



In April 2004, the Southern Uplands Partnership (SUP) commissioned the Crichton Tourism Research Centre (University of Glasgow) to investigate and report on the current usage of the Southern Upland Way (SUW). The purpose of this exercise was to establish the potential for the SUW to enhance the economic status of the south of Scotland through increased numbers of Long Distance Walkers and recommend what actions could be undertaken to maximize identified opportunities. As part of this report, a survey questionnaire was sent to a range of businesses, within 15 miles of the SUW, likely to be relevant to SUW users. We would like to thank those of you who responded for taking the time to participate.

Southern Upland Way User Survey Feedback to businesses along the route

This summary provides you with a brief overview of the findings of the report considered to be of most interest to businesses and covers the following:

- 1 Overall summary.
- 2 Existing market – Who are the users of the SUW? How much time and money do they spend?
- 3 Economic Return – What is the economic benefit to businesses close to SUW? Can this be enhanced?
- 4 How does the route compare to other successful Long Distance Routes, and what can be learnt from this.
- 5 Recommendations for the SUW and in turn potential opportunities for service providers.



1. Overall

The report found overall that the SUW is, at present, underutilised as a Long Distance Route and as a result does not impact significantly on the economy of southern Scotland. It does however have around 1000 people using it as a long distance route, contributing close to £0.5m annually, and has approx 52,600 other users. The SUW has all the attributes required for a successful Long Distance Route: challenge, scenery, good accommodation, good waymarking and a friendly supporting community. Whilst there are a few structural changes required to the route, its main disadvantage is the lack of people currently using it. Users of Long Distance Routes, even those attempting the routes on a budget, can generate significant income for rural locations. The SUW, marketed and promoted appropriately, could be an important contributor to the economy of the south of Scotland.

2. Existing market

The tables opposite show key findings from the survey. To put in context the responses and show how SUW compares to similar routes a comparison to the West Highland Way (WHW) and Wainwrights Coast to Coast (WC2C) is given. A comparison of the positive attributes of all three routes shows the potential for SUW very favourably. The profile of long distance walkers using the Way was found to be:

- Over two thirds are UK residents with most coming from England.
- Most others are from Western Europe, in particular the low countries Netherlands and Belgium.
- Slightly more men than women (56%:44%), with almost half of users walking in pairs
- More than half fall into the 45-65 age range
- The vast majority walk in a west to east direction and spend an average of at least a week on the route

The number of other SUW users, excluding Long Distance Walkers, was estimated at approx 52,600, with the highest proportion using the route for short walks. The majority of these users (97%) come from the UK with 40% living within 30 miles of the route. It is therefore also considered to be an important resource for local residents.

Most Long Distance Walkers spend at least a week in the area. Whole way walkers took an average of 14.6 days to complete the SUW, spending on average £40.74 per person per day, with an average trip cost of £594.80. The majority of total trip spend was on accommodation and luggage transfer services (72.5%), with the remainder spent on meals (including packed lunches and food/drink from local shops), visitor attractions, taxis, crafts, postcards and stamps and telephone calls. The average daily spend was similar for whole way walkers on the West Highland Way and Wainwrights Coast to Coast.

Sectional whole way walkers spent an average duration of 6.6 days on the SUW, spending £37.66 per person per day, an average trip cost of £248.56 (excluding travel to and from the route). Several days walkers spend slightly less time (av. 5.5 days), but spend slightly more per person per day (av. £45.31). Combining all Long Distance Walkers the mean value of SUW as a long distance route was estimated to be in the region of £0.5M per annum. While train was the most popular way to get to the route, cars came a close second. Regardless of the method of travel, the research showed that most walkers want to be comfortable during their endeavours and tend to spend the night in hotels/guesthouses, despite the perception that most stayed in B&Bs or their own tents. Hotels were followed closely by B&Bs, youth hostels and then own accommodation. Around one fifth made use of a tent with a third making use of luggage transfer service. The support offered by good accommodation providers was very highly appreciated in the survey and the friendliness, warm welcomes and services provided over and above the call of duty were clearly highlighted as a positive marketing point for the SUW.

The main sources of information used by Long Distance Walkers were the internet and guidebooks. While other short walk users make more use of local knowledge, maps and Tourist Information Centres.

Nearly half of the walkers undertake other activities while they are in the area, with the following visitor attractions benefiting from SUW walkers stopping off along the route:

- Castle Kennedy Gardens
- Drumlanrig Castle
- Wanlockhead, Lead Mining Museum
- Traquair House
- Melrose Gardens

The Waymarks project was well received by Long Distance Walkers, who thought the Waymarks added to the attraction of the SUW overall.



3. Economic return to businesses

The SUW was considered very important by those businesses along its route, although this importance decreased very quickly further away from the route. Currently, service providers along the route do not see the SUW as having significant economic impact. However, to accommodation providers in close proximity to the route it is very important.

Nearly half of business respondents (44.2%) suggested that the SUW provided no income for their business and 85% thought that the contribution was less than 10%. Some businesses in the accommodation sector however rely almost entirely on the SUW for generating business income. The majority of service providers (58.9%) felt that business attributable to the SUW was static with 21% indicating that it was growing and the remainder declining.

The mean annual income attributable to the SUW was £784.63 but this of course masks a wide range of variability. The figures however betray the perceived importance of the route and perhaps more importantly, the potential of the route as a business opportunity. Businesses surveyed overestimated the number of walkers using the SUW end to end by some 100%, and yet there was still a general consensus that the route is under-utilised by Long Distance Walkers.

The SUW was credited in its ability to bring visitors to the region during the months when the tourism industry in southern Scotland is typically quiet. Walkers help to fill the gap in the tourist season by coming during April and May when business is typically low.

While Long Distance Walkers are spending slightly lower per day than domestic tourists visiting the south of Scotland £37.66/£45.41 v £47.50 per night (VisitScotland, 2003), the average time spent in the region (approx one week) is greater than the overall average for all domestic visitors (3.8 days) and therefore their overall spend is higher by almost a quarter. If walkers were provided with more reasons or opportunities to spend in the area, this may increase further.



4. Comparison

Key findings

	SUW	WHW	WC2C
Average Group size	2.1	2.43	3.31
Average Time on LDR	14.6 days	7.87 days	14.34 days
Average daily spend	£40.74	£43.40	£41.52
Average spend per person	£594.80	£341.55	£595.39
In Full employment	47%	71%	60%
Retired	31%		18%
Age range – by highest % bands	45-64 55-64 35-44	16-24 45-54 35-44	45-54 55-64 35-44
UK residents	68%	75%	75%
Sources of info	Internet Guidebook	Internet Local guidebook	Internet Local guidebook
Use of luggage transfer	37%	56%	66%
Accommodation usage	Hotels/Guesthouses B&B/Farm Youth Hostel/Bunkhouses	Hotel/Guesthouse Youth Hostel/Bunkhouses B&B/Farm	B&B/Farm Youth Hostels/Bunkhouses Hotel/Guesthouse
Additional activities: Photography/Painting Visiting cultural attractions Local history Bird watching	c. 48%	c.67%	c. 52%
Economic value	£0.5M	£4.8M	£5.8M

Positive Attributes

SUW LDWs

Scenery (39)
Weather (14)
Good signage (12)
Good accommodation (9)
Other SUW users
Scenery (101)
Weather (42)
Peace (27)
Wildlife (21)
Good path (15)
Good signage (11)
Challenge (5)

WHW LDWs

Scenery (30)
Weather (14)
Accommodation (10)
Good signage (6)
Wildlife (6)

WC2C LDWs

Scenery (52)
Good accommodation (15)
Weather (13)
Local food (13)
Walk (11)
Meeting people (10)

5. Recommendations & Opportunities

Overall the report has shown that increasing expenditure along the route of the SUW is a matter of increasing the number of users rather than any fundamental infrastructure changes.

■ Create one route manager with overall responsibility for managing, marketing and promotion of the route.
One point of contact for walkers, businesses and visitors focussing on increasing LDWs and return from the SUW.

■ Promote the experience.

- the challenge
- the remoteness
- the undiscovered LDR
- the friendliness
- the variety of landscape

All connected to the SUW can work together to dispel the myths, promote key experiences and encourage more visitors.

■ Improve the end experience.
Introduce new coastal end point which would open economic opportunities for businesses in that chosen point.

■ Develop official passport.
Businesses can participate in marking the passport, increase profile of the business and turn visitors into spend.

■ Maintain and promote Waymarks project.
Increases profile of SUW and visitors.

■ Link communities to SUW.
Introduce circular routes to link the SUW e.g. for Moffat to increase return to businesses in area, provide more retail opportunities for visitors and increase return.

■ Multi-functional sections.
Consider increasing services offered such as mountain biking where appropriate.

■ Promote the route.

- Netherlands, Belgium
- Northern Ireland and Eire
- An increased more user friendly web presence
- More coverage in major walking publications
- Develop an annual event, for example, Great Caledonian Challenge on the WHW

Encourage more visitors to visit and return, recommend to family and friends and development of services for them.

■ Update current SUW information points.
■ More information in the recommended shelters.
■ Develop new guidebook.
■ Develop single route map.
Improve visitor experience and numbers.

■ Develop service provider network.
Encourage service providers to link up perhaps through the web to create more value added services, and perhaps identify missing walkers sooner. Could introduce new services such as a service delivering a private car to the route end which could increase usage.

■ More shelters along the route. Improve waymarking. Improve boggy/muddy path conditions. Smaller sections for the walk.
Improve visitor experience.



6. Conclusions

■ The number of whole route walkers is considerably lower than comparative routes (West Highland Way and Wainwrights Coast to Coast) with the overall economic value currently significantly lower. However, the evidence would suggest that there is considerable scope to increase the number of walkers by implementing some of the recommendations above. Average time and spend is broadly similar, indicating that a substantial uplift in overall economic impact should be achievable.

■ The SUW compares very favourably with other routes and does appear to have all the attributes required of a Long Distance Route, with 90% of SUW users expressing a high satisfaction level for the overall experience.

■ The SUW appeals to the mid to later age ranges (45+), with nearly one third being retired, resulting in higher usage of hotels/guesthouses with B&B/farmhouse accommodation a close second. The user diaries highlighted that walkers want to be comfortable during their endeavours and that good support services are highly desirable and worth paying for.

■ There is no particular difference in the range of additional activities undertaken by SUW users, although there was some

indication that more users would shop if the opportunities were there, particularly for supplies.

■ Walking the SUW in one go is the priority for less than half the users. Marketing the shorter routes and associated accommodation, services and additional activities would therefore appear to be a significant opportunity. Development of shorter, circular routes, linked to population centres, offers the best opportunity for increasing the relevance of the SUW to a wider geographical spread of businesses.

The full Executive Summary from the Southern Upland User Survey is available on the Southern Uplands Partnership website www.sup.org.uk



southern uplands partnership
living land, living community

For further information please contact SUP on 01750 725154 or 01644 420808.

SUW User Services Project Partners: Dumfries & Galloway Council; Scottish Borders Council; South Lanarkshire Council; Scottish National Heritage; Scottish Enterprise; Dumfries & Galloway Tourist Board; Scottish Borders Tourist Board; suw.com; Southern Uplands Partnership.

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