Recommendations for future route development include surveys to establish baseline data, careful consideration as to the most appropriate name(s) for the route, a pro-active marketing strategy, development of public transport links, and a series of workshops to encourage involvement by local communities and businesses.
- Secure funding for ongoing route maintenance is arguably the single most difficult aspect of any LDR. Examples of mechanisms used to get around this problem summarised in the report are as diverse as LDRs themselves.

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| Table of Contents | | Page |
|--------------------------|---|-------------|
| 1. | INTRODUCTION | 1 |
| 1.1 | Background | 1 |
| 1.2 | Aims and objectives of the socio-economic study | 1 |
| 1.3 | Methodology | 2 |
| 1.4 | Route alignment | 2 |
| 2. | TARGET AUDIENCE – WHO IS LIKELY TO USE THE ROUTE? | 4 |
| 2.1 | Local demand | 4 |
| 2.1.1 | Walking | 4 |
| 2.1.2 | Cycling | 4 |
| 2.1.3 | Horse-riding | 4 |
| 2.2 | Long distance walkers | 5 |
| 2.2.1 | Profile of long distance walkers | 6 |
| 2.3 | Pilgrims – a brief insight into potential pilgrimage use | 7 |
| 2.4 | Other visiting walkers | 8 |
| 2.5 | Visiting cyclists | 8 |
| 2.6 | Visiting horse riders | 10 |
| 2.7 | Summary conclusions re. who is likely to use the proposed route | 10 |
| 3. | FACTORS AFFECTING ROUTE USAGE | 11 |
| 3.1 | Factors which influence popularity of long distance routes | 11 |
| 3.2 | Scotland’s Great Trails | 11 |
| 3.3 | European Ramblers Association Leading Quality Trails | 12 |
| 3.4 | Pilgrimage routes | 12 |
| 3.5 | Assessment of Mull LDR in relation to criteria | 13 |
| 4. | EXISTING AND POTENTIAL VISITOR PROFILES, SPENDS AND TRENDS | 16 |
| 4.1 | VisitScotland | 16 |
| 4.2 | Holiday Mull and Iona Visitor Survey Autumn 2011 | 17 |
| 4.3 | Mull and Iona Community Visitor Survey 2012 | 17 |
| 4.4 | CalMac carrying figures | 17 |
| 4.5 | Visitor Attraction Monitor | 18 |
| 4.6 | RSPB Report on economic impact of white-tailed eagles to the Isle of Mull | 18 |
| 4.7 | Sea eagle viewing hide visitor numbers | 18 |
| 4.8 | Holiday Mull | 19 |
| 4.9 | Tourism in Western Scotland 2011 | 19 |
| 5. | PROJECTED USE OF PROPOSED MULL LDR | 21 |
| 5.1 | Extension of the approach adopted by Oban to Tyndrum Study | 21 |
| 5.2 | Comparing proposed route with use of other LDRs and SGTs | 22 |
| 5.2.1 | Variation over time | 23 |
| 5.2.2 | Seasonality | 23 |
| 5.3 | Oban to Fort William Route | 28 |
| 5.4 | Hebridean Way Impact Assessment | 29 |
| 5.5 | Pilgrimage routes | 29 |
| 5.6 | Review of estimated use of Mull LDR | 30 |
| 5.6.1 | Factors likely to positively influence usage of Mull LDR | 30 |
| 5.6.2 | Factors likely to negatively influence route usage | 31 |
| 6. | ACCOMMODATION AND SERVICES | 33 |
| 6.1 | Existing serviced accommodation | 33 |
| 6.2 | Non-serviced accommodation | 34 |
| 6.3 | Occupancy rates for existing accommodation | 34 |
| 6.4 | Gaps in existing accommodation | 35 |

| | | |
|------------|---|-----------|
| 6.5 | Existing services relevant to the route | 35 |
| 6.5.1 | Food and refreshments | 35 |
| 6.5.2 | Baggage transfer | 36 |
| 6.5.3 | Wildlife tours | 36 |
| 6.6 | Scope for development of additional enterprises and services | 36 |
| 6.7 | Limitations on development of accommodation and services | 37 |
| 7. | EVALUATION OF THE POTENTIAL ECONOMIC BENEFITS OF ROUTE DEVELOPMENT | 38 |
| 7.1 | Benefits of LDRs to the local economy | 38 |
| 7.2 | Average spend per route user | 38 |
| 7.3 | Length of stay and additional spend factors | 39 |
| 7.4 | Average daily expenditure forecasts | 40 |
| 7.5 | Gross expenditure | 40 |
| 7.5.1 | Displacement | 40 |
| 7.5.2 | Spatial distribution of projected expenditure | 41 |
| 7.6 | Multiplier | 41 |
| 7.7 | Net additional expenditure | 41 |
| 7.8 | Gross value added (GVA) | 42 |
| 8. | REVIEW OF POTENTIAL SOCIAL AND HEALTH BENEFITS OF ROUTE DEVELOPMENT | 43 |
| 8.1 | Health benefits | 43 |
| 8.2 | Role of Mull LDR in achieving Scottish Government targets | 44 |
| 8.3 | Paths to Health | 45 |
| 8.4 | Role of proposed LDR in providing an aspirational goal for health projects | 46 |
| 9. | CONCLUSIONS | 47 |
| 10. | RECOMMENDATIONS FOR FUTURE ROUTE DEVELOPMENT | 50 |
| 10.1 | Statistical survey data | 50 |
| 10.2 | Target audience | 50 |
| 10.3 | Cycle tourism development | 50 |
| 10.4 | Route alignment | 51 |
| 10.5 | Quality of route infrastructure | 51 |
| 10.6 | Accommodation and services | 51 |
| 10.7 | Delivery of health programmes and initiatives | 52 |
| 10.8 | Route name(s) and branding | 52 |
| 10.9 | Marketing strategy | 52 |
| 10.10 | Public transport | 53 |
| 10.11 | Promoting local awareness of the route | 53 |
| 10.12 | Monitoring | 53 |
| 11. | REVIEW OF DIFFERENT FUNDING AND MAINTENANCE APPROACHES ADOPTED ELSEWHERE | 54 |
| 11.1 | Route establishment | 54 |
| 11.2 | Route maintenance | 54 |
| 11.2.1 | Annandale Way | 54 |
| 11.2.2 | Borders Abbeys Way and Southern Uplands Way | 55 |
| 11.2.3 | Fife Coastal Path | 55 |
| 11.2.4 | Hadrians Wall Path | 55 |
| 11.2.5 | Kintyre Way | 55 |
| 11.2.6 | Mull of Galloway Trail | 56 |
| 11.2.7 | Rob Roy Way | 56 |
| 11.2.8 | St. Cuthbert's Way | 56 |
| 11.2.9 | South of Scotland Countryside Trails | 56 |

| | |
|--|-----------|
| 11.2.10 South West Coast Path | 57 |
| 11.2.11 West Highland Way | 57 |
| 11.2.12 West Island Way | 57 |
| 12. REFERENCES | 58 |
| ANNEX 1: APPLICATION OF METHODOLOGY USED IN TYNDRUM TO ECONOMIC IMPACT STUDY TO PROPOSED MULL LDR | 61 |

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1. INTRODUCTION

1.1 Background

Scope to develop a long distance route (LDR) across Mull linking the ferryport from the mainland at Craignure with the ferryport to Iona at Fionnphort has been discussed for many years, both as a stand-alone route and as part of a longer distance pilgrimage route linking Iona with St. Andrews. Following community consultation, the route was identified as a priority in the 2011 Ross of Mull and Iona Community Plan. The main drivers behind the proposal are economic development through tourism and improving access opportunities for local people.

Mull and Iona Community Trust (MICT) set up a steering group to lead on route development, and have subsequently held various public meetings to discuss the feasibility of the route. As part of their advisory role to the steering group, Scottish Natural Heritage (SNH) commissioned a socio-economic study to identify and assess the potential social, health and economic benefits that route development might bring for route users and local communities.

1.2 Aims and objectives of the socio-economic study

The overarching aim of the study, as defined in the statement of requirements, was to research and document the economic, community, social, health and other potential benefits and opportunities associated with development of an LDR across Mull. The resultant report will be used:

- To inform future decisions about route development.
- To support future funding applications associated directly and indirectly with the proposed route.
- To help continue to build community and business support for the project at all levels.

Specific requirements of the study as identified in the brief were:

- A review of the potential social benefits and opportunities for communities on Mull based on successful approaches adopted elsewhere on similar projects. Particular consideration should be given to the promotion and local delivery of Scottish Government 'Healthy Living' objectives as well as other relevant national/local initiatives.
- A brief review of relevant economic studies, existing and forecasted visitor data, management information, relevant academic research and project documents for equivalent proposals and existing and proposed routes to identify user profiles, likely economic benefits, and average spend by route users (along with upper and lower spend bounds).
- Analysis of spend, per user or per km, coupled with analysis of the spatial and temporal patterns of spend, including relevant information on existing and proposed long distance routes.
- Assessment of the number of enterprises and local economies likely to benefit from being within the orbit of the route.
- Identification of the net additional benefits to the local economy from use of the route and scale of these in terms of visitor spend/income, jobs and gross value added, including multiplier impacts, based on projected user numbers/types. A likely benefits profile for the key villages (Craignure, Loch Don, Pennyghael, Fionnphort and Iona), the region and Scotland, including temporal benefits.
- Recommendations for ways to maximise benefits to local economies and communities, such as marketing strategies, delivery of health programmes and initiatives, identification of relevant market gaps and niches based on visitor profile

and visitor expectations, support for local businesses based on successful approaches adopted elsewhere.

- Provide examples of successful approaches implemented elsewhere to funding and delivering long term maintenance that could be applicable to the proposed Mull LDR.

1.3 Methodology

The following methodology, as proposed in the tender and approved by SNH, was adopted in delivery of the socio-economic study:

- Consultation with key stakeholders including MICT, SNH and Argyll and Bute Council. NHS and local doctors' surgeries were also consulted to discuss opportunities and concerns associated with route development, including initiatives to promote walks for health, current and proposed marketing and promotion of walking routes on Mull.
- Identification and review of local businesses, local transport and scope for development through face to face informal interviews and telephone conversations to identify accommodation, food, transport and support services, followed by analysis of gaps in current provision and scope for development.
- Desk-based research to gather data on existing visitor profile, spend and trends relevant to Mull, and perceived potential for development, by consultation with Holiday Mull, MICT, VisitScotland, Caledonian MacBrayne and existing local businesses.
- Desk-based research of comparative studies and surveys on the economic impact of other long distance routes, including John Muir Coast to Coast Trail, Oban to Tyndrum Trail, Fife Coastal Path, Wales Coast Path, Southern Uplands Way and Hadrians Wall Path.
- Consultation with other long distance route managers to review user profile, numbers, economic, health and social benefits, maintenance regimes and funding.
- Analysis, review and reporting of accumulated data.

Although in theory this methodology seemed logical and straightforward, in practice much of the data which it was proposed collecting simply does not exist. Similar problems in lack of baseline data have been identified in previous economic impact studies. Alternative mechanisms and data sources were pursued wherever possible, through extensive further consultation. This report summarises the findings of all the research.

The project brief did not include primary research such as visitor surveys. However due to the lack of any information on cycling tourism on Mull, opportunity was taken whilst on Mull to undertake an ad hoc survey of cyclists, and of other local people and visitors.

1.4 Route alignment

At the time of the study, the alignment of the proposed route was still under discussion, and was beyond the scope of the socio-economic study brief. However, the character and length of the route, and its relationship to communities, existing and potential services, all of which will be determined by alignment, will have very considerable bearing on future usage and consequent economic, health or other benefits. Some consideration of the route currently being considered is therefore essential to this study.

The statement of requirements refers to a potential route corridor approximately 40 miles in length between Craignure and Fionnphort. A longstanding suggestion for route alignment makes use of the old road through Glen More from Strachoil to Pennyghael, running roughly parallel to the A894, switching sides from north to south of the new carriageway from time to time. This is understood to be the route mapped in draft by Argyll and Bute Council and which in broad terms is currently being considered for development as the proposed long

distance walking and cycling route. Other options making use of existing paths and tracks wherever possible were briefly explored during the course of initial visit to Mull, together with associated enterprises and scope for development.

2. TARGET AUDIENCE – WHO IS LIKELY TO USE THE ROUTE?

An understanding of who is likely to use the proposed LDR, how, why and when, is fundamental to any assessment of future social, economic or health benefits. Potential demand for the route, together with a review of capacity and scope for existing access provision to satisfy demand, is summarised below.

2.1 Local demand

Community consultations undertaken by MICT identified the following local interest in route development:

2.1.1 Walking

There is both expressed and latent demand for clearly waymarked safe off-road walking opportunities for local people for daily use for pleasure, leisure, dog-walking, health and fitness. Consultations suggest that what local people particularly want is paths on their doorstep which they can be confident landowners/managers are happy for them to use, of sufficiently gentle gradient for use by young and older people, particularly around Fionnphort and Bunessan. For the majority of local people, the old road through Glen More does not currently fit this bill because it involves a car journey and is too uneven, although a few people already make use of eastern sections of the old road for enjoyable local linear walks, for example from Strathcoil. Occasionally local people from elsewhere on Mull walk other sections of the old road. The core path plan (<http://www.argyll-bute.gov.uk/planning-and-environment/core-path-mapping>) includes four paths in the south of Mull, approximately half of which are on tarmac road.

2.1.2 Cycling

The only promoted cycling routes on Mull at present are forest tracks on North Mull, which are generally considered too far away for those living on the south of Mull to use. The main local cycling interest is in development of a safe off-road cycle path which could be used:

- For local primary school aged children from Bunessan to get to school. Realistically, the time and distance involved is likely to preclude children from other villages using the route to access either Bunessan primary school or the secondary school at Tobermory.
- As a facility to encourage and enable people of all ages to do more cycling on a daily basis for leisure, health or fitness.
- As a facility for families to teach children to cycle in a safe, traffic-free environment, and to provide opportunity for short or longer cycle rides at the weekend and in school holidays.
- As a goal to inspire people from all over Mull to get fit enough to cycle the whole route

2.1.3 Horse-riding

Under the Land Reform Scotland Act, horse riders enjoy similar rights of access to most paths, tracks and other land as walkers and cyclists, although often have more difficulty exercising their rights due to boggy ground, locked gates or other physical obstacles. Identifying horse accessible off-road riding routes can also be difficult, and tends to rely on word of mouth. There are currently no promoted horse-riding routes on Mull. Some local riders transport their horses to ride on the Ross of Mull beaches.

The main local equestrian demand for the route is likely to come close to where people currently keep their horses. For example, one or two secondary school students are

understood to have expressed interest during community consultations in scope which the route might provide for off-road horse riding around Fionnphort. There are few, if any, horses kept locally within immediate reach of the remainder of the proposed route. The extent to which riders from elsewhere on Mull may be interested in using the route will depend on how much off-road riding they have on their doorstep, parking facilities suitable for trailers or horse boxes, the character of the route, and scope for development of a circular route. In general, linear routes and those which are hard surfaced which limit speed to mainly walking are less popular than more varied circular routes or those offering scope for all paces.

2.2 Long distance walkers

Long distance walkers are one of the primary target audiences for the proposed route. Experience with other routes suggests that some walkers may complete the whole route over a number of consecutive days, whereas others may opt to tackle a section of the route on each visit. Although usage of individual routes varies, overall interest in LDRs and the number of people walking them is generally on the increase.

Experience elsewhere suggests that far from having reached saturation point, the LDR market continues to increase annually, with a burgeoning number of 'serial LDR users' or 'route baggers' whose main preoccupation as they finish a route is which to tackle next. Survey during 2012 by route managers (unpublished) of visitors using the West Highland Way revealed that 40% had already walked another LDR in Scotland, and 80% would do the whole of the West Highland Way again. 2006 survey of the same route found that half of all respondents had used other LDRs in the UK in the last 5 years and 75% planned to walk other LDRs in the next 5 years. The latest annual survey of the Great Glen Way (unpublished) revealed that 53% of walkers using the Great Glen Way have also walked the West Highland Way, 8% Southern Uplands Way, 5% Speyside Way and 34% other LDRs. The Fife Coastal Path User Survey (TNS Travel and Tourism, 2007) indicated that 42% of all route users had walked the West Highland Way, and 63% of route users were aware of other LDRs. Online and postal survey of National Trails in England and Wales in 2007 (Natural England, 2013) identified 33% of respondents as serial National Trail users.

Route managers suggest that other factors contributing to the increasing interest in LDRs include:

- the current recession prompting "staycations" in preference to previous holidays abroad;
- increasing interest in health and fitness;
- ready availability of baggage transfer and support services;
- increasing range of packaged deals for long distance routes which make booking accommodation and travel quicker and easier, which particularly appeals to cash-rich time-poor visitors;
- ease of finding information via the internet;
- more effective and pro-active marketing of LDRs individually and collectively through Scotlands Great Trails (SGT) branding;
- positive impact of TV and wider media coverage of different parts of Scotland.

Other national tourism trends which are likely to positively influence LDR usage identified by Tourism Intelligence Scotland in their May 2013 briefing (Tourism Intelligence Scotland, 2013) include:

- despite the recession, household budgets for leisure appear to be reserved;
- increasing popularity of adventure and activity tourism, with visitors looking for something 'more than just a holiday', seeking to maximise their experiences and gain additional value for money from their breaks;

- scope for LDRs to meet increasing demand for multigenerational travel, family markets and empty-nesters preferring a broader experience from their holiday;
- air passenger duty costs are becoming an increasing deterrent to foreign travel.

This does not by any means guarantee that all LDRs will necessarily succeed. No matter how much time, effort and resources has been invested into their development, routes which fall into the 'worthy but boring' category are never likely to attract high levels of use from visitors. The Wolds Way in North Yorkshire is a case in point. Those LDRs which fail to recognise and respond to the needs and interests of route users in terms of route design, accommodation and service provision are also unlikely to succeed. Further consideration of the scope of the proposed LDR to meet long distance walkers' needs is explored in Chapter three.

2.2.1 Profile of long distance walkers

The profile of route users varies to some extent, but surveys on other LDRs offer some indication of the type of user the proposed Mull LDR might attract.

The Great Glen Way is one of the few LDRs in Scotland to undertake a fairly comprehensive annual user survey. Results of the 2012 survey (unpublished) revealed:

- 65% route users arrived at the start by public transport.
- 29% of walkers are from Scotland, 31% from elsewhere in the UK, 31% from Europe (increase of 5% from previous year) and 9% rest of the world.
- 54% of walkers are in pairs or couples, 22% walking alone, 15% in a group of 3-4, 3% groups of 5.
- 54% male, 46% female (latter figure has increased 1% annually for past few years).
- Age: 30% 35-50, 29% 18-34, 26% 51-64, 8% 65+, 7% <18.
- 93% walk the route west to east.
- 18% walk the West Highland Way and Great Glen Way simultaneously.

Survey of the Southern Upland Way (Crichton Tourism Research Centre, 2004) revealed very similar figures:

- Over two-thirds of route users were UK residents, with the majority of the remainder from Western Europe.
- More than half fell into the 45-65 age range.
- 56% were male and 44% female.

A very comprehensive path usage and economic impact study was undertaken in relation to the Fife Coastal Path between 2006 and 2007 (TNS Travel and Tourism, 2007), which found that:

- 52% of users were on a short trip from home, 20% on a day out, 26% on holiday.
- 81% of survey respondents had previously visited, with 46% visiting at least weekly in summer and 38% this frequently in winter.
- Nearly 2 in 5 respondents (38%) spent an hour or less on the path on the day they were interviewed, a further 29% spent 1-2 hours, reflecting the very high level of local use, often on a daily or weekly basis.
- 54% of users were from Fife, 31% from elsewhere in Scotland, 9% from elsewhere in the UK and 4% from overseas.
- Of those on holiday, 55% lived in Scotland, 32% elsewhere in the UK and 13% overseas.
- Almost half of all users were aged 55 or over, many of them classified as "empty nesters" (55 or over with no children at home).

- 67% were classified as employed in professional, managerial and non-managerial occupations, reflecting the higher level of activity in outdoor recreation of ABC1 social classes.
- 9% of Scottish adults had visited the path, a similar figure to the West Highland Way, compared with 4% having visited the Great Glen Way and 2% the Southern Upland Way. Since the survey, many more LDRS have opened up.

2.3 Pilgrims – a brief insight into potential pilgrimage use

Recognised worldwide as the birthplace of Christianity in Scotland, Iona already inspires numerous pilgrimages, ranging from individuals who have designed their own journey, to large-scale more formally organised pilgrimages such as the 2013 Iona to London Pilgrimage for Peace and Economic Justice (www.justpeacepilgrimage.com). In Holy Week each year, Scottish Cross organises an annual ecumenical cross-carrying pilgrimage to Iona. Two separate groups of 25 people set off from Fort William and Loch Lomond to converge at Oban before crossing to Mull. Scottish Cross is all about a journey through wilderness, and hence follows the rugged southern coastline of Mull. In the absence of any promoted route, other pilgrims looking for an easier route simply walk along the road from Fionnphort to Craignure. The Stevenson Way is apparently rarely used by pilgrims because of the significant challenge it presents, and lack of waymarking.

The Scottish Pilgrim Route Forum (SPRF) (<http://www.sprf.org.uk/>) suggest that there is a high level of interest in a cross country off-road pilgrimage route across Mull, which is likely to stimulate and attract significant interest both in its own right, and eventually as part of the proposed 185 mile pilgrimage route from Iona to St. Andrews. A sub-group is now working on development of this coast to coast pilgrimage route, utilising core paths wherever possible. The first priority is to get people walking the route on a systematic basis after which the route will be fine-tuned. It is hoped that by spring 2014 initial sections will be open to whet the appetite for the complete route. SPRF suggest that those interested in the religious aspects of the pilgrimage route and/or who are following the whole route to St. Andrews are more likely to walk west to east, following the development of Christianity from its origins on Iona to newer sites further east. Pilgrims walking only the Mull section may travel in either direction.

John Henderson of Walking Support estimates that 80% of walkers booking through his company for supported walking tours on St. Cuthbert's Way are pilgrims, which in part reflects the company's international reputation for organising successful pilgrimages. Scandinavian groups of pilgrims are increasingly common, but there is also increasing demand for long distance pilgrimage routes from North and South America, and other countries such as South Africa. Return visits to the same route are very common, often annually, often with the same leader but different participants.

Recent investment by Historic Scotland in rebranding Iona as a pilgrimage destination may add to pilgrimage interest in the proposed Mull LDR. One of the key points to note is that not all pilgrims are committed Christians. A high proportion are more concerned with spirituality or questioning values in life. It is also important to recognise that by far the majority of walkers are inspired to follow pilgrimage routes for entirely different reasons, including broader historical interest. During several day surveys of 100 route users on St. Cuthbert's Way in 2011 (Wood-Gee, unpublished), none of the walkers interviewed were walking the route for religious reasons, but appreciated the added interest which the association with St. Cuthbert provided. Similarly relatively few of the hundreds of thousands of walkers following the Camino de Compostela or inspired to walk parts of the Via Francigena do so for religious reasons.

Although it is usually only those following specific pilgrimage routes who are usually described as pilgrims, in many respects all long distance walkers and cyclists could be said to be on a pilgrimage, regardless of the religious or historic interest of the route they are travelling in that they are on an adventure, a journey to change themselves or a personal quest, even if that quest is simply to complete the route. The individual profile of pilgrims is as varied as that of any other route users, ranging in age from 10 to 80, with the majority mid-20s to early 70s, and average age approximately 55. It is a common misconception that pilgrimage routes attract a higher number of people with physical mobility issues. Most are relatively physically able, but level of fitness often causes more of a problem than condition of paths.

Pilgrimage routes are most commonly designed as walking routes, or aimed at walkers, emulating the first pilgrims, but there is increasing interest from cyclists. One accommodation provider on Mull commented on a visiting group of cyclists from Holland following a pilgrimage route to Iona, and a member of the Iona to St. Andrews pilgrimage route working group is understood to have teamed up with a European cycling project to explore options for a separate cycling route to compliment the proposed walking route.

2.4 Other visiting walkers

Consultations with accommodation providers suggest that most of their guests express some interest in walking, and often ask for recommendations, but other than hill walkers who have done their homework in advance, many visitors walk only a short distance across Iona, along a quiet road, or on beaches.

Informal discussion with a range of visitors on Mull identified that some (particularly from outwith Scotland unfamiliar with Scotland's access rights) are reluctant to venture forth across farmland or even moorland without first determining that they are entitled and welcome to do so. For those who prefer to follow recommended routes rather than risk following their nose or a map, three or four different books describing walks of different lengths are on sale in the Tourist Information Centres at Oban and Craignure, and are also available via the internet. The Ross of Mull Historical Centre has produced a series of walks books for the area, most of which are waymarked by small stones carved and donated by Historic Scotland.

Signage, waymarking and promotion of the proposed LDR has the potential to attract visiting walkers across a broad range of ages and abilities, including:

- people already on holiday on Mull looking for a recognised route to follow during their stay;
- existing visitors inspired to return or stay longer in order to walk part or all of the LDR;
- visitors attracted to Mull specifically by the route;
- visitors looking for extra outdoor activities which can be combined with other attractions such as the sea eagle hide.

Experience on other LDRs suggests that many of those who discover an LDR almost by accident, for example after seeing a fingerpost, waymark or interpretation panel, are inspired to return and walk more of the route.

2.5 Visiting cyclists

No statistical information is available on the level of demand for an off-road cycling route across Mull, or indeed regarding any aspect of cycle tourism on Mull. Analysis of cycling demand is therefore based on consultation with Mull Cycling Club, local businesses and ad hoc interview of cyclists.

Visiting cyclists can be broadly categorised as follows:

- Individuals and groups travelling to Mull with their own bikes (road, touring, hybrid and mountain bikes) specifically to cycle around or across the island. The majority of this group travel by train or vehicle to Oban, leaving vehicles at Oban. From Craignure, the most popular route is west along the A849 and then along the B road up the west of Mull, either circling back round to Craignure or Fishnish (often as a day trip), or catching a ferry from Tobermory to Kilchoan and then looping back to Oban via Corran Ferry and the Fort William to Oban cycle route as a 2-4 day circular trip. Those who include a spur to Iona in their trip usually stay overnight at Fionnphort (camping or serviced accommodation). Some visiting cyclists also come to Mull specifically to cycle from Craignure to Iona, without visiting the north of the island.
- Holidaymakers who either bring their own bikes with them or hire bikes on Mull for occasional short cycle trips, usually on road, which in part reflects lack of promoted off-road cycling routes.
- Mountain bikers, usually individuals, couples or small groups, some of whom travel to Oban by train, or leave their vehicles at Oban, but the majority of whom bring their own bikes over to Mull on their vehicle to do day or part-day mountain bike rides, on or off tracks. The most serious mountain bikers looking for real challenge may not be interested in a surfaced off-road recreational route, although the proposed LDR would complement other mountain bike routes.
- Cyclists coming to Mull specifically to take part in cyclesportives or other organised events. A long distance off-road route would offer scope for development and promotion of a range of cycling events in future, but is unlikely to be used for road-based sportives.

Opinions are divided as to the level of demand for an off-road alternative to the A849 amongst touring cyclists. Numerous local businesses and residents felt that off-road cycle route development is essential from a safety perspective, as epitomised by comments such as *“Those poor cyclists risking life and limb cycling along that road”*. Argyll and Bute Council have no recorded incidents of cyclists being injured on the A894 in the past five years. The equipment used to monitor traffic records speed, time, date and length of vehicle but is insufficiently sensitive to record bicycles. The latest available survey data is from early spring 2012 when the average daily (i.e. over 24 hr period) flow of vehicles was 68 cars and 13 HGVs (>6m) westbound, with similar figures eastbound. Compared with many roads elsewhere in Britain, this level of vehicular traffic is low, although can be much higher during the summer season (for which no figures were available). Vehicle flow on the A849 is also typically concentrated by ferry times, with a steady stream of traffic coinciding with arrival of ferries at Craignure and Fionnphort as vehicles travel between the two. Regardless of the statistics, comments from local consultees such as *“cyclists are a danger on these roads, an accident waiting to happen”* reflect genuine concern about the safety risks and frustration of having to swerve or slow down to avoid cyclists on a single-track road, particularly through Glen More.

The consensus amongst the cyclists interviewed was that they did not feel endangered and pulling aside to allow vehicles to pass was far preferable to the loss of momentum on an off-road route with steeper gradient, less ideal surface for cycling and frequent kerbs, particularly if it was a combined walking-cycling route which they felt would be slower and more frustrating for both cyclists and walkers than current cycling along the road. Comments included *“I’ve seen less traffic on Mull in the last 24 hours than I would meet in half an hour even on the back roads where I live”*. However, as one local consultee pointed out, although there may be less traffic on the roads of Mull than in many other parts of the country, the traffic volume is at times high in relation to the conditions i.e. narrow, single tracked roads of variable surface quality, few passing places, blind spots and some steep gradients. Other

cyclists - particularly those in less of a rush, keen to avoid traffic or with children - might well think differently and welcome a less risky, more sedate off-road multi-use route.

The Camel Trail between Wadebridge and Padstow and Tarka Trail in Devon are but two of many positive examples of traffic-free cycle routes elsewhere in Britain which have become tourist attractions in their own right which have proved particularly popular with families. Although these are in areas attracting significantly higher visitor numbers, the length of the trails is much shorter and other trail characteristics differ, there seems little doubt that development of an off-road cycling route between Craignure and Fionnphort could potentially open up a new tourism market on Mull, subject to satisfying other essential criteria. The extent of latent demand for such a route is difficult to quantify.

2.6 Visiting horse riders

Realistically the number of horse owners likely to take their horse to Mull specifically to ride the proposed LDR is very limited. The cost of transporting horses on the ferry is only likely to be justified for good quality off-road riding, including scope for variety of pace, which is unlikely to be possible on the proposed old road. Riders are also unlikely to be interested if significant proportions of the route remain on or alongside the road. As noted above, the lack of circular route options is also likely to limit demand from visiting equestrian users.

2.7 Summary conclusions re. who is likely to use the proposed route

Route alignment and characteristics will have a very strong bearing on who uses the route and how, but in summary, key interest in using the proposed Mull LDR is likely to come from:

- LDR walkers who may walk the route in one go or in sections over a period of time.
- Pilgrims, both as a standalone pilgrimage route, and as part of the longer distance Iona to St. Andrews route.
- Cyclists of all ages and abilities who prefer not to cycle on the road but are not seeking the thrills and spills challenges of mountain biking.
- Visiting walkers looking for a clearly waymarked safe off-road route which they can enjoy whilst on holiday on Mull as part of a range of other activities.
- Local people of all ages and abilities keen to enjoy a relatively level, clearly defined off-road route on foot, cycle or horseback.

Above and beyond these discrete types of use there is considerable interest in and scope for development and promotion of the route for multi-activity, for example walking from Craignure to Carsaig, sea kayaking to Fionnphort and cycling back to Craignure, or a combination of all three activities in one direction only. One of the companies which currently runs multi-activity trips along the West Highland Way and Great Glen Way has confirmed that the proposed Mull LDR would be of considerable interest to their clients.

Notwithstanding the anticipated limitations on level of use by horse-riders, in keeping with good practice and the principles of the Land Reform (Scotland) Act, the least restrictive option in terms of access controls and facilities should be adopted wherever possible.

3. FACTORS AFFECTING ROUTE USEAGE

3.1 Factors which influence popularity of long distance routes

Research commissioned by SNH (Wood-Gee, 2008) identified a series of criteria essential to the success of LDRs. Although the detail may differ for different types of user, the basic criteria are fairly consistent for walking, cycling and horse-riding routes. Combined with more recent experience from many other LDRs, the following factors have been identified as contributing to the success of LDRs:

- Routes through **iconic landscapes**.
- **Attractive scenery**. More than one-third of the Great Glen Way user survey said that scenery was the most enjoyable part of the journey. Routes enclosed between conifers for long stretches with no outward view are not popular.
- **Variety in scenery and terrain**. The ideal is a change in scenery at least every half day. Some walkers using the Great Glen Way, for example, comment that although the view is spectacular, it is constant throughout, whereas on the West Highland Way the view is constantly changing.
- **Challenging** but not too over-daunting e.g. 35% of West Highland Way walkers did the route primarily because it was challenging.
- **Minimum distance on road** or bound surface.
- For **walking routes, informal but well drained path**. Most LDR walkers prefer an accessible path which retains a feeling of intimacy rather than feeling as though they are on a motorway.
- **Good waymarking and clear signage**.
- **High overall route** quality in terms of infrastructure (which needs to be maintained as such – word quickly gets round and usage declines if problems arise).
- **Historic and other interest** along the route.
- **Start and finish point readily accessible by public transport**. The importance of this factor is reinforced by increasing popularity of public transport for travel to destinations, as reported by Tourism Intelligence Scotland in their May 2013 briefing (Tourism Intelligence Scotland, 2013).
- **Distance achievable in less than a week**.
- **Easily divisible into sections** which can be walked independently, ideally as circular routes or with public transport back to starting point.
- **Availability of support services** e.g. baggage transfer.
- **Suitable accommodation spaced at intervals** reflecting distance most users wish to travel in a day, approx. 16-24km (10-15 miles) for walkers and 40-80km (25-50 miles) for cyclists, although some touring cyclists will happily cycle >80km (50 miles) per day.
- **Readily available food and refreshments** suitably spaced along the way.
- **Within relatively easy reach** (maximum two hours) of large numbers of people.
- **Effective marketing**.

3.2 Scotland's Great Trails

Scotland's Great Trails (SGT) has been developed as an elite branding for the best quality LDRs. SGT branding offers route users reassurance as to what they can expect, and offers route managers opportunities to raise the profile of their routes through targeted national marketing campaigns. The standards set by SGT also provide a useful yardstick for route developers. To qualify for SGT branding, the proposed Mull LDR would need to meet the following criteria:

- Be a continuous, clearly identifiable and appropriately waymarked route between defined start and end points (or defined access points in the case of circular routes).
- Be largely off-road (<20% on tarmac).

- Be at least 40 km / 25 miles in length and have potential for multi-day journeys by foot, cycle and/or on horseback.
- Offer at least a basic range of visitor services, with information on the route, facilities and services available to users in appropriate formats.
- Offer opportunities to appreciate the natural, cultural and historic interest in the area through which the route passes.
- Be designed, maintained and managed with user experience as a key consideration.

3.3 European Ramblers Association Leading Quality Trails

Drawing on years of practical experience of what makes a good walking route, the European Ramblers Association (ERA) has developed 'Leading Quality Trails' as a transparent system for the improvement of long distance trail quality throughout Europe. The criteria on which the assessment system is based reflects the needs of walkers, and all of the other factors which contribute to the most successful LDRs. As such, the criteria provide a useful checklist, as well as an aspirational benchmark for route developers. The overall aim is to encourage and promote informal fit-for-purpose paths. To achieve accreditation, in return for a fee, routes are systematically surveyed and scored according to specified criteria. The most relevant to the proposed Mull LDR are:

- **Length:** routes must be at least 50 km split into at least three daily stages.
- **Accommodation:** available at the start and end of each daily stage. Where no accommodation is available directly on route, there must be pick-up facility to transfer to other local accommodation.
- **Trail surface:** the aim is for the majority of the route to be natural, non-engineered paths without artificial fortification, or artificial non-sealed surfaces. Sealed surfaces (e.g. tarmac, concrete, pavement) are only acceptable where unavoidable, for a maximum of 20% of the route or 3,000 m continuously. A maximum of 5% of the overall route may be uneven but passable.
- **Proportion on busy road:** maximum 3% of the overall route or 300 m continuously.
- **Signage and waymarking:** with fingerposts at all road junctions showing details of destination, direction and distance, and intermediate waymarks at appropriate intervals to confirm the route.
- **Variety in nature/landscape:** points of natural beauty (e.g. summits, gorges, ravines, rocks, caves, waterfalls, natural heritage sites) and natural water (burns, rivers, lakes, bogs etc.) all contribute to positive scoring in route assessment.
- **Natural quietness:** maximum 1000 m in 4 km section with machine or traffic noise.
- **Panoramic views:** viewpoints with minimum 45 degree opening and 2,000 m visibility.
- **Local attractions** on or close to the route e.g. cultural and historical sites of local and/or regional importance.
- **National attractions** e.g. castles, monasteries, national monuments.
- **Service provision:** shops and/or cafes open from midday at least five days per week.
- **Resting places** e.g. picnic benches, tables, service areas.
- **Regular public or private transport service** to points along or within reach of the route.
- **Walker friendly start/finish points** with at least one information board about the route.

3.4 Pilgrimage routes

"The essence of a pilgrimage is a journey made in a spirit of searching, with openness to what the journey can teach.... It can be made in the context of an established faith such as Christianity, to a world famous site, or it can be made for other reasons." (Welch, 2009)

Although little if any hard statistical data is available determining criteria essential to the success of pilgrimage routes, much can be learned from experience of other pilgrimage routes in the UK and abroad. Based on discussions with the SPRF, review of various books on the subject of pilgrimage, and drawing on research undertaken as part of a Churchill Travelling Fellowship (Wood-Gee, 2010) the following factors have been identified as important to successful pilgrimage route development:

- Journeys to or incorporating sacred sites were historically the focus of all pilgrimages. Routes which both start and finish at sacred sites (e.g. Canterbury-Rome or Canterbury-Santiago de Compostela), or which link a variety of relevant sites, are generally more popular than routes with no specific start point.
- Incorporation within the route of relevant sites e.g. holy wells.
- Routes with a long history of use, and evidence of such use along the way.
- Opportunity for quiet contemplation and reflection along the route; *“space to step aside from the circumstances of their lives in order to reflect upon them”* (Welch, 2009). Quiet paths through attractive scenery are likely to be more popular as pilgrimage routes than routes which include long stretches on or alongside public roads, or where noise of traffic, machinery or developments will intrude on pilgrims’ enjoyment. Other people using the same route is not an issue: meeting other pilgrims is often an important part of pilgrimages.
- Physically and mentally demanding for individual pilgrims, which may be to do with length of route (e.g. pilgrimage routes over several hundred miles) as much as physical ardour, but routes with some physical challenge are generally more popular.
- Availability of baggage transfer: most pilgrims nowadays are interested in walking, not doing penance.
- Ready-identified suitable locations for meditation or services. Some routes offer suggested subjects, or links to local churches or ministers willing to conduct services on route. Holy Island offers two daily services specifically for visiting pilgrims.
- Sufficient accommodation to cater for groups of pilgrims (usually mixed gender, group size typically varying from 15-20), not necessarily all in the same place, but with scope to eat together in the evening.

In general, pilgrims are often prepared to put up with less than ideal walking conditions with the compensation of a pilgrimage focus, but as experience in Denmark has demonstrated (Wood-Gee, 2010), as with any other kind of route user, failure to acknowledge the interests and needs of pilgrims is unlikely to lead to development of a successful route.

3.5 Assessment of Mull LDR in relation to criteria

The potential for the proposed Mull LDR to satisfy each of the proposed criteria is assessed briefly below. Assessment relates mainly to the draft route as proposed at the time of the study, using the old road through Glen More.

Table 1. Assessment of Mull LDR in relation to criteria essential to success of LDRs.

| Factor | Key considerations | Implications for Mull LDR as walking route | Implications as a cycling route |
|-----------------|------------------------------------|--|---|
| Length of route | Achievable within less than a week | At approx. 64km (40 miles), the proposed route is comparatively short for an LDR but taking approx. 3 days for the average | 64km would take max. 1 day for most touring cyclists, hence questionable whether it is genuinely a cycling LDR, but scope for promotion as a there- |

| | | | |
|---|--|---|--|
| | | walker, would be achievable within a short break which may add to its appeal. | and-back route incorporating trip to Iona, or as part of 3-4 day circular route around Mull |
| Daily stage length (distance between accommodation) | 16-24km (10-15 miles) max. for walkers, 40-48km (25-30 miles) for cyclists (allows scope for fitter cyclists to double up or combine or stages if preferred) | Lack of accommodation and approx. 32km (20 mile) stage through Glen More will offput many walkers. Lack of mobile reception to co-ordinate pick-up for transfer to other accommodation. Routing via Lochbuie would make daily stage lengths viable. | No problem for cyclists |
| Proportion on sealed surface | Max 20% on roads or pavement | Using route currently proposed, very high proportion on or alongside road, or on pavement. | No problem for cyclists but begs the question as to whether it can claim to be an off-road cycle route if long sections either end of Glen More remain on road. |
| Scenic variety | Change in view every half day | High but greater still incorporating coastal sections. | High |
| Surface | Cyclists prefer bound or hard level surface, walkers prefer natural surface | Sections of old road fine as they are for walkers, but far less suitable if resurfaced, particularly with tarmac. Alternative routing via coast and other tracks would provide good variety in surface. | Old road through Glen More unattractive to most cyclists other than MTBs without upgrading. Existing road appreciated by some cyclists (much to amusement of roads department who receive ongoing complaints from local motorists!). |
| Availability of refreshments | Ideally cafe/shop every 8km (5 miles) for walkers, min. every 32km (20 miles) for cyclists | Lack of any services and very limited scope to develop through Glen More presents real issue. Shop at Lochbuie potentially presents option on coastal route. | Shop at Pennyghael and services at Bunessan provide adequate facility for cyclists, although less fit/able/younger cyclists would no doubt struggle with distance between services through Glenmore. |
| Availability of baggage transfer and other back-up services | Bookable in advance with pick-up from all accommodation options | None at present but taxi firm confirmed interest and potential business opportunity. | |

| | | | |
|---|---|---|---|
| Sense of achievement | | High | |
| Logical purpose | Credible reason for route | Irrespective of religious or spiritual interest, concept of pilgrimage route from/to Iona confers credibility to route concept. | |
| Accessibility of start/finish points | Ideally accessible by public transport | Road, rail and coach options to Oban, regular ferry service to Craignure, with buses coinciding with ferry times between Craignure and Fionnphort. | |
| Clearly defined route | Clear waymarking and signage essential to give users confidence | None at present along old road, some sections of coastal path waymarked. | None at present along old road. |
| Balance between challenge and ease of walking/cycling | Sufficient to feel you've done something, without being too demanding | Proposed route along old road risks not presenting sufficient challenge. | Subject to development of suitable off-road route would provide ideal combination of challenge and relative ease of use for cyclists. |
| Historic and natural heritage interest | | High in every regard whichever route is chosen. | |
| Accessibility to large numbers of people | | Travel time from majority of Scottish population relatively high (approximately 3.5 hours by car/ferry or 4.5 hours by public transport and ferry from Glasgow to Craignure). | |

4. EXISTING AND POTENTIAL VISITOR PROFILES, SPENDS AND TRENDS

The main economic benefits of route development are likely to derive from visitor rather than local use of the proposed Mull LDR. The aim in researching and collating data about existing and potential visitor profiles, spends and trends was to generate an overview of existing tourism and to provide baseline information from which opportunities for development and niches which might be exploited could be identified, and to segregate out displacement of existing visitors. The many different avenues pursued in pursuit of relevant data have confirmed the lack of accurate information on visitor numbers to Mull. The limited data which it has been possible to obtain is summarised below.

4.1 VisitScotland

Consultation with VisitScotland at local and regional level confirmed that the only data available specific to Mull is footfall through Craignure Visitor Information Centre which totalled 80,819 between 1st April 2011 and 31st March 2012. The seasonal profile of visitors passing through the information centre has remained relatively static since 2009, relatively low in the winter months, rising sharply at Easter but then falling back until Whitsun, and then predictably peaking in July and August. Absolute numbers have reduced by approximately 20% since 2010. Information about occupancy rates is limited to bookings through TIC, which VisitScotland acknowledge represents only a small proportion of total bed bookings on Mull (or elsewhere in the region), and as such they are very reluctant to divulge figures.

The most recent visitor data at a regional level is from the 2011 Scotland Visitor Survey, (TNS Research International, 2011) based on fieldwork conducted from July to October. Over this period 1,882 overnight leisure visitors were surveyed including 540 visitors to Argyll and the Isles. The national tourism volume surveys recorded 1.8 million tourists visiting Argyll, the Isles and surrounding regions in 2010, with most visitors from Scotland or other parts of the UK, and the largest overseas markets from Germany and the USA. VisitScotland commented that the number of Europeans visiting the region has since declined due to flight changes e.g. loss of direct flights from Scandinavia to Glasgow. VisitScotland also noted that in the last two years, the previously high number of visitors from northern England has decreased, whilst the number of visitors from southern England has stayed the same, which somewhat contradicts suggestion that decline may be due to increased fuel and travel costs.

The age profile of visitors to the region was identified by the Scotland Visitor Survey as similar to that of Scotland as a whole with 29% aged under 35, compared to 32% of all Scottish visitors. Over two in five visitors to Argyll and the Isles (44%) visit the area as part of a wider tour of Scotland, with two thirds spending one or more nights in the area. Among these visitors, the average length of stay is 4.8 nights. Almost half (48%) of overnight visitors stay in the area for one to three nights. 34% stayed for 4-7 nights and 18% stayed longer. Two thirds of visitors (66%) visited any Scottish islands during their visit, with a notable 37% visiting Mull. The most popular activities on visits to Argyll and the Isles were sightseeing, trying local food and gentle walks. One of the two comments on the regional summary of the survey provided by VisitScotland is highly relevant to the socio-economic study:

"I wanted a map that would show me good walks to take when I got off the ferry on Mull."

This reiterates similar spontaneous comments made during informal interviews with walkers during the consultant's visit to Mull as part of this study.

4.2 Holiday Mull and Iona Visitor Survey Autumn 2011

A questionnaire survey of 80 visitors was undertaken during September 2011 using a combination of intercept survey on departing ferries at Craignure and questionnaires distributed through accommodation establishments. The relatively small sample size and breadth implies a statistical margin of error of around 10%. The timing of the survey may have skewed results with self-caterers under-represented mid-week. Families with school age children are also unlikely to be accurately represented by survey outwith school holidays. Nevertheless, some relevant points can be deduced from the survey in relation to visitor profile and interests. Those of most relevance to the proposed LDR are:

- Walking was by far the most popular activity undertaken, by 78% of respondents.
- Age: Approximately half of those interviewed were over and half under 55 years old.
- Group size: around 3 out of 4 respondents were couples, the remainder with family or friends.
- Half were first time visitors.
- 90% stayed more than one night
- 40% identified themselves as being from the north of England, 25% from Scotland and the remainder from the rest of England and Wales.
- The majority spent between £100 and £500.
- 96% particularly like the scenery.
- 87% of respondents will return (56% definitely, 31% hopefully).

4.3 Mull and Iona Community Visitor Survey 2012

A further survey (Holiday Mull and Iona, 2012) was carried out during May and June 2012 to gain a better understanding of the needs and views of visitors to Mull and Iona to support the bid for the Business Improvement District project and any future tourism development plans. The survey was conducted by asking departing visitors waiting in the Craignure ferry queue to complete a questionnaire devised by members of the BID steering group and the Holiday Mull and Iona committee. This methodology excluded day trippers and foot passengers but five of the total 209 respondents (2%) were cyclists. Overall the survey confirmed and expanded many of the findings of the 2011 survey regarding visitor profile and experience, and yielded the following information relevant to LDR development:

- Only 1% of respondents noted walking as one of the activities undertaken during their visit, with no readily apparent explanation for the very significant contrast with 78% of respondents having walked as part of their visit in 2011.
- 14% of respondents had been on a guided walking trip on their visit.
- Response to open questions as to how their visit might be improved included request for better signage on walks and provision of safe cross country cycling.
- Requests for activities respondents would have liked to undertake but were unavailable included more information on walking paths, more hiking and walking, guided walks and cycle hire.

4.4 CalMac carrying figures

Given that nearly everyone visiting the islands has to travel by ferry, Caledonian MacBrayne's (CalMac's) annual carrying figures, which are published on the CalMac website, are a potential reference point for assessing visitor numbers. No breakdown is available to differentiate between visitor numbers and local or business ferry carryings. Cyclists are included within total passenger numbers, but regrettably as no charge is made for transporting cycles, CalMac do not currently record the number transported.

Table 2. CalMac annual carrying figures 2012.

| Crossing | Total passenger nos. |
|--|----------------------|
| Oban-Craignure | 549,356 |
| Fishnish – Lochaline | 110,714 |
| Tobermory – Kilchoan | 34,183 |
| Total passenger nos. 2012 between Mull and mainland | 694,253 |
| Fionnphort to Iona | 213,540 |

4.5 Visitor Attraction Monitor

The 2009 Visitor Attraction Monitor (VisitScotland, 2009) compiles national statistical performance indicators for 700 of Scotland's top cultural attractions. Data is readily available up to 2009, until which time reports were commissioned by VisitScotland, but since when supply of data is on a commercial basis. Visitor numbers in 2009 to the three attractions monitored on Mull were 33,859 to Duart Castle, 1,005 to Ross and Mull Historical Centre at Bunessan and 60,133 to Iona Abbey and St. Columba Centre. These figures suggest that approximately 60% of all foot passengers to Iona visited the Abbey in 2009, based on CalMac carrying statistics of total foot passengers for the year of 232,215 on the Fionnphort to Iona crossing, reduced to 116,107 assuming all are return crossings. No more accurate figures are available regarding percentage split between local and visitor numbers in relation to recorded ferry passenger numbers, although consultation with MICT pointed out that not all visitors to Iona necessarily visit the Abbey. Given Iona's resident population amounts to only 120, consultations suggest that estimation of a maximum of 20-30% of ferry passenger numbers are local/business use is not unreasonable.

Press releases by Historic Scotland in early September 2013 report 13.5% rise in visitor numbers to Iona Abbey over summer 2013 (34,957 visitors from May to August) but no more up to date annual figures were available.

4.6 RSPB Report on economic impact of white-tailed eagles to the Isle of Mull

The RSPB's Wildlife at Work report (Molloy, 2011) highlights the natural environment as featuring prominently in decision to visit Mull, in particular landscape and scenery, cited by 79% of survey respondents. Visitors travelled an average of 400km (250 miles) and some as far as 1000km (600 miles) to visit Mull.

4.7 Sea eagle viewing hide visitor numbers

Given the shortage of other data on visitor numbers, SNH suggested that visitor numbers to the sea eagle viewing hide might provide a point of reference or some indication of trends in visitor numbers. Annual figures provided by the rangers are summarised below.

Table 3. Sea eagle viewing hide visitor numbers 2000-2012

| Year | Total visitor nos. | Comments |
|------|--------------------|----------|
| 2000 | 1210 | |
| 2001 | 857 | |
| 2002 | 1445 | |
| 2003 | 1149 | |

| | | |
|------|------|--|
| 2004 | 2609 | |
| 2005 | 3328 | |
| 2006 | 5500 | |
| 2007 | 3158 | |
| 2008 | 4057 | |
| 2009 | 5403 | + further 500 visitors Oct-Mar |
| 2010 | 3378 | |
| 2011 | 4324 | 2 sites, including drop-in walkers and cyclists as well as booked visits |
| 2012 | 2784 | One hide only, limited to 20/visit, no drop in visits |

Review of the sea eagle viewing hide reports suggests that many factors influenced recorded hide visitor numbers, including nest failure or practical monitoring difficulties, hence trends in visitor numbers to the hides are not necessarily representative of overall visitor trends on Mull, nor – in the absence of any baseline data on visitor numbers to Mull - is there any way of telling what proportion of visitors to Mull visit the hide. Whilst it seems not unreasonable to assume that those visiting the hide(s) have some environmental interest and might potentially be interested in walking or cycling an LDR across Mull, without any further indication of visitor profile, there is no way of accurately estimating what proportion of hide visitors might actually use the route.

4.8 Holiday Mull

As the destination marketing organisation for Mull, and with their website the default during Google searches for accommodation or holiday information on Mull, it was suggested that Holiday Mull be approached to see what data they might be able to provide of relevance to the Mull LDR socio-economic study. Holiday Mull does not collate data on visitor numbers, but offered the following information on web site hits for the past 12 months.

Table 4. Accommodation enquiries logged on Holiday Mull website

| Type of accommodation | No. web hits |
|-----------------------|--------------|
| B&B | 29,476 |
| Guest house | 5,189 |
| Hotel | 16,186 |
| Hostel | 1,361 |
| Self-catering | 108,607 |
| Camping | 5,580 |

Although recorded web hits imply that enquirers have subsequently clicked through to a member's web site, the figures are not necessarily unique in that a single visitor looking at three different types of accommodation would be recorded under each category. Whilst providing an indication of the comparative levels of interest in different types of accommodation, the fact that no log is kept of subsequent bookings, and that there are numerous other websites detailing accommodation on Mull, the figures above cannot provide any indication of absolute visitor numbers.

4.9 Tourism in Western Scotland 2011

Combined statistics for Argyll, Loch Lomond, Stirling and the Forth Valley (Visit Scotland, 2011) provide some basic information about origin and purpose of visits. For the aggregated region, average trip duration was 4.1 days for GB tourists and 4 days for overseas tourists,

compared with 3.4 days and 7.5 days respectively for Scotland overall. Of total 1.48 million GB visitors to the region, 38% came from England, 61% from Scotland and 2% from Wales. Of these GB visitors, 79% were on holiday, 22% visiting friends and relatives, compared with figures of 67% and 13% respectively for Scotland overall. Amongst overseas visitors, USA (15%), Germany (13%) and France (10%) were the three most common countries of residence.

In terms of accommodation used by visitors across the aggregated region, 24% of GB visitors stayed in hotels or guest houses, 24% with friends and relatives, 3% in B&Bs, 21% self-catering, 16% caravan or camping and 12% elsewhere.

5. PROJECTED USE OF PROPOSED MULL LDR

The number of factors which can influence the appeal and use of LDRs, clearly makes it difficult to accurately predict future route usage, particularly without knowing where the route will go and its consequent characteristics. The confidence with which usage projections can be produced is further compounded by the lack of baseline data revealed by the project, including:

- lack of accurate baseline data on visitor numbers to Mull;
- lack of any statistically valid hard data on existing cycling tourism on Mull, including number of visiting cyclists, length of stay, favoured routes, interests, accommodation preferences;
- lack of statistical information on interest in the proposed LDR amongst visitors for walking or cycling use;
- lack of quantifiable information on level of local community interest in using the proposed route.

As a result, various methods have been adopted to generate predictions of future route usage and economic benefits, each with its own caveats.

5.1 Extension of the approach adopted by Oban to Tyndrum Study

In 2012 SNH commissioned a report investigating the potential benefits of a multi-use path between Oban and Tyndrum. Between 69 and 76km (43 and 47 miles) long, the route would have various parallels with the proposed Mull LDR. The report (EKOS and Tourism Resources Company, 2012) estimated that the route would attract approximately 32,000 visitors per annum, of which 81% would be day visitors and 19% overnight visitors, with 3,000 anticipated undertaking the full route. The net additional economic impact that this would generate (after deducting deadweight, substitution, displacement and leakage effects and adding multiplier effects) has been estimated at £1m for the region and an additional £0.4m for Scotland.

The project brief included specific requirement to review this study. Calculations applying the same methodology to the proposed Mull LDR are detailed in Annex 1. The resultant figures are:

| | |
|--|------------------|
| Estimated total no. local users and day visitors | 3,272 per annum. |
| of whom 72% would walk 3-13km (2-8 miles) or cycle 3-16km (2-10 miles) | |
| Estimated total no. overnight tourists using the route | |
| 4,870 (low scenario) to 7,527 (high scenario), assume average of 6,000 users | |
| Estimated total no. users | 9,272 per annum |
| (estimated total no. local users and day visitors | |
| + estimated total no. overnight visitors) | |
| Of which estimated total no. walkers | 8,690 |
| Estimated total no. cyclists | 584 |
| Estimated no. of overnight users completing route | |
| as one trip, based on 50% of overnight visitors, | |
| using mean between low and high scenarios | 3,000 |

No criticism of the Tyndrum to Oban Study is implied or intended, but numerous issues have been identified in applying the same methodology to the proposed Mull LDR, namely:

- The Tyndrum to Oban study anticipates high levels of local use, drawing heavily on statistics for forest attractions (58% of visitors travelling <10km (6 miles), 77% <24km (15 miles) and 82% day visitors) and assumptions on routes such as the Cleveland and Pennine Ways, for which the study deduced 80-90% of users are local residents

on short walks using part of the route close to towns, villages and easy access points. In reality the proportionate split between levels of local and visiting use are very much related to the location of the route, proximity and ease of access to centres of population, character and marketing of the route. The Kintyre Way estimates that probably 90% of all use is by visitors, which taking account of the relatively small local resident population, the visitor appeal of Mull, and length of the proposed route is a much more realistic proportion for the proposed Mull LDR.

- The Tyndrum to Oban Study calculations were based on a very low proportion of full-length route usage, based on 1.5% of users walking the whole of the Pennine Way, and only 10% of users walking the whole of Hadrian's Wall Path or Cotswold's Way in one trip. Again, the number of end-to-end users varies considerably between routes. The C2C cycle route, for example, inspires very high levels of end to end cyclists, with only 5% of day cyclists (Weston, Davies, Lumsdon and McGrath, 2012) with 10-15,000 people cycling the entire length of the route each year. Walking routes such as St. Cuthbert's Way which can be completed in 4-5 days similarly attract high end-to-end usage. The short length of the proposed LDR, time and cost of getting to Mull and intrinsic appeal of the route are likely to attract far higher levels of end to end use than those used in forecasts for the Tyndrum to Oban study.
- Usage figures relied heavily on the results of the Scottish Recreation Survey (TNS Research International, 2012), which is very useful in the data it provides on general outdoor recreation, but not necessarily relevant to LDR usage, particularly by visitors. 95% of the outdoor visits covered by this survey were made from home on a day out rather than when staying away from home, and 67% of all visits covered by the survey involved walking from home with an average of only 14.5km (9 miles) to and from the main destination. No statistics are available as to the relevance of Scottish Recreation Survey data to even local usage of the proposed route on Mull.
- The Scottish Recreation Survey is also very heavily skewed towards walkers rather than cyclists, cycling accounting for only 5-6% of all visits included in the survey, whereas Sustrans monitoring (see below) confirms that multi-use routes such as the Oban to Fort William path more typically attract >50% cycle use. Other cycle routes such as the C2C attract a far higher percentage of cycle use.
- No figures are available to indicate the significance of added cost of ferry connection between Mull and the mainland or relevance of drive times to route usage calculations. Realistically, it is hard to imagine residents of Iona coming across on the ferry specifically to use short lengths of the LDR, even though in geographic terms they live within a relatively short distance of the route. Likewise many of the residents of other Argyll islands.
- Although the two routes share some characteristics, many of the factors which influence economic impact are different. The proposed Oban to Tyndrum route was identified as being well served in terms of road/rail connectivity and already being well served in terms of accommodation, retail, cafe, hotels, bars and other outlets which would support and potentially benefit from route development, which is not true of the proposed Mull LDR.
- The proposed Mull LDR is arguably potentially of far greater appeal to UK and overseas visitors as a pilgrimage route than the Oban to Tyndrum route.

On balance, although the methodology for the Oban to Tyndrum study is clearly documented, the resultant figures do not necessarily bear any relation to actual usage figures from other LDRs, and as such the level of confidence in figures produced by application of the same methodology to the proposed Mull LDR is very low.

5.2 Comparing proposed route with use of other LDRs and SGTs

As noted in the John Muir Coast to Coast Trail Economic Benefit Study (Glamis Consultancy and Campbell Macrae Associates, 2012), figures for usage of other LDRs and SGTs are

surprisingly difficult to obtain. Few LDRs or SGTs have an effective monitoring strategy in place, and many of those which have attempted to install counters have struggled with mechanical failure, problems with data download or difficulty analysing data output to produce any meaningful figures. Even those LDRs able to put a figure on total footfall as recorded by one or more counters installed at specific locations cannot then differentiate between end to end users as opposed to those using individual sections, or between use by visitors staying overnight and local use. (Note that far more accurate figures are available for some cycling routes and sections of the National Cycle Network – see 5.3 below). The table below collates the information gathered from response to request to all LDR managers in Scotland, with comments regarding interpretation of the data for each route in relation to the proposed Mull LDR.

At first sight, the most relevant LDRs to the proposed Mull route are the Kintyre Way (sparse local population and consequently low levels of local use, comparative remoteness to population centres), the West Island Way (relatively short, good scenic variation) and St. Cuthbert's Way (pilgrimage route), but each of these routes has some very significant differences to the proposed Mull LDR, and some shortcomings in meeting the pre-identified list of users' needs.

5.2.1 Variation over time

The pattern and level of use of LDRs after initial launch varies between routes. Some which have attracted particularly high media profile leading up to and surrounding the launch, such as Hadrian's Wall Path, attract very high levels of use in the first year which may then tail off in the following few years before steadily rising again. However the majority of routes report a common pattern with level of use increasing steadily from route opening, with subsequent fluctuations mainly due to weather (sometimes in the previous year encouraging people to book foreign holidays the following year), national economy or specific problems on the route such as sections being closed. Usage of less popular routes which do not match route users' needs and interests, for example because of their length or high proportion on road, tends to remain relatively static.

5.2.2 Seasonality

Insufficient data is available to accurately plot on a monthly basis use of LDRs in Scotland, but route managers confirm that use of most LDRs around Britain is concentrated between April and October. South of the border, some routes, such as Hadrian's Wall Path, actively discourage use during winter months by discontinuing their passport scheme. This is to minimise impact and maintenance requirement during the wettest months and so try and protect the sustainability of the route. Taking account of factors such as weather, day length, less reliability in ferry crossings, realistically a long distance route across Mull is unlikely to attract much use by visitors outwith the main tourist season.

However, one of the potential benefits of the proposed LDR is scope to attract additional visitors outwith the peak tourism times on Mull, for example between the end of the Easter school holidays and Whitsun holidays in late June, and after English schools go back in early September. Analysis of seasonal fluctuations in end to end usage of Hadrian's Wall path does not mirror the Scottish tourism national profile, as graphically depicted in the John Muir Coast to Coastal Trail Economic Benefit Study. Although not statistically proven, the seasonal trends in use of the Hadrian's Wall path are reflected on many other LDRs around Scotland, rising rapidly to a peak by early May and then remaining at that high level until September.

Table 5. Approximate number of individuals using specific long distance routes in 2012, based on figures supplied by route managers.

| Route | Length km (miles) | Estimated total user nos. | %day | % multi- day | % full length | Estimated full length user nos. | Notes re. estimated user numbers and comments in interpreting figures in relation to Mull LDR |
|------------------------------|-------------------------|---------------------------------|------|--------------------|---------------------|---------------------------------------|---|
| Annandale Way | 88.5 (55) | Unknown | | | | | No accurate figures re. user nos. but route development has attracted very high levels of regular local use and inspired many local people to walk full length of route in sections. Visitor use both in sections and full-length. Variety of scenery and character of path much appreciated by route users. |
| Ayrshire Coastal Path | 146 (91) | 3,000 | 84% | 16% | 1-2% | | Developed by Rotarians, now promoted as part of Appalachian trail, but not necessarily proper path all the way. Some stretches along beach, including sections which revert to road at high tide. Coastal location and ease of access encourage use, particularly sectional. |
| Berwickshire Coastal Path | 48 (30) | | | | | 1,852 | Relatively newly developed coastal footpath, varied scenery, effective link between other LDRs, attracted relatively high use soon after launch. |
| Borders Abbeys Way | 105 (65) | 15,000 | | | | 2,380 | Circular walking route around Borders Abbeys which includes many sections of core path with high level local use but also attracts visitors, including those with specific religious interest. Although lowland Borders scenery is very attractive, some walkers comment that it lacks the wow factor of other LDRs. Many people walk the path in sections over a period of time, e.g. weekends, rather than on successive days. Full-length usage figures based on remote counter but may well include |

| | | | | | | | | |
|-------------------|-----------|---------|-----|-----|-----|--------|---------------------|--|
| Cateran Trail | 105 (65) | 2,600 | | | | | | some short distance and multi-day users. Circular informal rural path around Angus developed for walkers. Est. 97% walkers, 2% cyclists, 1% horse-riders |
| Clyde Walkway | 64 (40) | 155,000 | 95% | | 5% | | | Linear predominantly walking route between Lanark and Glasgow, attracts very high level of daily local use. Often used by walkers from Lands End to John O'Groats or as part of link between other routes but otherwise fairly low on the most LDR users' hit list. |
| Dava Way | 39 (24) | 3,000 | 90% | | 5% | 400 | Combined multi-full | Linear multi-use route along disused railway from Grantown to Forres, minimal marketing, low spec, well defined so easy to follow but appreciation of surrounding countryside in parts restricted by cuttings, embankments or trees and scrub along the railway and few services and no accommodation along route which limits multi-day use. Mainly unsurfaced with original rough stone for several miles hence unsuitable for road cyclists. Surface together with stiles and difficulty finding accommodation for horse/rider or getting back to start point without retracing steps deters many horse riders. |
| Fife Coastal Path | 183 (114) | 500,000 | 72% | 26% | 7% | 35,000 | | Very clearly waymarked, well maintained route within 1 hr of 90% of Scottish population, easily accessible by public transport, promoted circular routes, all of which contribute to high profile, reputation and usage. User numbers amongst most accurate from comprehensive monitoring programme using strategically positioned counters plus user surveys. |
| Great Glen | 127 (79) | 30,000 | 75% | 10% | 15% | 4,500 | | Well established route with deservedly high |

| | | | | | | |
|---------------------|----------|---------|--------|-----|---------------------|--|
| Way | | | | | | reputation which is very effectively promoted, marketed and maintained. Clearly waymarked throughout, easy to follow, good range of accommodation and services on all but one section, although relatively high proportion on forest tracks and lack of real challenge discourages more adventurous walkers and cyclists. |
| Hadrians Wall Path | 135 (84) | 500,000 | | | 10,000 | One of the most popular LDRs in England, and in the UK, due to length, historical interest, iconic landscapes, good combination of challenge yet achievable, availability of every type of accommodation and back-up services (inc. default options for those who have had enough) and quality of basic infrastructure, all of which appeal to everyday walkers as well as serial LDR users. Many are inspired to then try other LDRs. |
| Kintyre Way | 140 (87) | | | | 1,000-2,500 | Linear route through Mull of Kintyre, attracted high profile at initial launch, majority of users walk full length (with minority cycling), very little local use due to remoteness from communities. Distance from concentrations of population, relatively high proportion of route through forestry (to ease initial route negotiation) and on road have all limited use, but location and variation in scenery attract increasing use each year. |
| Moray Coastal Trail | 72 (45) | | 22,000 | | 1,000 | Linear coastal path, mainly level, easy walking |
| River Ayr Way | 64 (40) | 137,000 | 70% | 30% | Combined multi-full | High levels of use by locals and visitors have proved wrong initial reservations about the popularity of a route through Ayrshire's mining country. Creation of riverside LDR has inspired many local people to walk regularly, |

| | | | | | | | |
|----------------------|-----------|---------|-----|-----|-----|--------|---|
| Rob Roy Way | 129 (80) | 3,000 | 60% | 25% | 15% | 450 | and provided goal to aspire to Linear route focusing on places of relevance to Rob Roy. Historical interest, varied and fantastic scenery, close proximity and ease of access to high population centres all attract use, but in past lack of waymarking and low investment in physical infrastructure marred reputation and deterred some users. Popularity increasing with physical improvement in route, potential for far higher profile with increased marketing. |
| Southern Uplands Way | 338 (210) | 80,000 | 83% | 12% | 5% | 1,000 | Most attractive and accessible sections well used but use of overall route limited by length, (average 11-15 days to complete), remoteness, lack of services and accommodation |
| Speyside Way | 106 (66) | 52,750 | | | | 2,750 | 73% walkers, 25% cyclists, 2% horse-riders Iconic route along one of Scotland's greatest rivers, through whisky country, high proportion on disused railway |
| St. Cuthbert's Way | 100 (62) | | | | | 2,579 | 4-5 day pilgrimage route, iconic finish on Holy Island, ticks nearly all boxes of what walkers are looking for other than limited accommodation on some stages and limited public transport access. |
| Three Lochs Way | 53 (33) | | 70% | 10% | 20% | 300 | 95% walkers, 5% cyclists. |
| West Highland Way | 155 (96) | 120,000 | 45% | 10% | 45% | 36,000 | UK's best known and most popular LDRs in terms of full length use, inspires and attracts people of all ages and abilities, including many with no previous LDR experience, plus endless events and challenges. |
| West Island Way | 48 (30) | 6-7,000 | | | | | Majority use 80% of route, no accurate figures for full-length usage |

5.3 Oban to Fort William Route

In order to support and substantiate the value of its work, Sustrans' Research and Monitoring Unit has pioneered the development of monitoring and evaluation of sustainable travel interventions through effective, valid and rigorous monitoring regimes. Surveys of individual routes follow a standardised route user survey which is replicable and comparable between many routes. Route user intercept survey (Sustrans, 2012a) undertaken over four days (4x 12 hour survey periods: school holiday weekday, school holiday weekend day, term-time weekday, term time weekend) at Ballachulish produced the following route usage statistics:

Table 6. Sustrans route user intercept survey results for cycle route at Ballachulish.

| | Survey Year | |
|--|--------------------------------|---|
| | 2008 | 2011 |
| Total no route users | 207 with 39 people interviewed | 258 with 42 people interviewed |
| Estimated annual usage | 13,992 | 17,576 |
| Of which cyclists | 7,202 | 6,992 |
| pedestrians | 6,610 | 10,366 |
| other users | 180 | 218 |
| Purpose of trip | | |
| Leisure | 95.8% | 72.5% |
| Commuting | | 2.8% |
| Other | 4.2% | 24.7% |
| Start point for trip on day of interview | | Home 50.7% Holiday base > 1 night 44.6% Holiday base 1 night 4.7% |
| Description of trip | | 68% short, circular recreational trip 16.3% short, out and back, recreational trip 8.2% day ride/walk 2.7% short break 3.8% touring holiday 1.1% dog walking |
| % cyclists who are recreational users | 90.9% | 92.8% |
| % recreational cyclists who are tourists | 27.4% | 44.4% |
| User age profile | | 4.7% |
| 16-24 years | 19.4% | 12.0% |
| 25-34 years | 23.7% | 14.9% |
| 45-59 years | 46.7% | 33.3% 45-54 |
| 60+ years | 10.2% | 20.6% 55-64 14.4% 65 years + |

Similar intercept surveys carried out at a variety of other locations along the Oban to Fort William route between 2003 and 2011 confirm that use of the route is steadily increasing, the majority of trips are for leisure but commuting trips are also rising, the route is giving people an added opportunity to improve their health and wellbeing, and the route is generating significant income for the local area (Sustrans, 2012b).

Factors to take into account when comparing the Oban to Fort William route with the proposed Mull LDR:

- Oban to Fort William is a key link in many touring cycle journeys around the west of Scotland and one would therefore expect to attract a higher level of visiting recreational cycling use, although relatively few cyclists are likely to visit the region purely to cycle this route, whereas the Mull route would establish an attraction in its own right.
- Local use of the Oban to Fort William route for both commuting and recreational purposes is likely to be higher than that on Mull because of higher local population density.
- Some sections of the Oban to Fort William route, particularly those near concentrations of population such as at Ganavan, attract high levels of local dog walking use.

5.4 Hebridean Way Impact Assessment

The Hebridean Way, currently under development, will create independent waymarked walking and cycling routes through the Outer Hebrides from Vatersay to the Butt of Lewis. Based on statistical analysis of data from cycling routes such as the C2C and others included in the European Cycle Route Network Eurovelo Study (Weston, Davies, Lumsdon and McGrath, 2012), and using a baseline figure of approximately 1,000 visiting cyclists per annum already travelling the length of the Outer Hebrides, recent impact assessment (Westbrook and Duncan Bryden Associates, 2013) estimated that by year three, the 270 km cycle route might attract an additional 2,000 cyclists, each staying an average of 7 nights with an average spend of £53/day, generating additional expenditure of approximately £742,000. In addition, the report suggested that a further 15% of the 110,000 people visiting the Outer Hebrides for the first time each year, and a proportion of the 10,000 repeat visitors, might also be attracted to cycle the route, generating an additional 18,000 cycling visitors, for whom perhaps 10% of their expenditure might be attributed to the Hebridean Way, generating a further £667,800 additional expenditure (18,000 visitors x 10% x £53/day x 7 days).

Drawing on experience of other routes, in particular the Kintyre Way, the study suggested that by year three perhaps 500 people might be expected to walk the entire 326 km route from Vatersay to the Butt, spending an average of £40 per day or £560 each over 14 nights, generating total spend of approximately £265,000, with scope for modest growth in subsequent years. Assuming 5% of the expenditure of the 50% of 140,000 Outer Hebrides visitors who claim they will walk during their visit, visitors walking part of the route would generate an additional £1,102,500 per annum (based on £45 spend per day x 7 days x 70,000 visitors x 5%).

Although the Outer Hebrides is already comparatively well established as an “end to end” cycle tourism destination, it can be argued that the proposed Mull LDR could potentially attract significantly higher user numbers on the basis that it has the added appeal of a pilgrimage route, is clearly much shorter and more readily accessible than the Hebridean Way(s), requiring less of a commitment in time and money for short or full distance users, realistically achievable within a short break.

5.5 Pilgrimage routes

Perhaps the best known pilgrimage route, and certainly the one attracting highest levels of use, is the Camino de Santiago. There are numerous other pilgrimage routes across Spain, including for example the Via de la Plata from Seville to Santiago. In 1992 approximately 50 people walked the Via de la Plata. The number doubled the following year because 1993 was a holy year when St. James Day falls on a Sunday – but still this amounted to only 100 people walking the Via de la Plata in comparison to 99,000 walking the Camino de Santiago the same year. By 2004, nearly 10,000 people were walking the Via de la Plata (in

comparison with nearly 140,000 walking the Camino de Santiago in the same year). Establishment of regularly spaced refuges has been highly influential in attracting further use of the routes – not least by many Spanish people who walk the last few sections of both routes as a cheap holiday option.

A far less well known (and less successful in terms of visitor numbers) national pilgrimage route promoted for walkers, cyclists and horse-riders has been developed through Denmark, running down the spine of Denmark from Jutland south to Schleswig Holstein along the original main road which over the centuries has been used as a pilgrimage route, drove road and for transport of the King's troops. Although rich in history, even after signage and promotion the route attracted only 250 walkers p.a. Inspired by the increasing number of visitors which the Camino de Santiago was attracting each year, the Danish Tourist agency arranged study visits to Spain, which have significantly influenced recent development of Haervejen, focusing on establishment of hostels and other cheap accommodation. At key locations along the route farm buildings have been converted into hostels, which are still owned by the farmer but funding has been made conditional on 10 year commitment to accommodation provision. In many areas local priests have been responsible for co-ordinating accommodation.

Important lessons can be learned from the Danish experience in relation to route development on Mull. Assumption that provision of free or cheap accommodation along the route is the key to increasing number of walkers to an ambitious target of 250,000 p.a. (i.e. in line with the busiest sections of the Camino de Santiago) ignores the fundamental criteria essential to the success of any long distance route. Although the route is easy going because it is relatively level throughout, and is suitable for all ages and abilities with great potential for multi-use, it is very "samey", without much contrast in scenery, landscape, topography or culture. In particular the high proportion of route on tarmac is off-putting to walkers, and there is a lack of joined up thinking about route development and promotion. Budget hostel type accommodation targeted at pilgrims does not necessarily match the needs of or appeal to other walkers and cyclists. The weather is also very different to Spain, there is markedly less religious fervour in Denmark than Spain, and despite its long history of use, Haervejen lacks the cult following which the Camino de Santiago has accrued way beyond religious interest. Some attempts have been made at involving private companies in further route development and promotion of linked services, e.g. baggage transfer, but so far this aspect has been relatively undeveloped. Until the number of visitors using the route increases, it is difficult to generate interest from private investors or to encourage local business development. Most accommodation is only available during the peak summer months, but without increased user numbers on the route, it is hard to persuade accommodation providers to extend their season.

5.6 Review of estimated use of Mull LDR

Following the same methodology as used in the Tyndrum to Oban route study, the estimated total number of users for the Mull LDR would be 9,274. In comparison to other routes, this total estimated route user figure seems low taking account of the potential to attract part distance visiting walkers or cyclists. The total estimate of 3,000 full-length users may appear ambitious when compared with lower figures for the long established St. Cuthbert's Way or Speyside Way, but taking account of its unique selling points, the Mull LDR offers potential to attract significantly higher use. Some of the many other factors which need to be taken into account as well as statistical modelling are summarised below:

5.6.1 Factors likely to positively influence usage of Mull LDR

- ✓ Length of route achievable within short break, or in sections
- ✓ Added appeal of island

- ✓ Numerous historic sites and features of interest
- ✓ Stunning and very varied scenery
- ✓ Great variety in terrain
- ✓ Significant wildlife and geological interest
- ✓ High level of walking interest amongst existing visitors to Mull
- ✓ Potential to include coastal sections
- ✓ Sense of wilderness without ever being too far from civilisation
- ✓ Public transport readily available to Oban
- ✓ Pilgrimage interest
- ✓ High visitor levels to Iona (CalMac recorded approximately 221k passengers 2012) with potential to raise route profile
- ✓ Apart from Iona, landscape, scenery and wildlife are the main reasons why visitors came to Mull. The proposed LDR would provide opportunity to enjoy all of these.

5.6.2 Factors likely to negatively influence route usage

- Time and cost of getting to Mull
- Shortcomings in public transport to access sections of route
- Low population density within easy reach of route
- Lack of accommodation, particularly through Glen More
- Section length too long through Glen More
- Lack of services, particularly through Glen More
- Combined walking/cycling route – in trying to be all things to all users, a multi-use route risks failing to meet the real needs of any user
- Current lack of actively promoted baggage transfer services

The lack of accurate baseline data makes it virtually impossible to produce robust forecasts. Working from CalMac carrying statistics and the Holiday Mull and Iona 2011 Visitor Survey might suggest the following anticipated user numbers:

| | |
|---|---------|
| 2012 annual passenger carrying nos. Mull-mainland | 694,253 |
| 50% reduction assuming all crossings are return | 347,126 |

The proportion of local/business use will significantly influence the accuracy with which visitor numbers can be derived from these passenger carryings, as indicated in the table below. Applying similar methodology as the Hebridean Way Study, visitor numbers can then be multiplied by the proportion of visitors in the 2011 Holiday Mull and Iona Visitor Survey who confirmed that they had walked whilst on Mull.

Table 7. Estimated potential use of proposed Mull LDR using Hebridean Way methodology

| Examples of proportionate reduction in total ferry passenger numbers for local/business use | Estimated visitor nos. 2012 | Multiplied by 78% for proportion walking on Mull | Say 10% of whom might be interested in using the proposed LDR(s) in whole or part |
|---|-----------------------------|--|---|
| Allowing for 30% | 242,988 | 189,530 | 18,953 |
| Allowing for 50% | 173,563 | 135,379 | 13,537 |

While these figures are clearly very significantly higher than those suggested by application of the Tyndrum to Oban Study methodology, and reliability of projections is seriously undermined by lack of robust baseline data, in comparison to other routes, the overall user numbers appear not unreasonable. Amalgamating these figures with experience on other

routes, and all of the other information collated in the course of the study, the figures below are the “best guess” which can be suggested at present for future use of the proposed Mull LDR by walkers and cyclists.

Table 8. Estimated user numbers for proposed LDR

| Category of user | Estimated no. route users | | | |
|---|---------------------------|--------|--------|--------|
| | Year 1 | Year 2 | Year 3 | Year 4 |
| Total no. visiting short or part-distance walkers | 5,000 | 7,500 | 10,000 | 15,000 |
| Total no. full-length route walkers | 1,500 | 2,000 | 2,500 | 3,000 |
| Total no. cyclists | 500 | 750 | 1,000 | 1,500 |

The figures assume that appropriate accommodation and services are available on route, that route alignment and quality of infrastructure reflect user needs and expectations and that the route is appropriately marketed. Route development with a high proportion alongside the road i.e. adopting the Glen More route for walkers, is unlikely to attract even a fraction of these figures.

6. ACCOMMODATION AND SERVICES

Existing accommodation and services have been identified by a combination of internet search, desk based research, face to face and telephone consultation. A comprehensive survey of existing local businesses is beyond the scope of the study, but whilst on Mull, opportunity was taken to consult informally with various types of business to explore current and recent visitor trends and profiles (both in relation to their own business and in the community more generally), scope for and limitations on tourism and enterprise development linked to development of a long distance cycling and/or walking route, and perceived demand from visitors or local people.

6.1 Existing serviced accommodation

Although most LDR users are on a budget, times have changed since the days when most carried a tent on their back or stayed in bothies. Some still choose to camp, but the majority of LDR users nowadays prefer to stay in serviced accommodation. Good quality hostels with cooking facilities and optional meals or somewhere nearby to eat out are also popular. The ideal is for the full range of accommodation to be available, or for route users to have the choice of a bed in a bunkhouse or a plush hotel room at the same venue.

Most LDR users want, and expect to find, accommodation either directly on or very close to the route, say within 800m for walkers and 3-5km maximum for cyclists. Analysis of accommodation in relation to the proposed route is somewhat difficult in advance of a firm decision on route alignment, although it is appreciated that the potential supply of appropriately spaced accommodation may be a crucial factor in deciding on the best route. A total of 142 serviced beds have been identified directly on or close to the route, with an additional 83 beds at the Isle of Mull Hotel one mile north of Craignure, and a further four serviced beds if the route goes via Lochbuie (229 in total).

Table 9. Accommodation on or close to the proposed Mull LDR

| Location | Establishment | Bed nos. |
|------------|----------------------|----------|
| Craignure | Isle of Mull Hotel | 83 |
| | Craignure Inn | 7 |
| | Dee-Emm, Druim Mhor | 2 |
| Craignure | Linnhe View | 5 |
| | Shieling Holidays | Campsite |
| Lochdon | High Oatfield | 4 |
| | Old Mill Guest House | 6 |
| | Wild Cottage | 2 |
| Lochbuie | Barrachandroman | 4 |
| Pennyghael | Craigrowan | 6 |
| | Pennyghael Hotel | 12 |
| | School House | 4 |
| | Smithy House | 4 |

| | | |
|--------------|---------------|------------------------|
| Bunessan | An Caladh | 4 |
| | Ardness House | 6 |
| | Argyll Arms | 18 |
| | Dunan | 4 |
| | Lee Croft | 2 |
| | Newcrofts | 5 |
| | Oran Na Mara | 6 |
| | Fionnphort | Achaban |
| Caol Ithe | | 8 |
| Creich Hall | | 16 (groups, bunkhouse) |
| Fidden | | Campsite |
| Maolbhuidhe | | 5 |
| Seaview | | 10 |
| Staffa House | | 10 |

6.2 Non-serviced accommodation

Self-catering accommodation may well be relevant to people wishing to use the route for day visits, but on many routes is generally relatively unpopular with LDR users because of the logistical complications of getting to and from the start/finish of each daily section. This may be less of an issue on Mull given the relatively short length of the proposed route, particularly if transport is available in the form of either readily available taxi service or a sufficiently regular and reliable public bus service connecting with key points on the route, as developed to good effect on the Pembrokeshire Coast Path.

Given the number of self-catering units already available on Mull, and the fact that self-catering accommodation is unlikely to limit route development or use, self-catering accommodation has not been reviewed as part of this study.

The two campsites within the route corridor at Craignure and Fidden are included in the list above. Grass Point is also a popular wild campsite.

6.3 Occupancy rates for existing accommodation

VisitScotland's July 2013 statistics (Visit Scotland, 2013) cite current annual occupancy rates for all accommodation in Scotland as ranging from 27% for self-catering units to 59% for hotel rooms, and 30% for B&Bs, guest houses, bunk houses and bothies. No figures are available from VisitScotland or other sources for Argyll and Bute as a region, nor more local to Mull. None of the accommodation businesses consulted maintain records of occupancy rates. Most of those consulted suggested that telephone or email request to other accommodation providers about occupancy rates was likely to be unproductive.

Verbal consultation with accommodation providers on Mull in the course of the study suggests that accommodation providers in Fionnphort and on Iona are often full to capacity during the main tourism season, when there is a shortage of beds in these locations, but those in Bunessan, Pennyghael and further east on the proposed route would welcome more business. The Pennyghael Hotel, for example, had only 35 bookings in total for its three self-catering cottages during the 27 week season from Easter to October in 2012, which although at 25.9% occupancy is only slightly below the national average, is insufficient to keep a business going. The Argyll Arms is another example. Having been up for sale for some time, in the absence of a buyer the hotel is now looking at other ways to stimulate business after declining demand for accommodation and refreshments over the last few

years. They have had very few cyclists staying or eating with them in the past, but are keen to attract any additional business in future. Due to declining B&B bookings and increased cafe demand, in 2013 Smithy House at Pennyghael converted one of its serviced bedrooms into additional cafe space.

6.4 Gaps in existing accommodation

Accommodation is the main income generator along long distance routes. Insufficient provision will negatively affect route usage, and will limit economic benefits. Crude analysis of capacity of existing accommodation to satisfy demand from likely number of users throughout the season can be calculated by assuming 30% occupancy prior to route development in B&Bs and 59% for hotel rooms x number of existing beds (assuming walking route goes via Lochbuie) x 200 day season (Easter to October), giving a total of 25,990 available bed nights. Assuming average four night stay per walker, this would equate to 6,497 full length route walkers, which exceeds the forecast average but does not allow for cycling use, or the fact that accommodation in Fionnphort is already full to capacity for at least part of the current season. Overall, the current supply of accommodation is inadequate to support the potential levels of use of the proposed LDR to generate maximum economic benefit.

Analysis to identify more specific gaps in existing accommodation must take into account:

- Range of accommodation available and how this relates to user needs:
- Location of accommodation in relation to likely stages along the route. This will depend on which direction people are travelling, and the time they arrive on a ferry at either Craignure or Fionnphort, which will in turn depend on how far they have travelled to get to their start point. Those travelling from Oban or Iona on an evening ferry would be looking for accommodation close to the ferryport, whereas those arriving on a morning ferry are likely to walk or cycle a full section before needing accommodation.

The main shortfalls in existing accommodation which consequently offer potential for business development are:

- Overall shortage of serviced accommodation directly on or within easy access of the route, particularly around Lochdon and Strathcoil, but also potentially in Fionnphort given that most accommodation tends to be fully booked there during summer months.
- Depending on level of route usage, potential shortage of accommodation around Pennyghael, and between Bunessan and Pennyghael.
- No accommodation at all through Glen More.
- Lack of bunkhouse or hostel accommodation anywhere on or near the route, other than hall offering accommodation for groups near Fionnphort.
- If a coastal route is developed, lack of accommodation at Carsaig.

6.5 Existing services relevant to the route

6.5.1 Food and refreshments

Availability of food and refreshments along the route is fine for cyclists who can expect to cover 20 miles in a couple of hours, but relatively limited for walkers for whom the same distance could take up to two days, and for whom deviation of even half a mile off route is more than most wish to make. Existing outlets identified in the course of the study are:

Craignure: Spar general shop, Arlene's coffee shop, MacGregor's roadhouse, Craignure Inn serving food all day, cafe/take-away sandwich bar.

- Lochbuie: self-serve honesty shop in the Old Post Office selling tea, coffee, cold drinks, homemade cakes and traybakes, ice cream, locally produced meat and fish and local crafts. Very popular with walkers and other tourists, many of whom visit Lochbuie specifically for the shop.
- Pennyghael: Post Office offering basic food and take-away refreshments, popular with cyclists. Many of those cycling the Mull loop, or up the west side of Mull, divert to this shop before continuing north, without necessarily going to Iona.
Smithy House cafe.
- Bunessan: Post office and Spar shop, both selling food and general goods. Bakehouse - currently attracts relatively few cyclists but believes many visitors walk whilst on Mull, albeit usually short distance. Would not turn away increased business, and interested in considering scope for developing further, although often full to capacity over lunchtime in peak season, hence main interest would be attracting walkers and cyclists outwith these times/months.
Argyll Arms – food lunchtime and evening
- Fionnphort Post office and separate shop. Restaurant. Cafe
Keel Row pub.

Most of the shops along the proposed route would welcome and reckon they could easily accommodate more business. Other businesses, such as Bunessan Bakehouse, said that they are often already full to capacity over lunchtime during the peak tourist season and might therefore struggle to accommodate walkers and cyclists, but would welcome the scope for business development outwith these peak hours.

6.5.2 *Baggage transfer*

David Greenhalsh has to date very occasionally provided baggage transfer and support services for walkers on the Stevenson Way or cyclists who preferred having their bikes transported to save cycling up hill. David is potentially interested in expanding these services on the back of route development, particularly because of the flexibility which baggage transfer allows alongside existing taxi service for school runs etc.

6.5.3 *Wildlife tours*

There are currently several independent wildlife tour operators on Mull. None saw LDR development as relevant to their business.

6.6 Scope for development of additional enterprises and services

In addition to accommodation, a new LDR across Mull offers scope for the development of the following enterprises and services:

- Cafes and other refreshment outlets along the route, particularly offering morning coffee, lunch, afternoon tea and evening meals.
- Packaged picnic delivery service.
- Walking supplies e.g. maps, map cases, clothing, midge repellent, blister treatment.
- Cycle hire.
- Cycle spares and repair.
- Baggage transfer.
- Packaged tours offering a centralised booking service including ferry crossing(s), accommodation, baggage transfer, return transport to Craignure, maps and guides.

- Cycle transport.
- Route specific merchandise e.g. t-shirts, sweatshirts, hats, completion certificates.
- Route guide production.
- Ferry service linking start and finish of route, or Oban to Fionnphort.

As recognised in the Tyndrum to Oban study, self-supporting businesses focusing specifically on only one of the above opportunities may struggle to survive if reliant solely on income generated by use of the proposed LDR, but there is ample scope for creative enterprise development, either independent of or linked to existing businesses. The self-service old post office at Lochbuie provides an excellent role model for high quality, low-key service provision which creates an attraction in its own rights, meets visitors' needs, and generates valuable local income.

6.7 Limitations on development of accommodation and services

The main limitations on development of accommodation and services are:

- Most accommodation in Fionnphort and Iona is already at full capacity during the main tourism season, hence capitalising on the potential economic benefits of the route would depend on development and promotion of new accommodation in these areas, as well as elsewhere along the route.
- There is a serious shortage of suitable buildings of any kind through Glen More which might be developed into accommodation or provide refreshments or other services on route.
- Reluctance has been identified amongst some serviced accommodation providers to accept one night bookings when this is precisely what most LDR users want.
- Suitable individuals would need to be found interested in developing new businesses at appropriate points along the route, particularly during early days of route development.
- Both VisitScotland and Argyll and Bute Council Economic Development Departments have identified various of the accommodation providers within the route corridor as having little financial or other interest in further business development, and increasing trend towards self-catering properties which suits absentee owners, fits in with some holiday-home owners, and generally is less demanding on labour than provision of catered accommodation.
- Some accommodation providers are reluctant to extend the season because they value the quiet winter months to take a holiday themselves, or to carry out necessary maintenance work. This would not be an issue given that anticipated use of the LDR would predominantly be within the current tourism season from Easter to October.

7. EVALUATION OF THE POTENTIAL ECONOMIC BENEFITS OF ROUTE DEVELOPMENT

7.1 Benefits of LDRs to the local economy

Experience elsewhere in Britain very clearly demonstrates the significant benefits to the rural economy of LDRs. The South West Coast Path generates £307 million a year for the economy of the region, supporting over 7,500 jobs (Ramblers, 2013). 73.3% of accommodation providers within one mile of the South-West Coast Path consider it to be an important selling point for their business. Elsewhere in England and Wales, over one third of accommodation providers located on or near an LDR describe the route as very important to the profitability of their business. On average, accommodation providers on or close to LDRs attribute 36% of their turnover to the route. In the South-West of England, 26.7% of all visitors come solely to walk the trail, spending £136 million a year. 40% of tourism spend in South West England is generated by day visitors attracted by the South West Coast Path. Local residents take 23 million walks along the route annually, spending £116 million.

The usage and economic impact study of the Fife Coastal Path undertaken between July 2006 and June 2007 estimated between 480,000 and 580,000 visits were made to the path over a 12 month period, generating annual net expenditure of between £24 and £29 million, supporting an estimated 900-900 FTE jobs in Fife. The accommodation sector gained around 37% of all additional expenditure, the food and drink sector 33% and the retail sector 20%.

The above two routes are perhaps best case examples, the South West Coast Path being in a very popular tourist region, and the Fife Coastal Path within easy reach of high population numbers. LDRs in more inaccessible locations, and/or less well matched to user needs and aspirations, will inevitably generate much lower economic returns, but can nevertheless be of significant economic benefit, particularly to remote rural communities where options for other development are often limited. LDRs with unique selling points, such as the added island and pilgrimage interest of the proposed Mull LDR, are likely to favour route usage and associated economic benefits.

7.2 Average spend per route user

Estimates of average spend per route user vary significantly between routes. Few actively monitor actual spend. The Fife Coastal Path Usage and Impact Study (TNS Travel and Tourism, 2007) estimated that the average spend per day for all users, including multi-day and short trip, was approximately £45 (2006 figures). Taking account of the fact that only 60% of path users spent money during their visit to the path (due to local and day trip use), average spend per path user was £26.

Average spend for users of the Great Glen Way in 2012, as indicated by the Great Glen Way annual user survey (unpublished), was £228 per person for the entire trip, which equates to approximately £45/day or £2.88/mile. Interestingly, these figures are down on previous years, the average spend/trip over the past 10 years having been £247.30. Average spend for day visitors using the route during 2012 was estimated at £15.

Survey on the Southern Upland Way in 2004 (Crichton Tourism and Research Centre, 2004) suggested average daily spend on the route was £40.74, very similar to contemporary figures on other routes e.g. £43.40/day on the West Highland Way and £41.52/day on Wainwright's Coast to Coast route. On the Southern Upland Way, 72.5% of trip spend was on accommodation and luggage transfer, with the remainder on meals, food, taxis, etc.

Economic assessment of the Wales Coastal Path (Welsh Economy Research Unit, 2012) used figures for day tripper average spend of £4.20 and average spend per night of £31.74.

Whilst acknowledging that the figures are likely to be skewed by those camping or using routes on a budget, managers of other LDRs suggest that these figures are woefully inadequate.

Daily spend figures suggested by Sustrans (Sustrans, 2012b) derived from route user survey information, were £30.07/head for tourist users staying at least one night in a holiday base, and £10.02/head for home based users.

VisitScotland's Insight report for July 2013 and latest statistics compiled from the main tourism monitor surveys managed by VisitScotland quote average spend per day visitor trip in Scotland as £36.03, 20% up on 2012 figures, and slightly higher than the UK average of £32.86. However, these figures are for day visitors generally, including entry fees to attractions, and hence are higher than might be anticipated for users of the proposed LDR.

The Economic Benefit Study for the John Muir Coast to Coast Trail (Glamis Consultancy with Campbell Macrae Associates, 2012) collated information about average visitor expenditure from a variety of information sources to produce average expenditure values of £9.54 per rural day visitor, and £35.13 per rural staying visitor.

Based on past survey adjusted for subsequent price increases, the Hadrians Wall Path route manager (personal communication) suggests that realistic figures are £8-10/day for day visitors and a minimum of £60/head overnight stay (including B&B, evening meal and pub lunch). Baggage transfer costs alone are £8/bag/day.

Evaluation of the proposed Oban to Tyndrum route (EKOS and Tourism Resources Company, 2012) used VisitScotland and Scottish Recreation Survey 2010 data to estimate average daily expenditure figures, cross-checked against data from *Investigating and Enhancing the Walking Experience in Scotland* (Progressive, 2006). The resultant figures used as the basis for economic calculation were £15 day visitor from within Argyll and Bute, £25 for day visitors originating elsewhere in Scotland, £60/day for overnight UK visitors and £70/night for overseas overnight visitors.

7.3 Length of stay and additional spend factors

Estimating length of stay and daily spend for short distance route users is arguably more complicated on Mull because of the ferry journey, which will add to journey times. Whereas on other routes spend by short distance users might be limited to lunch and possibly an evening meal, use of the Mull LDR is likely to result in more overnight stays. The Mull and Iona Visitor Survey recorded nearly half (48%) of all visitors interviewed as spending only one to three nights on Mull. It is not unreasonable to suggest that route development could inspire existing visitors to stay an extra night or two to walk or cycle part(s) of the route. Ferry fares will also add to expenditure for those who specifically visit the island to use the route.

Based on the proposed LDR taking on average three full days to walk, it is anticipated that most full-distance walkers are likely to stay an average of four nights. This figure allows for the fact that due to limitations imposed by ferry crossings, most walkers are likely to stay either the night before they set off on the route and/or the night they finish, and the fact that some walkers may take four rather than three days to complete the route. For the average touring cyclist, 40 miles is fairly easily achieved in a single day, but due to ferry crossings and need to get back to ferryports (either by returning on the same route or doing a loop around Mull), full length use of the proposed Mull LDR by most cyclists is likely to involve two overnight stays. Using a figure of two nights for cyclists also allows for those who choose to tackle the proposed route in shorter stages, and who the route inspires to do a complete circuit of Mull which is likely to involve three days cycling.

7.4 Average daily expenditure forecasts

Taking all of the above into account, the following figures are suggested for average daily expenditure:

| | |
|---|-----|
| Local users from within the route corridor | 0 |
| Visitors incorporating short sections of the route within their existing stay | £15 |
| Day visitors staying additional night to walk part of the route | £45 |
| Full-length walkers (including UK and overseas visitors) | £50 |
| Full-length cyclists | £53 |

7.5 Gross expenditure

The fundamental basis for evaluation of the potential economic benefits of route development is robust figures for anticipated route usage. As noted in chapter five, projected figures for level and type of use on the proposed Mull LDR are at best speculative. Added to this is the fact that the average daily expenditure figures are wholly dependent on the availability of appropriate accommodation and services. If there are not enough beds to accommodate the number of users, then the economic benefits will be limited. In order to satisfy the brief, the following figures have been produced in relation to estimated gross expenditure, but a strong health warning is required in use of these figures taking account of the aforementioned caveats on the reliability of this information.

Table 10. Estimated direct expenditure (based on forecast walking route use after 4 years).

| Category of route user | % of total users | Estimated total no. route users/category (based on estimated use after 3 years) | Average daily spend | Total estimated annual direct spend per category of user |
|---|------------------|---|---------------------|--|
| Visitors incorporating short sections of the route within their existing stay | 50% | 5,000 | £15 | £75,000 |
| Day visitors staying additional night to walk part of the route | 50% | 5,000 | £45 | £225,000 |
| Full-length walkers (inc. UK and overseas visitors) | 100% | 2,500 | £50 x 4 days | £500,000 |
| Full-length cyclists | | 1,000 | £53 x 2 days | £106,000 |
| Total estimated direct spend | | | | £906,000 |

7.5.1 Displacement

The proposed LDR offers an entirely different experience, type and length of route to other LDRs, in particular its short length, attraction of Iona and the Scottish Highlands and Islands.

As such, dedicated LDR users are likely to use the route as well as rather than instead of other LDRs. The Mull LDR may inspire some users to then use other LDRs. Given the shortage of other waymarked walking opportunities or promoted cycling opportunities on Mull, it is assumed that route development will compliment rather than deter or deflect route users from pursuing similar activities elsewhere on the island.

7.5.2 Spatial distribution of projected expenditure

In the absence of any figures on spatial distribution of tourism spend specific to Mull, the same proportional split as used in the Tyndrum to Oban study has been adopted.

Table 11. Spatial distribution of estimated gross expenditure.

| | % total estimated direct spend | Estimated annual spend |
|-----------------|--------------------------------|------------------------|
| Local to Mull | 46% | £416,760 |
| Argyll and Bute | 40.4% | £366,024 |
| Scotland | 13.6% | £123,216 |

The communities which will benefit most are those directly on route, i.e. Craginure, Loch Don, Pennyghael, Bunessan, Fionnphort and Iona. At this stage it is not considered possible to provide meaningful splits in projected expenditure between communities, not least because location of accommodation and service developed in association with the route will significantly influence distribution of spend.

7.6 Multiplier

The figures above relate to direct expenditure as a result of route development, i.e. direct spend by route users in connection with the proposed LDR. This direct expenditure will also have knock-on effects, namely:

Induced effect whereby a proportion of increased income is respent on final goods and services produced within the local economy.

Indirect or income effect in the form of increased employment or increases in income for those already employed as a result of direct expenditure. A proportion of these increased incomes will be re-spent in the local economy.

These two effects are quantified by multiplier figures. The Scottish Tourism Multiplier Study figures relevant to route development (as used in the Tyndrum to Oban study) are 1.16 for the local area, 1.32 for Argyll and Bute and 1.57 for Scotland overall.

7.7 Net additional expenditure

Applying the above multiplier figures to the net direct expenditure calculated above gives the following figures:

Table 12. Estimated net additional expenditure for the proposed LDR

| | Local area | Argyll and Bute | Scotland | Total |
|----------------------------------|------------|-----------------|----------|----------|
| Estimated net direct expenditure | £416,760 | £366,024 | £123,216 | £906,000 |

| | | | | |
|--------------------------------------|----------|----------|----------|------------|
| Multiplier | 1.16 | 1.32 | 1.57 | |
| Estimated net additional expenditure | £483,442 | £483,152 | £193,449 | £1,160,043 |

Application of the Type II multiplier of 1.67, as used in the John Muir Coast to Coast Trail Economic Impact Study, would increase total estimated net expenditure to £1,513,020.

7.8 Gross value added (GVA)

GVA is the profit, wages and salaries generated by businesses in producing and selling products and services to visitors and route users. Scottish Enterprise's destination baseline survey (SQW Consulting, 2010) derived a GVA ratio of 42%, as applied to direct visitor spend. On this basis, GVA for estimated visitor expenditure is £380,520.

8. REVIEW OF POTENTIAL SOCIAL AND HEALTH BENEFITS OF ROUTE DEVELOPMENT

The study brief included specific requirement to explore the potential benefits of route development in relation to the promotion and delivery of Scottish Government Healthy Living objectives as well as other relevant national/local initiatives, which are considered in brief below.

8.1 Health benefits

The Scottish Health Survey 2012 (Scottish Government, 2013) revealed that in Scotland, 38% of adults are failing to meet minimum activity recommendations of 150 minutes of moderate activity or 75 minutes of vigorous physical activity per week, with men more likely to achieve the target than women (67% of men meeting the target compared with 58% of women). Just under two-thirds (64.3%) of adults were overweight or obese, and over a quarter (27.1%) were obese. The same survey suggests that 27% of boys and 37% of girls aged 2-15 were failing to meet minimum activity guidelines of at least 60 minutes a day (including school-based activity), and approximately one-third (32.5%) of children within the same age bracket were not considered to be a healthy weight.

Physical inactivity contributes to nearly 2,500 deaths in Scotland each year (Scottish Government, 2013), accounting for 42% of total deaths from coronary heart disease, 25% of all stroke-associated deaths and 25% of deaths from colon cancer. Put another way, individuals who are active are 1.9 times (i.e. nearly twice) less likely to have a heart attack compared with their inactive contemporaries (Blair et al, 1992). The cost to the NHS of physical inactivity is estimated at £91 million per year. An inactive person spends 37% more days in hospital and visits the doctor 5.5% more times than an active person (Sari, 2008). People over 50 who are physically active enjoy between 1.1 and 3.7 more “quality life years” than average (Heron and Bradshaw, 2010).

A 10% increase in physical activity combined with a better diet could prevent many unnecessary deaths, and save the health service millions of pounds (Physical Activity Task Force, 2003). Walking and cycling are the easiest and most accessible forms of activity for most people, free at point of delivery. Recent research commissioned by NHS South West assessing the economic value of investment in walking and cycling (Davis, 2010) identified median cost:benefits of 19:1 across a range of studies and data sources, and concluded that *“Investment in infrastructure which enables increased activity levels amongst local communities through cycling and walking is likely to provide low cost, high-value options providing benefits for our individual health, the NHS in terms of cost savings, and for transport as a whole.”* Social return on investment evaluation of Stirling Walking Project (Carrick and Lindhof, 2011) found that every £1 invested generated £9 of benefits. Both the local authority and NHS had benefited as individual health has improved and demand for services has reduced.

In a survey undertaken as part of an independent assessment of the socio-economic value of local path networks (HECLA, 2007), 60% of respondents indicated that use of a local path network had greatly increased their level of physical fitness through providing access to opportunity for regular exercise. 90% of respondents reported that they felt less stressed as a result of using the local path network. Over 80% of respondents indicated that their use of local paths allowed them to meet people and feel part of the wider community. The report concluded that over and above the economic or direct health benefits, *“path networks generate a wide range of non-market benefits.... Existence of local path networks clearly underpins the development of social capital and the building of social relationships... Where a path has a clear purpose in terms of an identifiable route, preferably of a circular nature, the local population are encouraged to use it on a regular basis.”* There is extensive

evidence that links engagement with natural scenes, for example through outdoor exercise, with relief from stress and feelings of wellbeing (Physical Activity and Health Alliance, 2007).

No attempt has been made to quantify the direct or indirect health benefits of LDRs in the UK, but there is little doubt that LDRs have the potential to contribute to health benefits of the local population and visitors, including:

- Improved performance of the heart, lungs and circulation.
- Lowered blood pressure
- Reduced risk of coronary heart disease and strokes.
- Weight management, with knock-on benefits for improved body image and self-confidence.
- Reduced risk of Type 2 diabetes
- Reduced risk of certain cancers
- Improved flexibility and strength of joints, muscles and bones, and reduced risk of osteoporosis.
- Boosts to the immune system
- In older age add to active years of life by increasing strength and muscle bulk; preserve daily living activities, reduce isolation and institutionalisation.
- Improved mental health, reduced risk of clinical depression, improved sleep patterns and increased release of endorphins which improve mood and reduce stress and anxiety. A recent survey by mental health charity MIND found that 94% of people felt that green exercise improved their mental health and the combination of nature and exercise is most important in determining how they feel.

The Mental Health Foundation found that regular physical activity was shown to be as effective as antidepressant drugs or psychotherapy in treating mild and moderate depression in a number of studies (Mental Health Foundation, 2005). The Mental Health Foundation is campaigning for increased use of exercise referral schemes in treating mild to moderate depression, and raising awareness that physical exercise is one of the most effective ways to look after and improve your mental health.

All of the benefits identified above could be achieved to greater or lesser extent through development of readily accessible paths on Mull, such as the proposed LDR.

8.2 Role of Mull LDR in achieving Scottish Government targets

To quote from the Scottish Government website, "*Getting and keeping more Scots active is a health challenge that the Scottish Government is passionate about taking on.... Making Scots active for life is one of the Government's over-arching policy objectives*". In pursuit of this goal, in 2008 the Scottish Government set out an action plan for encouraging healthier eating, increasing physical activity and reducing obesity. One of the key objectives was to create, improve and maintain the supply of natural and built environments encouraging more active lifestyles, including opportunities for walking and cycling.

By providing outdoor access facility and infrastructure in the form of a well-designed, waymarked route, and by encouraging people to use the route, the proposed Mull LDR would contribute towards delivery of the Scottish Government's National Performance Framework in respect of:

National outcomes

- We live longer, healthier lives
- We have tackled the significant inequalities in Scottish society, particularly health inequalities

- We value and enjoy our built and natural environment and protect and enhance it for future generations
- We have strong, supportive and resilient communities where people take responsibility for their own actions and how they affect others
- We reduce the local and global environmental impact of our consumption and production
- We live in well-designed sustainable places where we will be able to access the amenities and services we need.
- We take pride in a strong, fair and inclusive identity.
- We have improved the life chances for children, young people and families at risk
- We live in a Scotland that is the most attractive place for doing business in Europe
- We realise our full economic potential with more and better employment opportunities for our people
- Our children have the best start in life and ready to succeed
- Our public services are high quality, continually improving, efficient and responsive to local people's needs

National Indicators

- Increase the proportion of adults who rate their neighbourhood as a good place to live.
- Reduce mortality from coronary heart disease among the under 75s in deprived areas.
- Reduce the rate of increase in the proportion of children with their body mass index outwith a healthy range by 2018.
- Increase the proportion of adults making one or more visits to the outdoors a week.
- Reduce the proportion of people aged 65 and over admitted as emergency inpatients two or more times in a single year.

8.3 Paths to Health

Paths for All Partnership (PFAP) has been the main driver in development of Paths for Health projects all around Scotland, supporting local projects aimed at delivering local, targeted health walks through advice, grants, information and training. The majority of projects have revolved around appointment of a project co-ordinator who works closely with regional and local medical practitioners at all levels to develop and deliver appropriate outdoor activity programmes (both walking and cycling). Guided walks and cycle rides are amongst the most common activities, with the length and pace of activity designed to cater for a wide range of participants of all ages and abilities. Dundee, for example, has established strollers walks targeting young mothers with buggies and prams. On Islay, local walking programmes have been developed targeted at the other end of the age spectrum, focusing on reducing social isolation amongst older people and encouraging them to get out and walk. The social appeal of group walks, and a regular weekly programme, is particularly important for people who are not particularly physically active at present.

Cairngorms Walking to Health (<http://www.snh.gov.uk/land-and-sea/managing-recreation-and-access/healthier-scotland/green-exercise-projects>) is a particularly inspiring example of a successful project run by the Cairngorms Outdoor Access Trust which encourages people to become more physically active through a programme of regular short, safe, social walks in their local area led by over 60 trained volunteers. Some of the walks have been developed in association with health professionals targeting specific health issues such as diabetes, Alzheimers, weight loss and smoking cessation. Walkers' participation and interest is motivated by the countryside, scenic appeal and wildlife appeal of the walks. A review of the

project concluded that making the most of projects which involve activity rather than medication depends on integration of both principles and practice into the health service.

There are no current paths to health initiatives on Mull, although the local ranger is currently in discussion with Bunessan surgery regarding development of a referral scheme for local residents on the Ross of Mull and Iona. Consultation with the Tobermory surgery suggests that even if health professionals in the north of the island were considering such a scheme, they would be unlikely to use the proposed LDR due to the distance involved.

8.4 Role of proposed LDR in providing an aspirational goal for health projects

White Mountain Dreams is an example of an innovative project of potential direct relevance to the proposed LDR in demonstrating the value and importance of long-term goals to encourage participation in healthy exercise projects. Using Scotland's wild places and mountains as its basic resource, White Mountain Dreams entices participants to change ingrained habits of inactivity by setting a series of attainable, exciting goals, building up from short low level walks to climbing Ben Nevis at the end of the six-month programme. The West Highland Way and other LDRs provide goals for many other mental and physical health programmes, as could the Mull LDR, particularly because of its relatively short length and outstanding scenic appeal.

9. CONCLUSIONS

The Ross of Mull and Iona Community Plan identified as its vision “an even more attractive place in which to live, work and visit by revitalising our fragile and distinctive settlements and communities, with an upgraded infrastructure, wholly in keeping with our outstanding natural environment”. There seems little doubt that development of a long distance off-road route between Craignure and Fionnphort could help achieve this vision. Mull’s spectacular scenery, rich archaeological and natural heritage interest and the unique spiritual and religious significance of Iona coupled with the opportunity to walk or cycle coast to coast across one of the Inner Hebrides are all factors likely to appeal to LDR users, which will help shoot the route fairly high up the LDR ratings list from the outset.

Arguments in favour of route development include:

- The proposed route would create a new visitor attraction for Mull with scope to attract new visitors to both Mull generally and the Ross of Mull in particular, and to encourage existing visitors to stay longer and spend more, with consequent economic benefits.
- Route development would capitalise on the existing high levels of interest in Iona and encourage more sustainable “transport” options across Mull to reach Iona.
- The combination of features including the cradle of Christianity, coast, spectacular and very varied scenery and visit to a Scottish island offer would potentially put the proposed route high up the LDR rankings in terms of interest and level of use.
- The route is potentially of very significant interest to international visitors, its relatively short length and easy accessibility by train to Oban providing opportunity for inclusion in Scottish tour programmes.
- In providing a route suitable for walkers of a wide range of ages and abilities, the proposed Mull LDR would complement rather than in any way duplicate the existing Stevenson Way, which is too challenging for most everyday walkers, and for most pilgrims.
- Investment in signage, waymarking and good quality infrastructure would meet demand amongst visitors for clearly waymarked routes which are easy to identify and follow on the ground and which would enable them to better explore and enjoy Mull on foot or cycle.
- There is scope to develop and promote sections of the proposed LDR as circular walking routes, which would create visitor attractions in their own right.
- Promotion of sections of the route accessible by public transport could develop an additional attraction for self-catering accommodation.
- Experience of other pilgrimage routes at home and abroad suggests that there is significant scope to build upon the existing interest in pilgrimages across Mull, both as a standalone route and as part of a longer route to St. Andrews. Development of Scotland’s first true pilgrimage route across Mull would undoubtedly attract significant media attention and raise the profile of the route from the outset, further complimented by recent significant investment in interpretation and promotion of Iona Abbey as a pilgrimage destination.
- The proposed route would simultaneously create new safe, off-road opportunities for local people to walk, cycle and ride, with associated health benefits.
- In providing an achievable goal, the route would inspire people of all ages to take more exercise in order to complete the full length.
- For cyclists, the route connects directly to the Oban to Fort William section of the National Cycle Network.
- Proposed development of the Tyndrum to Oban Path would link the Mull LDR to the West Highland Way.

- The route would almost certainly attract high levels of interest for challenges and events including marathons, triathlons, trail and sail/paddle, all with potential to further raise the profile of the route and bring added economic benefits.
- There is significant potential for business development and economic benefit through route development.
- Most local businesses on Mull within the route corridor said that they would love to be in the position where they were struggling to meet demand, and would welcome the additional business and scope for development which LDR development would bring.

The purpose of HM Treasury's Green Book is *"to ensure that no policy, programme or project is adopted without first having the answer to the following questions:*

*Are there better ways to achieve this objective?
Are there better uses for these resources?"*

In order to answer these fundamental questions, the aims of route development need to be clearly defined.

Research and consultations undertaken in the course of this study suggest that there is undoubtedly scope to develop walking and cycle tourism on Mull, and deliver health and social benefits more locally, without necessarily developing a long distance route. Development and promotion of a selection of clearly waymarked multi-use paths, for example around Fionnphort, would be a good start, but the level of competition from other similar walking tourism initiatives is high both within Scotland and elsewhere in the UK.

Numerous issues identified during the course of the study raise questions as to whether the economic, health and social benefits justify the costs of developing a hard surfaced combined walking and cycling route linking together sections of the old road. These include:

- Demand amongst cyclists for an off-road alternative to the A894 is difficult to quantify without any baseline data.
- Conflict between the characteristics desirable in a long distance walking route and those required to attract high levels of use of a long distance cycling route. Cyclists generally prefer a formalised bound or hard, level surface, which is not conducive to long distance walking.
- Without very considerable investment, significant lengths of the proposed route (most notably at either end of the route) would remain on road or on pavement alongside the main road, which seriously undermines the potential appeal to walkers or cyclists.
- Shortfall in availability of existing serviced accommodation and services.
- Distance between existing accommodation is too far for most walkers, particularly through Glen More.

Attempts to forecast future route usage and estimation of economic and other potential benefits which may derive from the proposed Mull LDR are undermined by the lack of baseline tourism data specific to Mull. Forecasts for other proposed routes produced by economic modelling appear optimistic, to say the least, when compared with existing LDRs. Drawing on experience of other LDRs or pilgrimage routes potentially offers a more accurate guide to the level of use which might be generated, but reliable user number statistics are limited. Very few SGTs have an effective monitoring programme. Any figures produced for the proposed route are therefore at best speculative, and very much depend on route development attuned to the interests and needs of the target audience(s). Upgrading, surfacing and signage of the sections of old road through Glen More may help get cyclists off the road for part of the way between Craignure and Iona, but falls far short of the vision of an off-road long-distance cycle route across Mull, and is unlikely to attract the number of LDR walkers or pilgrims which a route incorporating coastal sections has scope to offer. If

resources allow, the ideal would be to develop a braided route, including new off-road multi-use paths at either end, but with a coastal walking option linked to accommodation in the middle. Few would argue that this would create a route in a class of its own, offering scope to deliver a product unique to Mull, and in so doing to generate economic benefits very significantly beyond what other forms of path development might do.

10. RECOMMENDATIONS FOR FUTURE ROUTE DEVELOPMENT

10.1 Statistical survey data

Potential funders are likely to seek far more robust data about interest in the route and potential for future usage than can currently be produced from the very limited, and in some cases unreliable, statistical data available. Although it can always be argued that expression of interest or intent to use a route is very different to actual route usage, it is recommended that some attempt be made to establish the actual level of walking and cycling interest in the proposed Mull LDR amongst both local residents and visitors. This might include:

- Intercept survey of ferry passengers. Given the problems experienced in previous Holiday Mull and MICT surveys, a more cost effective way of conducting a survey might be to interview passengers on the Oban to Craignure and Fionnphort to Iona ferries using a short standardised questionnaire.
- Inclusion on Holiday Mull website of simple survey monkey questions to establish baseline information on visitors e.g. are you interested in walking, cycling, wildlife watching etc. together with more specific question(s) re. potential interest in LDR

Reliable and readily available data on usage of other LDRs would be a considerable help to all managers of existing LDRs and those considering development of new routes. At a national level, it is recommended that:

- user monitoring methodology guidelines be produced drawing on experience from around the UK, including a variety of options for user survey and analysis, and recommendations to help route managers devise and implement an effective user monitoring strategy;
- all SGTs be encouraged (or even required) to make more stringent and effective attempts to record user numbers at key points along the route using appropriate methodology.

Consideration might also be given to recording and collation of visitor accommodation occupancy rates, for example through Holiday Mull, and to establishing reliable baseline data regarding visitor numbers to Mull, possibly in conjunction with VisitScotland and CalMac.

10.2 Target audience

Taking account of all of the issues and factors identified during the course of this study, in order to maximise the benefits, it is recommended that consideration be given to development of separate signed routes, in part if not full length, designed specifically with walkers and cyclists in mind, as on the Hebridean Way, Coast to Coast route in Northern England, Via Francigena and various other routes. Notwithstanding this, in keeping with the Land Reform (Scotland) Act and Disability Discrimination Act, the proposed route(s) should be as accessible as possible to as wide a range of people as possible, but without compromising the character of the route, the countryside through which it passes or the interests of the key target audience(s). In accordance with good practice, the least restrictive option should be adopted wherever possible, using self-closing gates rather than stiles.

10.3 Cycle tourism development

Further consideration is required, ideally based on appropriate market research, as to whether the very significant costs of developing an off-road cycling route between Fionnphort and Craignure are justified by the likely level of use and associated economic and other benefits. Irrespective of proposed LDR development, discussion with individual cyclists and a random sample of cycling clubs around Scotland suggests that there is scope

to do a lot more to promote cycle tourism on Mull. This might include identification and promotion of recommended routes for touring cyclists, encouragement of local businesses to develop cycle storage and repair facilities, promotion of Cyclists Welcome schemes and proactive marketing through appropriate media coverage. Cycle tourism development and promotion on Mull in advance of or in conjunction with LDR development would help capitalise on this increasing market.

10.4 Route alignment

As previously noted, evaluation of possible route options was beyond the scope of the socio-economic study, but the route(s) chosen for development is/are absolutely critical to future route usage and associated benefits generated. Route alignment should take account of and link directly with local settlements in order to satisfy accommodation and service requirements of route users, and to maximise economic benefits. Decision as to the precise routing, particularly for a walking route, should also take into consideration the factors identified as essential to the success of LDRs and pilgrimage routes. With this in mind, it is recommended that an LDR aimed primarily at walkers be developed including different types of path and track, including coastal sections, rather than rely wholly on the old road or path alongside the A894, and that a multi-use route aimed primarily at cyclists but with facility to accommodate walkers, cyclists and horse-riders of all ages and abilities be developed incorporating the old road through Glen More.

10.5 Quality of route infrastructure

Striking the right balance between developing and maintaining a sustainable high quality route which meets route users' needs and demands and is capable of absorbing relatively high levels of use without becoming over-formalised can be difficult to achieve, but is worthwhile in terms of the economic returns. It is recommended that the walking arm of the Mull LDR be designed and developed to meet SGT standards and those required to achieve accreditation as one of European Ramblers Association Quality Trails, and that NCN standards provide the yardstick for any cycling route development across Mull. SPRF are currently developing pilgrim route accreditation scheme to meet the clear need for a set of criteria and operating standards that will help define pilgrim routes in different geographic context around Scotland. As a key component of the proposed Iona to St. Andrews pilgrimage route, it is recommended that the proposed Mull LDR strive to meet the standards set by SPRF.

10.6 Accommodation and services

Development of suitably spaced accommodation and services to meet the needs of route users will be critical to the success of the route. Active measures will need to be taken to develop identified accommodation gaps through Glen More and/or along any coastal path via Carsaig. In order to make best use of accommodation from both user and provider perspective, and to cater for as wide a range of possible users as possible of varying interests, levels of fitness, accommodation and service requirements, it is recommended that a range of possible options are developed tailored to different types of potential route users, and ferry timings.

Development of the necessary accommodation and support services is all too often a chicken and egg situation: few are ready to set up a business without clear evidence of demand, yet without readily identifiable accommodation of the right type and quality, the number of people using a route is likely to be limited. Some of the most successful examples of business establishment and economic benefit linked to LDR development have been prompted by workshops in tandem with physical route establishment run by the route manager, usually in conjunction with business development advisors. Examples include the Hadrians Wall Path and Mary Towneley Loop on the Pennine Bridleway. Other routes,

particularly those in more rural or remote areas such as the Kintyre Way, have adopted a different approach in personally visiting existing and potential businesses on or within several miles of the route to explore scope for their involvement and business development. The Great Glen Way route managers run annual sessions for all businesses along the route, offering insights into trends in route usage and development which can help business development, inviting comments on how the route can be improved, and signing up those willing to advertise in future accommodation guides. These business workshops are important in maintaining two-way communication, flagging up opportunities for development, and identifying appropriate action to plug missing gaps in accommodation and services or to address specific issues which arise.

Drawing on experience elsewhere, it is recommended that a combination of these approaches be adopted i.e. workshops and targeted contact with existing and potential businesses. Opportunity might also be taken to explore local interest in development of community-owned hostels, bunkhouses and support services.

10.7 Delivery of health programmes and initiatives

The first step in promoting use of the proposed route(s) as part of formal health initiatives is to convince local health practitioners of the benefits of outdoor exercise, and the scope offered by the route to help individuals set and strive towards a series of achievable targets. Paths for All Partnership have an impressive track record in setting up and running successful Paths to Health schemes and should be involved in developing an appropriate approach for the Ross of Mull.

10.8 Route name(s) and branding

Previous research has clearly identified the importance of a route's name in establishing unique identity, enabling people to pinpoint it on a map, inspiring interest and attracting high levels of route usage. The current working name for the proposed route "Across the Ross" is short, snappy and modern, and successfully incorporates something of the pilgrimage element without offputting would-be users with no religious interest. On a less positive note, few people (even in Scotland) would identify with the Ross, hence failing to capitalise on the iconic appeal of Mull or Iona. Careful thought is required to whatever name(s) are adopted, and to develop a strong brand for the route(s) which will help with future promotion.

10.9 Marketing strategy

With the notable exception of Wainwright's Coast to Coast route from St. Bees to Robin Hood's Bay, and other long established routes such as the West Highland Way whose reputation already generates sufficient levels of interest, the success of most routes in attracting sustained levels of use depends on effective marketing. Inclusion on national websites such as the Long Distance Walkers Association (www.ldwa.org.uk) and Walk Highlands (www.walkhighlands.co.uk) can help establish a web presence, as can recommendation through social media, but in order to compete with the increasing number of other LDRs, an effective marketing strategy is likely to include a dynamic website and active pursuit of national media coverage. Promotion through VisitScotland, national (e.g. Edinburgh) and regional (e.g. Fort William) Visitor Information Centres is an obvious choice, and similarly promotion through other key visitor hotspots e.g. the Green Welly Shop in Tyndrum. Promotion to walkers and cyclists using other LDRs through publicity at venues and accommodation on route, and through links to their websites, is a relatively cheap and easy way of targeting appropriate audiences. Highland and Scottish Borders Council have for the last few years taken stands at the Great Outdoors Show in London.

Other LDRs both in Britain and Europe provide a wide range of positive ideas and relevant experience in relation to route marketing. In Italy, for example, the Via Francigena is

promoted by a summer large-scale outdoor photographic exhibition which tours towns along the route targeting visitors who would otherwise be unaware of the route. The Edinburgh Festival is one of many potential marketing opportunities which could be used to raise the profile of the Mull LDR. The Ruta de la Plata's proactive marketing campaign involving roadshows travelling around Britain and other parts of Europe has reportedly surpassed expectations in successfully raising awareness of and use of this Spanish pilgrimage route. In Switzerland LDRs are promoted by huge panels at train stations both on and off route, and by route maps printed onto the tables within train carriages. In some cases the whole wall of a station waiting room is dedicated to a specific route, with no other advertising anywhere on the station. Both of these ideas have great scope for promotion of a Mull LDR, particularly stations at Oban, Glasgow and the west coast line. Other ideas from the Via Francigena include development of special deals for pilgrims walking the route with a valid passport, such as free entry to museums or historic sites.

10.10 Public transport

Existing bus services already provide a link between the start and finish points at either end of the route, and offer some scope for completion of individual sections of route as shorter walks/cycle rides. To maximise route usage, it is recommended that scope for further development of public transport services be explored and actively promoted. Examples of similar developments elsewhere in the UK include the Pembrokeshire Coast Path where hourly services to and from the main access point on the path around St. David's are increased to half-hourly during July and August. Other sections of route offer three services a day (Strumble Shuttle, Poppit Rocket, and Puffin Shuttle) which enable people to stay in one place and walk the whole route sequentially by using buses. A similar initiative would be particularly relevant on Mull which already has a relatively high number of self-catering properties, and more in course of development. The relatively short length of the proposed route could help develop the self-catering visitor sector as route users.

10.11 Promoting local awareness of the route

Accommodation providers and other businesses both on Mull, in and around Oban, and elsewhere in the region can play an important part in route promotion, and in encouraging and inspiring people to use the route. It is recommended that a series of visits be organised for business proprietors and their staff to enable them to see first-hand some of the route's unique selling points, which experience elsewhere has proved is highly influential in onward recommendation to visitors. The payback for businesses is that appreciation of local knowledge often encourages return visits and personal recommendations.

10.12 Monitoring

Development and implementation of an effective monitoring strategy encompassing route usage and socio-economic benefits should be integral to development of any LDR. The strategy should be regularly reviewed to ensure that it is capturing relevant and meaningful data, and to ensure that feedback from survey results informs future development, promotion, marketing and maintenance.

11. REVIEW OF DIFFERENT FUNDING AND MAINTENANCE APPROACHES ADOPTED ELSEWHERE

The project brief included requirement to “*provide examples of successful approaches implemented elsewhere to funding and delivering long term maintenance that could be applicable to the proposed Mull LDR*”. It was agreed at the inception meeting that where possible these would be identified during consultation with route managers about route usage, and information already known to the consultant would also be included, but that comprehensive review of funding and maintenance approaches used on other LDRs was beyond the scope of the brief, or the project resources. Funding opportunities for route establishment are usually different to those which may be available for route maintenance.

11.1 Route establishment

Sources of capital funding and mechanisms used to establish routes vary considerably. The days of high percentage, in some cases 100%, government funding through SNH (or its predecessor Countryside Commission for Scotland) or Natural England (and its predecessor Countryside Commission) with the remainder coming from the relevant local or access authority are long since gone. In recent years, the main funding mechanisms used to establish routes have been:

- Heritage Lottery Funding e.g. Annandale Way
- Leader or other European Funding e.g. Outer Hebrides Way, South of Scotland Countryside Trails, Mull of Galloway Trail, North Sea Trail
- Coastal Communities Fund
- Sports Lottery Fund
- Foot and Mouth Recovery Fund

The Scottish Rural Development Programme (SRDP) has to date provided very little scope for LDR development or maintenance, but changes proposed for the next iteration of the scheme may make it more relevant to LDRs in future, particularly if external agencies are eligible to apply for and undertake collaborative work on a number of holdings subject to the necessary consent from owner-occupiers.

Charitable or private investment in LDRs is comparatively rare in the UK, but should not be ruled out. The Alternative Travel Group (ATG) offers guided and self-guided walking and cycling holidays in many parts of the world, but is particularly well known for the trips it organises on pilgrimage routes. Unusually for a travel company, ATG has established a charitable trust which has been working with local communities in Tuscany to develop much-needed accommodation on under-developed parts of Via Francigena, and has also financed capital improvement work on the route itself. Given their particular interest in historic and pilgrimage routes, it would be worth approaching ATG to explore potential involvement in the Mull LDR.

11.2 Route maintenance

Securing funding for ongoing route maintenance is widely acknowledged by route managers as the single most difficult aspect of any LDR. Most if not all of the funding sources for route creation require commitment to future maintenance, but preclude funding for this purpose. The mechanisms used to get around this problem are as diverse as LDRs themselves. Some examples are summarised below.

11.2.1 Annandale Way

The very limited capital budget available through the HLF funded Sulwath Connections project was a significant factor in route design and alignment, but nevertheless necessary

capital work to establish the route was all specified and implemented to a high standard to minimise future maintenance requirements, including heavy duty metal self-closing bridgates and action to address drainage issues before the route was opened. Community volunteers from local walking groups and economic development initiatives survey the route twice yearly, at the beginning and end of each season (i.e. spring and autumn). Issues such as overgrown vegetation, fallen trees, drainage problems or replacement signage required are logged on a form, together with suggested improvements to the route, which is returned to the relevant Dumfries and Galloway Council access ranger, who then co-ordinates necessary physical work. There is no specific budget for route maintenance or improvements, and as such maintenance work is funded on an ad hoc basis from the access authority's limited countryside access budget.

11.2.2 Borders Abbeys Way and Southern Uplands Way

Maintenance is undertaken by and funded through the Countryside Access Team of Scottish Borders Council as part of the wider access network on an ad hoc basis as and when issues arise. There is no specific budget allocated for maintenance of these LDRs.

11.2.3 Fife Coastal Path

The Fife Coastal Path is mainly managed by the Fife and Coast Countryside Trust. The Trust was set up to support the path, which is the jewel in the Trust's crown, although the Trust also manages various other aspects of the Fife coast and countryside. Maintenance is seen as absolutely critical to the outstanding success and good reputation of the route. Maintenance for the Fife Coastal Path is funded 50% by the access authority, and the remainder by external funding, including charitable sources, sponsored walks, schemes such as the Big Green Footprint and other mechanisms. The Trust employs three rangers and eight maintenance staff who are responsible for auditing the trail quarterly and prioritising future work. Maintenance issues on the route identified as a potential health and safety risk are dealt with by the maintenance staff within 24 hours. Those which are considered high priority but not an immediate risk to route users are programmed for attention as soon as possible, and medium/low priority issues are tackled on a longer time scale.

11.2.4 Hadrians Wall Path

Until 2013, Natural England met the full cash costs of maintaining Hadrians Wall Path and other National Trails, with contribution in kind from relevant local authorities or other organisations e.g. in the form of labour, materials or marketing. Under the New Deal arrangement, all National Trails are now managed by a partnership which is required to contribute 25% hard cash towards route maintenance and promotion. Repeated approaches have been made to the many commercial companies whose business relies wholly or in part on Hadrians Wall Path to try and get a voluntary contribution, say 50p/booking from baggage transfer, packaged tour operators or accommodation providers. Despite the very high level of use of the path, and the fact that many of these businesses set up only after path development, none currently make any financial contribution.

11.2.5 Kintyre Way

The Kintyre Way is unique amongst SGTs in being managed by the community based Long and Winding Way Company, with a board of voluntary directors made up of local business people. Route maintenance costs are estimated at £50k p.a. Significant funding has recently been secured from Coastal Communities Fund for a two-year project focusing on training and employment linked to the route through a series of employability placements and apprenticeships, which in the short-term will tackle maintenance in the course of training, and longer-term it is hoped will provide a local pool of suitably qualified and

experienced individuals who can be contracted back in to tackle maintenance. Options for longer-term funding are currently being explored, including commercial sponsorship, wind farm community chests, turbine purchase, employer wage incentives and various others.

11.2.6 Mull of Galloway Trail

Stranraer Rotarians, who initiated and set up this route, have also adopted maintenance responsibility. Volunteers from the Rotary Club identify issues such as vegetation clearance which may be required, The group previously received capital funding to help purchase mowers, strimmers and other small scale equipment which they use for mowing some sections, but have no budget for any other maintenance work. Dumfries and Galloway Council assist with some specific problems.

11.2.7 Rob Roy Way

The Rob Roy Way is unusual in that it was initiated and set up by two individuals with a keen personal and commercial interest in long distance routes: John Henderson of Walking Support, and Jaquetta Macgarry. The route has developed organically, from early days of a written description but no waymarking, landowner negotiation or infrastructure improvements, to the current situation whereby respective access authorities have accepted maintenance responsibility. No specific budget has been allocated for the Rob Roy Way, so work has to be prioritised and tackled on an ad hoc basis, within which constraints attempts are made to improve the route each year.

11.2.8 St. Cuthbert's Way

St. Cuthbert's Way is the only existing "pilgrimage" route in Scotland, linking Melrose in the Scottish Borders where St. Cuthbert started his work to Holy Island where he ended his life. Initially developed as part of a local economic regeneration programme, it is now managed by a steering group comprising representatives of Scottish Borders Council, Northumberland National Park Authority, and Northumberland County Council. Various issues have been identified which are limiting route usage, including inadequate signage and waymarking on the English section of route, but maintenance funding is an ongoing challenge, particularly with dwindling local authority budgets. Inspired by St. Oswald's Way, in 2011 the steering group secured Leader funding for development of a series of short walks off the LDR, with the intention of using sales of the resultant guidebook to fund future maintenance.

11.2.9 South of Scotland Countryside Trails

The Cross Borders Drove Road and Romans and Reivers Route are two linear sections of the 350 km South of Scotland Countryside Trails multi-use network which was developed on a partnership basis with capital funding from HLF, European Regional Development Fund, SNH and Forestry Commission. All of the capital work involved in establishing and developing routes was very deliberately specified and implemented to the highest standard to minimise future maintenance requirements, including installation of tried and tested heavy duty self-closing gates with integral H-frame which are far less likely to require regular adjustment than normal gates. Emphasis was on retaining natural surfacing wherever possible, but in addressing all drainage issues, no matter how small, which is essential to sustainable multi-use. As a result, eight years after the routes were opened, the amount of maintenance required has been negligible, whereas other routes which have been implemented with the bare minimum of capital improvement have far higher maintenance requirements. Scottish Borders Council as the access authority covering the majority of the two recognised SGTs have recently commissioned a photographic audit to assist with identification and prioritisation of any issues which may arise in future, which will be funded through the regional access budget.

11.2.10 South West Coast Path

The long distance coastal path around south-west England is unusual amongst England and Wales' National Trails in having established a voluntary association which campaigns to improve the path and raises money to help it happen. In recent years, the role of the South West Coast Path Association in raising funds to improve the path has increased, which in turns is helping to unlock other money. Typically every £1 raised by the Association has enabled the South West Coast Path team to secure about £3 from other resources. Commitment from the Association of £80,000 towards route improvements was one of the key factors in the team successfully securing £2.1 million from the English Rural Development Programme to deliver the Unlocking our Coastal Heritage project. Other projects which the Association has helped fund are the sculptures at either end of the path, and at the midpoint of the path; essential work to enable reopening of sections of path following cliff falls, and constructions of new sections of path. Individual annual membership of the Association costs £13.50, in return for which members receive two newsletters, a series of booklets giving detailed path descriptions, a log book and souvenir map on which to track their progress walking the route, and an annually updated guidebook including accommodation listings, tide tables and ferry times.

11.2.11 West Highland Way

The majority of maintenance work on the West Highland Way is funded through respective access authorities (Loch Lomond and Trossachs National Park Authority, Argyll and Bute Council, Stirling Council, Highland Council). Profit from sale of route-specific merchandise amounting to approx. £20k p.a. is also used to fund specific projects on the route. Small-scale work is generally undertaken by access authority dedicated staff (rangers, maintenance team etc.), with larger scale work put out to contract.

11.2.12 West Island Way

Responsibility for management and maintenance of the West Island Way falls to Mount Stuart Trust, who established the route. Significant capital improvements were undertaken through the Discover Bute Landscape Partnership Project, including surfacing of some sections, replacement of stiles with gates and other work which might otherwise have presented longer term maintenance issues. Until recently, Argyll and Bute Council provided approximately £3k p.a. funding towards route maintenance, but due to local government budget cut-backs, this has now stopped. Bute Conservation Trust, which took over the legacy of Discover Bute LPP contributes annually towards maintenance, including work such as mowing and verge cutting put out to contract. The full-time countryside ranger for Bute who is part SNH funded co-ordinates all maintenance work, some of which is undertaken by a team of 15 conservation volunteers through monthly work-days repairing bridges, clearing rhododendron etc. Funding and materials for other maintenance work are begged or borrowed as and when required on an ad hoc basis.

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ANNEX 1: APPLICATION OF METHODOLOGY USED IN TYNDRUM TO ECONOMIC IMPACT STUDY TO PROPOSED MULL LDR

Estimated target population by drive time:

| Drive time/ proximity to route <i>approx. population figures</i> | Total Population | Adults (using same % as Tyndrum to Oban Study) |
|---|---------------------|---|
| 0-20 minutes/ Living along route corridor Bunessan 300, Fionnphort 150, Craignure 200 + Pennyghael, Lochdon, Strathcoil, Lochbuie, Carsaig, Uisken) | 875 | 700 |
| 21-60 minutes /rest of Mull (1,825) and Iona (125) | 1,950 | 1,560 |
| 61-120 minutes/ Oban (8,500), Fort William, mid-north Argyll | 45,000 | 36,000 |
| Total | | 38,260 |

Scottish Recreation Survey 2011 Walking Trips

Proportion of adult population making trips to the outdoors for leisure or recreation in previous 12 months 83%

Average no. of trips per person in 4 week period 6.6
Average no. of trips per person in year 85.6

Proportion of walking trips – main activity 71%
Proportion of walking trips – any activity 80%
(excluding mountaineering and hill walking)

Estimated number of adult trips by drive time

= estimated population by drive time x proportion adult population making trips to the outdoors for leisure or recreation (83%) x average no. trips/person/year (85.6%) x percentage for whom walking was main or any activity

Methodology outlined in Tyndrum to Oban study identified walking trips relevant to the LDR as 16.59% of walking trips as main activity (excluding local parks, open spaces and beaches)

| | Drive time | | | Total |
|---|------------|------------|-------------|-------|
| | 0-20 mins | 21-60 mins | 61-120 mins | |
| Walking trips main activity | 35,311 | 78,693 | 1,815,986 | |
| Estimated no. of relevant walking trips | 5,985 | 13,330 | 307,628 | |
| Estimated no. of relevant cycle trips | 348 | 777 | 17,928 | |

| | | | | |
|---|-------|--------|----------|-------|
| Combined no. estimated relevant walking and cycling trips | 6,333 | 14,107 | 325,556 | |
| Assumed penetration rate | | | | |
| <2 miles | 1:5 | 1:200 | 1:50,000 | |
| 2-8 Miles | 1:7.5 | 1:50 | 1:20,000 | |
| >8 miles | 1:10 | 1:100 | 1:25,000 | |
| Estimated user nos. | | | | |
| <2 miles | 1,266 | 71 | 6 | 1,343 |
| 2-9 Miles | 844 | 282 | 16 | 1,142 |
| >8 miles | 633 | 141 | 13 | 787 |
| Estimated total user nos. | 2,743 | 494 | 35 | 3,272 |
| % total users | 54% | 42% | 4% | 100% |

Estimated tourist use of the Mull LDR

Using the same baseline tourism data relating to Argyll and Bute as that used for the Tyndrum to Oban route study

| | Low scenario | High scenario |
|--|--------------|---------------|
| No. of holiday tourist trips | 553,440 | 553,440 |
| Proportion walking as part of holiday | 40% | 40% |
| No. holiday trips involving walking | 221,376 | 221,376 |
| Assumed penetration rate | 2% | 3% |
| No. walking tourists | 4,428 | 6,621 |
| Proportion cycling as part of a holiday | 8% | 8% |
| No. holiday trips that involve cycling | 44,275 | 44,275 |
| Assumed penetration rate | 1% | 2% |
| No. cycling tourists | 443 | 885 |
| Estimated total overnight tourist users | 4,870 | 7,527 |

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