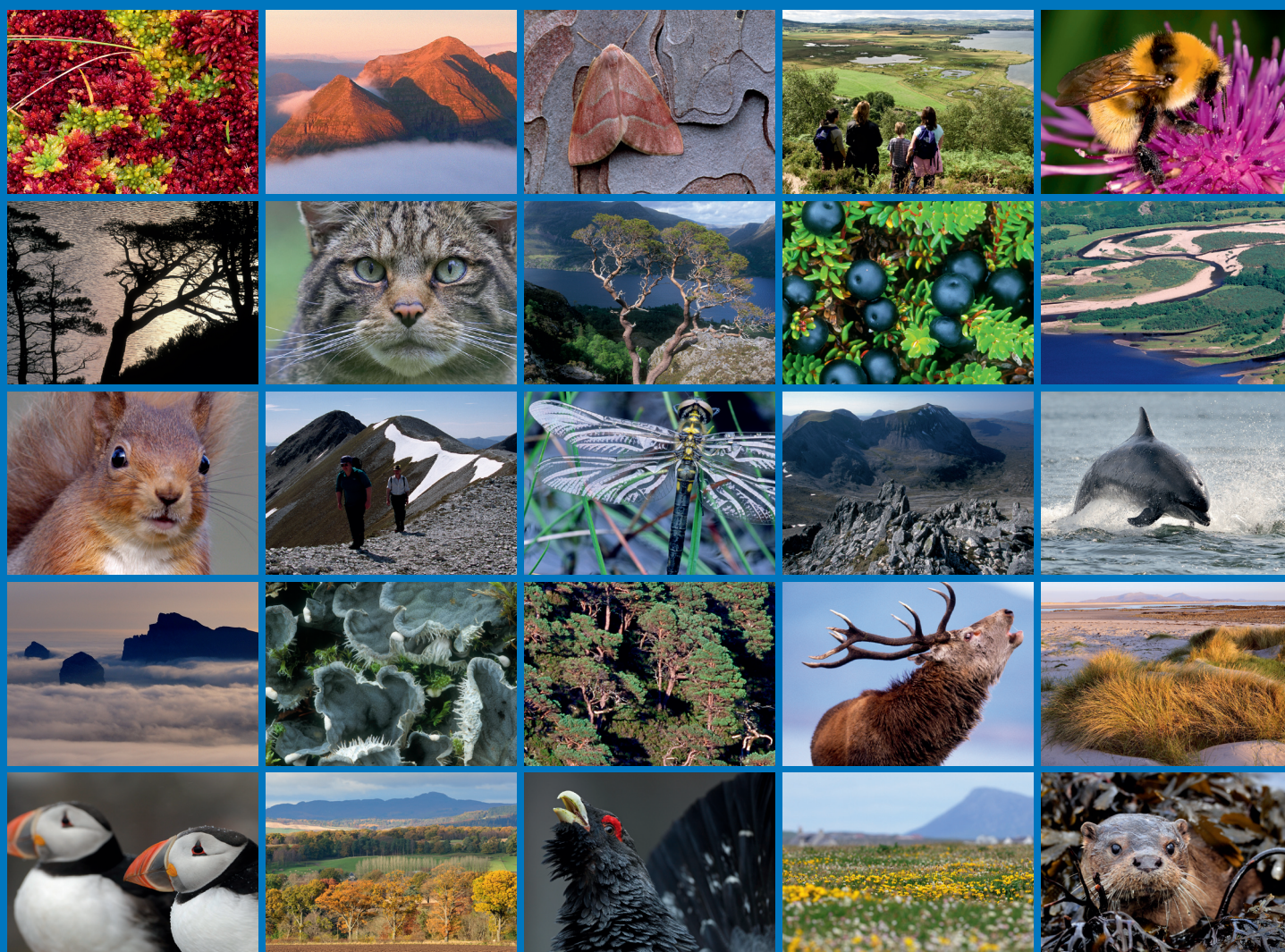


# Potential Tyndrum to Oban path – An assessment of the economic benefits





**Scottish Natural Heritage**  
**Dualchas Nàdair na h-Alba**

All of nature for all of Scotland  
Nàdar air fad airson Alba air fad

# COMMISSIONED REPORT

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## **Commissioned Report No. 519**

### **Potential Tyndrum to Oban path – An assessment of the economic benefits**

For further information on this report please contact:

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*This report should be quoted as:*

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## COMMISSIONED REPORT

# Summary

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## Potential Tyndrum to Oban Path – An assessment of the economic benefits

**Commissioned Report No. 519 (iBids Project No. 012263)**

**Contractor: EKOS and Tourism Resources Company**

**Year of publication: 2012**

### **Background**

Scottish Natural Heritage commissioned this research to provide information on the economic benefits of the potential Tyndrum to Oban recreational route, in terms of underpinning the local economy.

The Tyndrum-Oban Path would run through Dalmally, Lochawe, Taynuilt and Connel. It would be 43 or 47 miles long, depending on which option was chosen for the route at Dalmally.

### **Main findings**

#### Positioning, Branding and Marketing

- the path needs to be positioned as a route of national importance, with a name like “The Way to the Isles” (the name is illustrative at this stage and would be a matter for discussion amongst the stakeholders);
- it would be possible to build on this in the future e.g. on to Mull and Iona;
- strengths of the route include the scenery & landscape, local attractions (and the opportunity for local loops to these), good road and rail connectivity (allowing people to hop on and off the route) and a good range of facilities in the local communities;
- whilst there are some weaknesses these primarily relate to the branding and positioning, and the need to get this right;
- the route would attract a mix of local users, day visitors and overnight visitors including those undertaking the ‘challenge’ of the whole route; and
- the route would require its own website and, initially, print brochures and leaflets. The latter can move to electronic means as the route becomes established.

#### Development Opportunities

- in general the route is well served by local communities in terms of accommodation, convenience retail, cafes, hotels and bars;
- business opportunities, in the main, would be through existing providers adapting or expanding their provision;
- there may be opportunities for the farming community in terms of minor maintenance of the route, servicing visitor needs (B&B, camping, refreshments, produce) and volunteering opportunities (in return for food and accommodation);

- it will be important to develop circular paths and links to key settlements and local visitor attractions to encourage visitors and realise the spend opportunities; and
- more businesses should be encouraged to join the walkers and cyclists welcome schemes.

#### Market Potential and Economic Impact

- the route has the potential to attract 32,000 visitors per annum, of these 81% day and 19% overnight;
- of the 32,000 a total of 3,000 would undertake the whole route;
- the route would potentially create economic activity per annum of £1m at the Local Area level, £1m at the Argyll and Bute level and £0.4m at the Scottish level<sup>1</sup>.

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<sup>1</sup> These are separate calculations at the three levels and should not be added together

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## **Acknowledgements**

We would like to thank Argyll and Bute Council for providing the STEAM data and those individuals that were interviewed as part of the review of other long distance paths for taking part in the study.

## **1. INTRODUCTION**

This report provides an assessment of the potential economic benefits from the proposed development of a path between Tyndrum and Oban.

### **1.1 Background**

SNH were lobbied by members of the local community in Lorn to establish a recreational route between Tyndrum and Oban. In 2008, NACT undertook a survey to identify a route. Their report proposes various options. The report was used as the focus for a public meeting to gauge support for the route. Community Councils, Owner/Occupiers, Argyll & Bute Councillors, Sustrans, FCS and HIE all attended. There were concerns raised but the overall consensus, from all quarters, was that it could bring significant economic benefit to the communities of Dalmally, Awe, Taynuilt, Connel and Oban "Gateway to the Isles" and should be pursued.

### **1.2 Objectives**

Scottish Natural Heritage commissioned this research to provide information as to the development benefits of the proposed Tyndrum to Oban recreational route, in terms of underpinning the local economy.

The assessment provides a:

- study of the likely economic benefits, considering relevant areas, e.g. recreational use, increased accommodation use, return visits, tourism services and facilities, new businesses, promotion of the area, connections to other areas, attraction of events and other developments; and
- clear summary of the economic benefits of the proposed path route and a table of the estimated financial worth of these benefits.

### **1.3 Report Structure**

The remainder of this report is structured as follows:

- Chapter 2 provides an overview of the project and local area;
- Chapter 3 provides an assessment of the market potential;
- Chapter 4 provides an assessment of the potential economic benefits from development of the route; and
- Chapter 5 provides conclusions.

A review of facilities in the towns and villages along the route are given in Annex 1 and a review of other long distance paths in Annex 2.

## **2. THE PROJECT**

### **2.1 Introduction**

In this Chapter we provide a brief description of the project, undertake a review of it as a product and consider its positioning, branding and marketing.

### **2.2 Project Description**

The Tyndrum-Oban Path would run through Dalmally, Lochawe, Taynuilt and Connel. There are two possibilities for route options in the Dalmally area (identified in the North Argyll Community Trust *Oban to Tyndrum Path: A Feasibility Report 2008*):

- South – a line entering Dalmally, when travelling towards Oban, south of the A85; and
- North – a line that follows the north side of the A85 at Inverlochy and turns into Glen Orchy, before entering Dalmally Village centre from the north on the B8077.

The lengths of the path for the two routes are:

- 69km or 43 miles for Dalmally South; or
- 75.5km or 47 miles for Dalmally North.

The path would comprise the following route sections:

- Tyndrum to Dalmally = 20km (13 miles);
- Dalmally to Lochawe = 6km (4 miles);
- Lochawe to Taynuilt = 14km (9 miles);
- Taynuilt to Connel = 15km (10 miles); and
- Connel to Oban = 12km (7miles).

In terms of the current status of the different sections of the route this includes:

- Sections currently on trunk road = 4.8km (3 miles);
- Sections on single-track roads = 7.5km (4.7 miles);
- Existing defined paths/tracks with a constructed surface = 9.5km (5.9 miles);
- Existing line of route but no constructed path = 19.4km (12.1 miles); and
- Sections with no path = 27.8km (17.3 miles).

### **2.3 Product Review**

In this section we consider the product offering that is being proposed. Initially we consider the strengths, weaknesses, market opportunities and gaps. We then consider the positioning, branding and marketing.

#### *Strengths and weaknesses*

We have considered the strengths and weaknesses of the route from a user's perspective. The key strengths include:

- The path will follow a recognised visitor route from Tyndrum to Oban;
- Oban is the Gateway to the Isles and a significant visitor and transport hub;
- The proposed path is connected by rail and road, so it can easily be walked in sections and there is public transport readily available at the start and finish, and along the route;

- The route is well served by local communities, that will create local demand for the route;
- All along the route there is good provision of local stores for supplies, bed and breakfast and other forms of serviced accommodation. Most communities also have a tea room;
- The scenery is varied and dramatic which should create visitor interest;
- Compared with the West Highland Way, the Route will not be perceived as so wild, so it may be preferred by some markets;
- Along the route there are a number of visitor attractions, nature reserves and activity providers, that if marketed together and linked to the route would boost demand and increase the visitor experience; and
- There is the potential to create a short mountain bike loop off the main route using the West Highland Way north of Tyndrum, the current cross- country route through Glen Orchy and the proposed connection back to Tyndrum.

The key weaknesses are:

- The route at present is unknown, with little historical precedents; visitors must be given a reason to use the path;
- As a long distance route, the path may be overshadowed by the West Highland Way, particularly if it is unbranded and just another long distance path;
- The start point at Tyndrum has no real presence as the start of a long distance foot path, it is not a visitor destination, or on the coast, it is currently only a service stop on the A82 (however the same could be said of Mugdock Country Park and the start of the West Highland Way);
- Whilst the foot path would join settlements, it needs linkage to the area's visitor attractions and there needs to be a planned network of circular walks off the main spine route to boost short walk visitors; and
- The local population is not large so repeat visits need to be encouraged; strategic loop sections and links must be developed to help boost local community usage.

### *Market Opportunities*

On the basis of the path being developed for use of both walkers and cyclists there are a number of market opportunities including:

- Walkers:
  - Local resident dog walkers, couples, families, and 'paths to health' initiatives through strong links to local communities and links to network of loops and circular walks;
  - Day visitors from within 20 minutes to two hours drive of the route – walking the route in sections of between 2 and 8 miles;
  - Long distance walkers – walking the route as a challenge and staying overnight;
  - Previous West Highland Way Walkers, doing the next challenge;
  - Walkers using the route and Oban as a walking gateway to the Isles; and
  - General tourists staying in the area and visiting the area's visitor attractions, nature reserves, etc and going for a walk as part of a wider range of activities.
- Cyclists:
  - Long distance mountain bikers, staying overnight;
  - Day mountain bikers, cycling the Tyndrum-Glen Orchy Loop; and
  - Local community and visiting family cyclists around key settlements.
- Events:
  - Possible events – Ironman, Running, and Mountain bike adventure races, etc.

- Horse riding:
  - Local links for horse riding could also be considered, and horse riders should be consulted at the detailed route planning stage. The desired feel of the route and any cost constraints may affect what is taken forward.

### *Product Gaps/Opportunities*

We have undertaken a review of the attractions and facilities on offer along the route. The detailed list of attractions, accommodation, eateries and retail are set out in Annex 1. We did not undertake a review in the case of Oban because it has sufficient facilities to meet all of the requirements of visitors to the trail. Therefore, we have focused on the other locations along the route. This review has been used to identify where potential gaps may exist:

#### Local Businesses:

- In general the route is well served for accommodation, convenience retail, cafes, hotels and bars. There is a need, however, to ensure that hotels and bars serve food in the evenings as there are few restaurants. It is assumed that the cafés and teas shops close around 4.30pm to 5.00pm;
- Once the route has been developed there is a need for the route management team, or Highlands and Island Enterprise to work closely with local businesses, to help maximise the walkers and cyclists welcome and cater for their needs in terms of drying facilities, equipment storage, etc. The number of accommodation providers accredited as part of the formal walkers and cyclists welcome schemes should be increased;
- Although it is unlikely that any outdoor shops along the route would be viable, existing retailers should be encouraged to carry a limited supply of essential supplies i.e. maps, compass, shoe laces, bike chains, inner tubes, tent emergency repair kits, etc.
- The route would benefit from a network of small informal, basic campsites with toilet and washing facilities– there is currently a holiday park at Inverawe, caravan parks at Tyndrum and Connel that take tents. Smaller facilities at Dalmally and Taynuilt may be beneficial. These should be managed, if possible, by existing businesses to ensure sustainability; and
- The wigwams near Tyndrum are an interesting product and more of this type of facility should be developed along the route linked to exiting accommodation provision, if possible (see Mabie Hotel, Dumfries and Galloway).

#### Infrastructure:

One of the key product gaps that has been identified is the need for circular paths and links around key settlements and visitor attractions to help boost the route's visitation and the overall visitor experience.

#### Farming Community:

- The route potentially runs through, or close to, a number of traditionally run family farm businesses. Farm diversification is often hindered due to difficulty in gaining easy access to new markets. The route offers an opportunity to bring a small but steady market to the farm door which can contribute to the farming income. For example though:
  - extra income through running small scale camping sites
  - family run B&B opportunities
  - sale of local produce in stalls
  - refreshments at the farm; traditional Scottish Scones with cream tea
  - bicycle hire

- farms might participate in voluntary work exchange schemes for food and/or accommodation such as HelpX and Wwoof ([www.helpx.net](http://www.helpx.net) and [www.wwoof.org.uk](http://www.wwoof.org.uk)). The volunteers may find it attractive to work their way along the route over a period of time.

– The path will need regular maintenance and, whilst tasks such as surfacing etc would be done by national contract, regular maintenance tasks such removing fallen trees, culvert and drain clearance could be contracted to the farm over whose land the path crosses bringing in additional income.

## **2.4 Positioning and Brand Identity**

### *2.4.1 Lessons from the Benchmarking Review*

We have undertaken a review of other long distance paths. Details on each of the routes are given in Annex 2. The purpose of this review was twofold, to:

- Help inform our calculations on the overall demand for the Tyndrum-Oban Path (set out in Chapter 3); and
- Consider lessons from other locations in terms of their positioning, branding and marketing.

It is extremely important to position the route in the market place once it is understood who the potential users may be. As with any path network or long distance route, the majority of users will be local residents that live within about 15 to 20 minutes drive of the recreation facility.

This is true whether it is a forest attraction (All Forest Survey, 58% of visitors travel less than 6 miles, 77% less than 15 miles and 82% are day visitors) local woodland path network, canal tow path or long distance hill path such as the Pennine or Cleveland Way, where the benchmark research for this project has demonstrated that between 80 and 90% of users are local residents on short walks using part of the route close to towns and villages and easy access points. There are also very few users that actually walk the whole long distance of the footpath in one trip. For the Pennine Way (a total of 268 miles) only around 1.5% of users walk the whole route.

The Cotswold's Way however, attracts a large proportion of tourist visitors 50% (anecdotal estimate) and the Hadrian's Wall Way attracts tourists to the visitor attraction sites such as Housesteads and Chesters Forts along the route. In both these cases, however, only around 10% of users walk the whole length of the path in one trip.

Most of these long distance routes in England have been positioned as trails of national importance and are part of the National Trail Network Brand. The brand signature adopted by the National Trail network is an Acorn. This symbol appears on all literature, the website and on direction and promotional signage. There are a total of 13 trails branded as part of the Network and as a result they are marketed primarily through the National Trail website. In the past, leaflets have been produced and were distributed through local tourist information centres. The brochures were also posted out on request to individuals as required. Natural England monitor and fund the National Trail network but they currently have a ban on all trail promotion and marketing (last 18 months). Previously before the marketing ban, marketing campaigns were channelled through VisitBritain and the VisitEngland Tourist Board network.

The Cotswold Way Conservation Board produces a newsletter and leaflets to supplement marketing activity carried out by the National Trail network. The Hadrian's Wall Way is marketed slightly differently from the other National Trails in that it has set-up a destination management organisation to market the area and not just the pathway.

The Waskerley Way is marketed through council websites, it does not really have a brand identity as it is part of the C2C route and it is marketed through Sustrans – website, maps and leaflets.

The Derwent Valley Heritage Way has developed a brand – The National Heritage Corridor that is a registered trademark of the Derwent Valley Trust. Marketing is done through the Trust Web site and any web links. In the past brochures and leaflets have been produced, but this is no longer the case due to budget and funding cuts.

#### *2.4.2 Proposed Positioning & Brand Identity for Tyndrum-Oban Path*

Based on the lessons learnt from the benchmarking exercise, it is recommended that the Tyndrum to Oban trail creates its own brand identity and is not just viewed as a attractive local 40 to 50 mile walk, that can be done in sections, connected to local attractions and loops to and through villages.

The West Highland Way (WHW) as a nationally important route has created a brand image that encourages users to walk the route in one trip and the reward is to complete the 'challenge'. Events such as the Caledonian Challenge, merchandising and a certificate of completion have helped position the WHW product as an aspirational route that visitors now want to be associated with. This positioning not only helps to attract single visit users but also users who will walk the route in sections.

The consultants consider that the Tyndrum to Oban Path is unlikely to have sufficient presence in its own right to achieve this status. The market positioning of the route will be key to its success. The consultants consider that if it is perceived as only a local route or an alternative to the West Highland Way, it will underperform. It is unlikely that many users will walk (or even cycle) the WHW, and then continue to walk the new coastal path to Oban, then complete the loop back to Tyndrum.

If the route can be positioned as a route of national importance say around the theme of "The Way to the Isles" then user numbers will be boosted, particularly those people who walk the whole length of the route and tourist visitors that want to be associated with the route and walk it in sections. In this report the consultants have considered that such a branding is necessary and the user number projections reflect this. However, if the route from Tyndrum to Oban could be extended in the future to Mull and on to Iona or through to Tobermory, this would boost user numbers even further than the estimates contained later in this report. There are also other opportunities to perhaps use Oban as a gateway for linking to other walking routes on the islands themselves, Col, Tiree, Outer Hebrides, etc.

#### *2.4.3 Marketing*

The consultants are of the opinion that the long distance path needs its own web site to promote the brand, give information about the route in sections– times, distances, services, facilities, OS maps required (see Big Tree Country as a good example of a branded walks website with links to the wider area).

Safety messages and detours should also be possible together with live links for weather forecasts, etc.

As much of the route will be done in sections, there should be information about local loops and walks along the way, links to visitor attractions, local settlements and other potential nodes of visitor and local community access.

In the longer term there may be some potential for merchandising. The website could also be used to promote future merchandising opportunities.

The website should also promote links to the attractions of the wider area. The marketing of the wider destinations along the route should come under the auspices of the local Destination Marketing Organisation – Oban and Lorn Tourism Association - [www.Oban.org](http://www.Oban.org). There should also be links to other websites such as [www.argyllandtheisles.com](http://www.argyllandtheisles.com).

The website should also be used to help promote wildlife, environmental and other messages relevant to the landscape.

In the short term it may be necessary to print brochures and leaflets for the route, particularly before the route gets fully adopted by guidebook publishers. This would allow distribution in local accommodation providers and racking in visitor attractions and tourism information centres to promote short walks linking in with the main route. Consideration should also be given to creating downloadable leaflets and brochures of the whole route and the route in sections. (See 7stanes website as good example).

The 7stanes have created a friends registration system. Friends' registration is free but gives users full access to all the website pages. This is a way for the 7stanes organisation to collect emails and addresses for future electronic distribution of newsletters and other important information. In the future it may also be possible to develop a mobile phone or GPS App for users.

On an ongoing basis, large-scale leaflet and brochure distribution and direct advertising should be avoided. Electronic media should be utilised, wherever possible, and direct marketing can be used as a method when databases have been built.

## **2.5 Summary**

The route has a number of strengths which make it attractive as a development opportunity including the scenery & landscape, local attractions, good road and rail connectivity, and being well served by local communities. Whilst there are some weaknesses, these relate primarily to getting the branding and product positioning right which in the main would address these.

On the basis of the route being developed for both walkers and cyclists there are a number of opportunities including local users, day visitors and overnight visitors undertaking the challenge of the whole route. There may also be an opportunity to develop events.

Overall the Path would be generally well served by the communities along the route. There would be some market opportunities but these would tend to be around existing providers adapting or expanding their provision.

Branding and positioning will be important to the success of the route. If it is just viewed as another local walk then it will underperform. There is a need for it to be positioned as a route of national importance possibly around a theme such as "The Way to the Isles". It would also be possible to build on this in the future e.g. onto Mull and Iona. Indeed for it to be recognised as a key national route would require it to go beyond Tyndrum to Oban.

The route should also have its own website and initially print brochures and leaflets to help establish the route. The latter can then move to electronic marketing materials as the route becomes established.

### 3. MARKET POTENTIAL

#### 3.1 Introduction

In this chapter we undertake an assessment of the potential demand for the route.

#### 3.2 Method

We have considered who may be the users of this route based on the strengths and weakness of the long distance path, the market opportunities for the local population and the likely visitors to the area. In calculating the number of uses, the benchmark information of other trails has been considered. The consultants have also taken account of the links to the West Highland Way and the visitor facilities along the route, including the key visitor node of Oban. In estimating the number of users for the route the consultants have assumed that the route would link Tyndrum with Oban. Future extensions of this route to the Isles (Mull/Iona) and completion of the route north to Fort William have been discussed, but are not part of the users' quantification model at this time.

No primary visitor research was carried out as part of this study, so the basis of quantification has been local population neighbourhood statistics, visitor economic data, Scottish Tourism Economic Activity Monitor (STEAM), The Scottish Recreation Survey (SRS - 2010) annual summary report 2010 – SNH No. 465 and SRS 2010 fact sheet - Walking. Isochrone drive times (as explained in Section 3.3) have been prepared together with population data utilising Microsoft Map Point Software.

#### 3.3 Population Living Along the Route

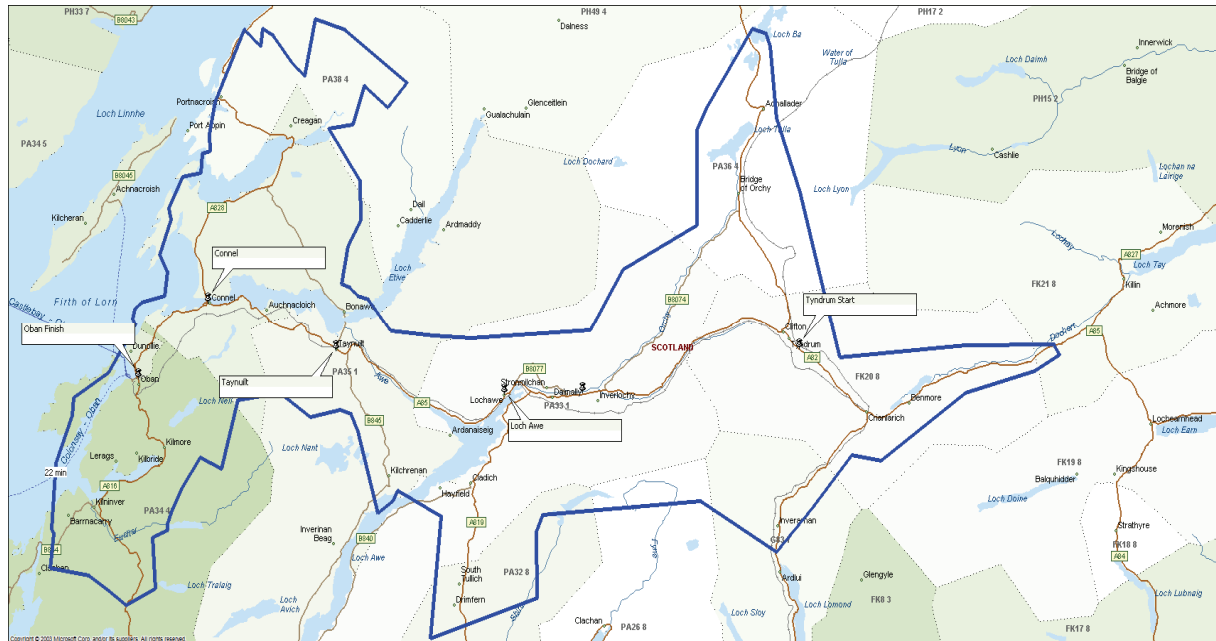
For those local to the route we have set a 20 minute drive time from any point on the route by drawing a 20-minute drive time isochrone using Microsoft Map Point Software. The software calculates the population within the drive time, based on the 2001 population census. The 20-minute drive time has a population of 13,457 people covering the postcodes set out in **Table 3.1**. The way the software works is fairly rudimentary, if the drive time zone drawn includes the geographic postcode centre then the population is included in the data set. If the postcode centre is just outside the drive time, then the population is not included however, this can be overwritten manually by independently extending the drive time nodes. We have adopted this approach where necessary.

*Table 3.1: Postcodes within 20 Minute Drive Time Zones*

Postcodes
PA34 4
PA37 1
PA35 1
PA38 4
PA33 1
PA36 4
FK20 8

Source: Microsoft Map Point Software

Figure 3.1: 20-Minute Drive Time Isochrone

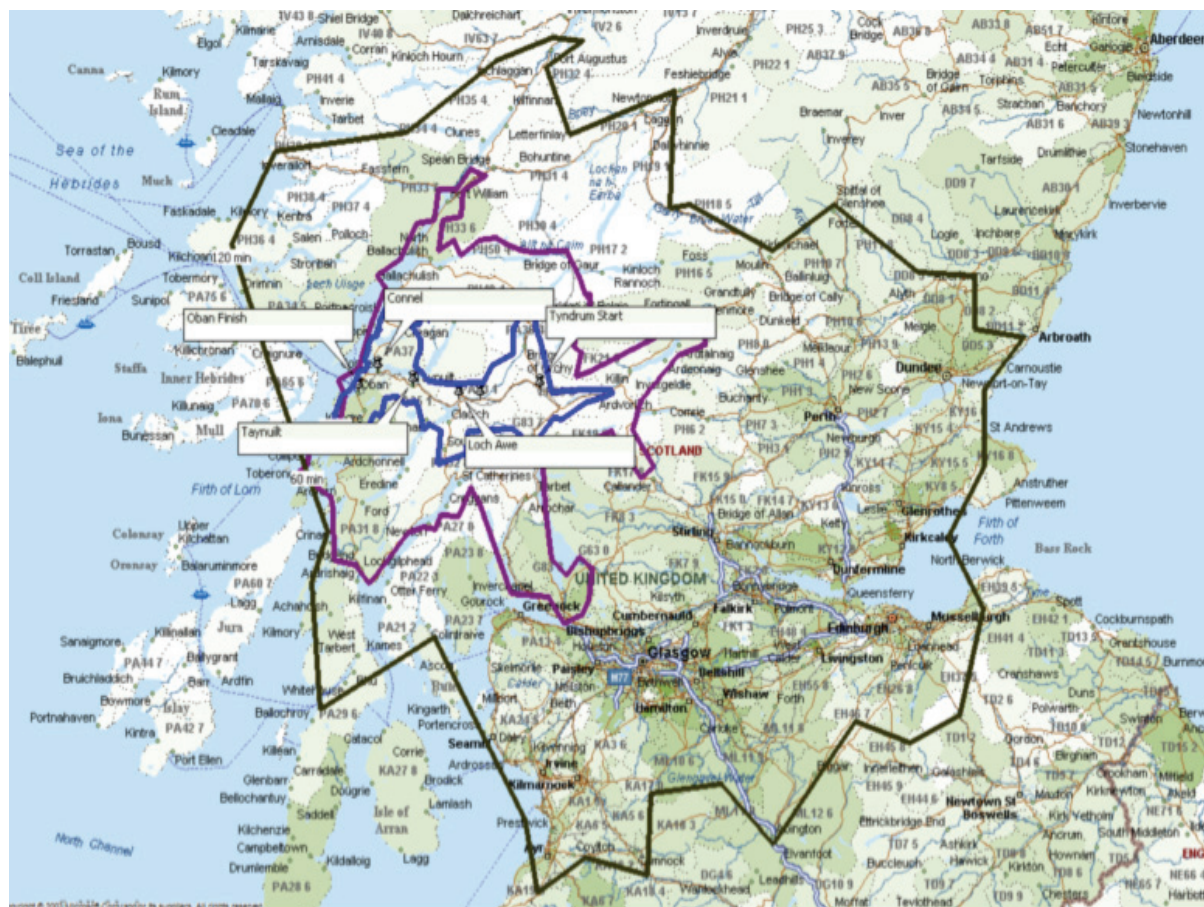


Source: Microsoft Map Point Software

We have checked this against the population for the Government Neighbourhood Population Statistics. The population has been quantified as those people living in datazones were they are approximately 10 miles from any point on the route. Apart from the area to the south of Oban most of the population lives in the settlements along the route, Oban, Tyndrum, Dalmally, Taynuilt, Loch Awe Connel, Dunbeg, etc. The area to the east side of Loch Awe is not really relevant, but cannot be extracted from the Neighbourhood Statistics; however the population is small in any event. The local population using this method is estimated as 12,963 people (10,450 adults and 2,558 children). The two approaches generate reasonably similar results.

As the catchment population using the Map Point Software has been verified with the Local Neighbourhood Statistics we have used it. This then allows for estimates of drive time population, for 20 minutes, 21 to 60 minutes and 61 to 120 minute drive time isochrones. This software uses postcode information and this has then been used in the calculation of economic benefit, (later in Chapter 4) as the source of visitor demand can be determined. The map below demonstrates the wider visitor catchment drive time isochrones.

Figure 3.2: 20, 21-60 and 61 -120-Minute Drive Time Isochrones



Source: Microsoft Map Point Software

The estimated population within the drive time in each drive-time zone is as follows:

Table 3.2: Estimated Population by Drive Time

Drive Time	Total Population	Adults
0-20 minutes	13,457	10,766
21-60 minutes	96,389	77,111
61-120 minutes	3,689,359	2,951,487
Total	3,799,205	3,039,364

Source: Microsoft Map Point Software

### 3.4 Scottish Recreation Survey 2010

In order to understand the demand for recreation, we have analysed the Scottish Recreation Survey 2010 (SRS-2010) and reviewed the walking factsheet in particular. We have applied the statistics and findings from the SRS-2010 to the drive time population catchments. The following statistics has been gleaned from the SRS-2010 survey.

*Table 3.3: Scottish Recreation Survey -2010 Walking Trips*

Proportion of Adults Population Making Trips For Recreation	83%
Average Number of Trips per Person in 4 Week Period	6.6
Average Number of Trips per Person per Year	85.6
Proportion of Walking Trips - Main Activity	71%
Proportion of Walking Trips - Any Activity	80%

Source: SRS-2010

*Note: Mountaineering and hill walking have been excluded as being not totally relevant to the long distance path.*

If the above statistics are applied to the base catchment population in each of the isochrone zones, it is possible to estimate the number of trips made by the adult population for walking as part of a main activity or walking as part of any recreation activity.

*Table 3.4: Estimated Number of Adult Walking Trips by Drive Time*

	0-20 Mins	21-60 Mins	61-120 Mins
Walking Trips Main Activity	544,330	3.9 million	149.2 million
Walking Trips Any Activity	613,329	4.4 million	168.1 million

Source: SRS-2010 & TRC Research

Walking as a main activity is included in the trips for walking as part of any activity. The above is for the adult population only. The survey indicates that approximately 20% of all walking trips include children and as a result this estimate of total adult trips can be increased to calculate all walking trips. For example within the 0 – 20-minute zone all trips where walking was the main activity could be increased to 680,413 trips to include children.

The SRS-2010 survey breaks down walking and recreation trips by where they take place, and by the type of terrain that attracts visitors. The consultants have applied these statistics to each of the drive time zones, but as the demand profile also varies by length of walk, this has also been taken into account. The statistics also vary by whether the visitor is motivated to walk as the main activity or part of other recreation activities. We have used these statistics to create a model to estimate the number of relevant trips taken by the resident population within each drive time zone.

We have assumed that three categories of recreation are most relevant to this model – walking for less than 2 miles, walking for 2 to 8 miles and walking for more than 8 miles. Based on the above categories, we have considered the number of trips where walking is both the main and part of any activity. It is likely that the route may also attract some cyclists and mountain bikers, but this only amounts for between 5-6% of the total recreation demand and there will be some duplication where walking as part of an activity is taken. At this stage we have not complicated the model further by adding in additional cyclists, but we have run the model again using the same methodology and penetration rate for cycling as the main activity and added the result to the walkers' totals.

*Table 3.5: Estimated Number of Adult Walking Trips by Drive Time*

Walking Trips	Less Than 2 Miles	2 to 8 Miles	More Than 8 Miles
% Walking Trips	40.9%	56.3%	2.8%
% In the Countryside	41%	53%	64%
% Who use a Path	74%	80%	80%
% That visit type of Location	22%	35%	45%

Source: SRS-2010

It is interesting to note that only 2.8% of all relevant walking trips are of 8 miles or longer and nearly 57% are between 2 and 8 miles, however, nearly two thirds of the longest walks are in the countryside compared with only 41% of short walks. The research has shown that most people used a path (both signed and unsigned) and usage of a path is marginally greater as walks get longer. We have also considered the type of location to be of relevance. We have excluded local parks, open spaces and beaches as not being relevant to the walking route proposed. The relevant locations include woodland/ forest, rivers, farmland and hillsides as this covers most of the terrain types along the proposed route. As walking distance extends the relevance of the location walked also increases.

We have applied these statistics to the number of walking trips (main activity) in each drive time zone as identified above, which then gives the number of relevant walking trips (main activity) by drive time zone that can be penetrated for the Tyndrum to Oban Path. However in addition to walking as a main activity, the people walking as any activity and children need to be added.

Based on the above model, it is estimated that there is the following number of relevant local resident walking trips to penetrate within the 0 to 20 minute drive time zone.

*Table 3.6: Estimated Number of Relevant Local Resident Walking Trips – 0 to 20 minute Drive Time Zone*

Walking Trips	Less Than 2 Miles	2 to 8 Miles	More Than 8 Miles
No. of Trips Walking Main Activity	14,840	45,509	3,533
Additional Trips Walking Any Activity	1,535	4,045	4317
Additional 20% Children Walking Trips	4,094	12,389	1,963
<b>Total Walking Trips of Relevance</b>	<b>20,469</b>	<b>61,943</b>	<b>9,813</b>

Source: TRC Calculations

Within the 0 to 20 minute zone there are an estimated 92,225 walking trips of relevance, made by the local population each year. Two thirds of these trips are between 2 and 8 miles and only 10% are longer than eight miles. The new Tyndrum to Oban Path would penetrate these local resident trips to attract local users.

We have applied this methodology to the other isochrones, 2 to 8 miles and more than eight miles. This gives the number of trips of relevance in each of the drive time zones that can be penetrated to estimate the number of local resident walkers that will utilise the trail.

*Table 3.7: Estimated Number of Relevant Local Resident Walking Trips All Drive Time Zones*

Drive Time Zones	Less Than 2 Miles	2 to 8 Miles	More Than 8 Miles
0-20 Mins	20,469	61,943	9,813
21-60 Mins	146,616	443,318	70,852
61-120 Mins	5,611,830	16,968,329	2,711,919

Source: TRC Calculations

The table below has been prepared using the cycling fact sheet from the SRS-2010 and applying the same methodology for walking activity. The model has been run again for all cyclists apart from road cyclists (only where cycling is the main activity).

We have taken account of the proportion of all trips that are relevant cycling trips and factored in those taken in the countryside and to the locations like walking that are relevant.

The result gives the number of cycling trips of relevance in each of the drive time zones that can be penetrated to estimate the number of local resident cyclists that will utilise the trail.

*Table 3.8: Estimated Number of Relevant Local Resident Cycling Trips All Drive Time Zones*

Drive Time Zones	Less Than 2 Miles	2 to 10 Miles	More Than 10 Miles
0-20 Mins	858	2,360	2,145
21-60 Mins	6,146	16,902	15,366
61-120 Mins	235,254	646,948	588,134

Source: TRC Calculations

Note: Cycling Trips are 2 to 10 miles and over 10 miles

### 3.5 Market Penetration

The total number of relevant walking and cycling trips has been calculated, and the success of the trail will depend on how well it can penetrate these markets, as theoretically it is in competition with other trail networks across Argyll and Central Scotland. The success of the trail in attracting users will depend on the positioning of the trail and what it has to offer visitors, both in terms of the physical challenge, but more importantly in the visitor experience that is created. Based on the benchmark analysis it has been assumed that the trail will attract a large number of users from the immediate local resident population, mainly on short walks and cycles. Other trail networks can attract up to 85% or 90% of their demand from these sources.

However, the Oban and Tyndrum area also attracts both day and overnight visitors. In the above analysis, day visitors are accounted for through the penetration of the local resident market. Overnight visitors and tourists, however, are considered in the next sub section of this report. We have assumed penetration rates based on the trail from Tyndrum to Oban only, i.e. the proportion of the market that could be attracted to this area. If the trail were to be extended to Mull and the Isles it is likely that the penetration levels would be higher, particularly of the visitor population or visitors doing the whole trail.

*Table 3.9: Assumed Penetration Rate of Relevant Trips*

Drive Time Zones	0-20 Mins	21-60 Mins	61-120 Mins
Less Than 2 Miles	1:5	1:200	1:50,000
2 to 8 Miles	1:7.5	1:50	1:20,000
More Than 8 Miles	1:10	1:100	1:25,000

Source: TRC Assumptions

It has been assumed that people would not travel far to walk or cycle less than two miles. So the penetration of this market is mainly from a very local market. It is envisaged that most people will walk between 2 and 8 miles.

### 3.6 Projected User Numbers Local Residents

Based on the above model the following number of walker and cyclist trail users devolves.

*Table 3.10: Estimated Number of Users by all Drive Time Zones*

Drive Time Zones	0-20 Mins	21-60 Mins	61-120 Mins	Total
Less Than 2 Miles	4,265	764	117	5,146
2 to 8 Miles <sup>1</sup>	8,574	9,204	881	18,659
Over 8 miles <sup>2</sup>	1,196	862	132	2,190
Total	14,035	10,830	1,130	25,995
Percentage	54%	42%	4%	100%

Source: TRC Calculations

<sup>1</sup> 2 to 10 miles for cyclists; <sup>2</sup> Over 10 miles for cyclists

Based on the above, it is estimated that the long distance path from Tyndrum to Oban, could attract approximately 26,000 local resident users. The majority of users, 72%, would walk between 2 and 8 miles and cycle 2 to 10 miles. These users would be day visitors. All the visitors who walk the route end to end would be overnight visitors as well as any tourists that were attracted to walk the route in sections. These markets are discussed in the following subsections of this report.

### **3.7 Projected User Numbers Overnight Tourists**

The Scotland Visitor Survey (2011) outlines that in Argyll and the Isles 40% of holiday visitors go on a longer walk or hike during their holiday. In 2005, a survey carried out by VisitScotland stated that there were around 400,000 trips where walking was the main purpose of the holiday and 4 million trips involved some form of walking. This was equivalent to 40% of holiday visitors to Scotland undertaking some form of walking and 4% where walking was a main holiday.

The survey Cycling Tourism to Scotland (2003), revealed that overnight tourists visit Scotland and undertake recreation activities including cycling. The survey estimated that 8% of all holiday trips to Scotland had cycling as part of a wider range of activities undertaken by tourists in Scotland and 1% had a holiday trip where cycling was the main activity.

We have analysed the Scottish Tourism Economic Activity Monitor (STEAM) data at an Argyll and Bute Council level for 2010. Reference has also been made to the VisitScotland United Kingdom Tourism Survey (UKTS) and the International Passenger Survey (IPS) information for 2009 and 2010 at an Argyll and the Isles, Loch Lomond, Stirling and the Trossachs level in order to get market mix information. STEAM does not record holiday tourists, only all tourist trips. It is estimated that in 2010 there were 1.15million overnight tourist trips in the Argyll and Bute Council area staying in all forms of overnight accommodation including staying with friends and relatives (STEAM 2010).

Of these trips we estimate that 80% were overnight trips (based on UKTS and IPS data for 2009 & 2010) and around 60% were taken within the one-hour drive time zone of the proposed Oban to Tyndrum Path. Thus it can be estimated that there are around 550,000 overnight tourist holiday trips taken by tourists staying within the one-hour drive time zone. By applying the proportion of these trips that involve cycling and walking and then penetrating this potential market, the number of overnight tourists can be calculated as shown below.

Table 3.11: Estimated Tourist Use of Oban to Tyndrum Path

	Low Scenario	High Scenario
No. of Holiday Tourist Trips	553,440	553,440
Proportion that Walk as part of Holiday	40%	40%
No. of Holiday Trips that involve Walking	221,376	221,376
Assumed Penetration Rate	2%	3%
<b>Number of Walking Tourists</b>	<b>4,428</b>	<b>6,621</b>
Proportion that Cycle a part of Holiday	8%	8%
No. of Holiday Trips that involve Cycling	44,275	44,275
Assumed Penetration Rate	1%	2%
<b>Number of Cycling Tourists</b>	<b>443</b>	<b>885</b>
<b>Estimate of Total Overnight Tourist Users</b>	<b>4,870</b>	<b>7,527</b>

Source: TRC Calculations

Based on the above model it is estimated that there is the potential to attract between 5,000 and 7,500 overnight tourists to the route. We have used an average figure of 6,000 users each year to represent overnight tourists.

### 3.8 Summary of Demand

Based on the above, the route would potentially attract an estimated 32,000 users, of which 30,000 would be walkers. It is estimated that 50% of overnight demand would be tourists completing the whole route as part of a single trip i.e. 3,000 people. This is equivalent to around 9% of all users (see benchmarking of other long distance routes). Based on the above a summary of demand devolves as follows:

Table 3.12: Estimated Total Use of Oban to Tyndrum Path

	Number of Users	%
Local Residents 0-20 Minutes	14,035	43.9%
Local Residents 21-60 Minutes	10,830	33.8%
Local Residents 61-120 Minutes	1,130	3.5%
Overnight Tourists	6,000	18.8%
Total Number of Route Users	31,995	100.0%
<b>Say</b>	<b>32,000</b>	
<b>Walkers (rounded)</b>	<b>30,000</b>	<b>93.7%</b>
<b>Cyclists (rounded)</b>	<b>2,000</b>	<b>6.3%</b>
<b>Users Completing Whole Route as Part of One Trip</b>	<b>3,000</b>	<b>9.3%</b>

Note: Local Residents are day visitors

## 4. POTENTIAL ECONOMIC IMPACT

### 4.1 Introduction

This chapter sets out the potential economic impact of developing the route. The economic impact as been assessed at three geographic levels:

- Local Area (20-min drive time);
- Argyll & Bute; and
- Scotland.

### 4.2 Visitor Profile

The total number of potential visitors is estimated at approximately 32,000.

*Table 4.1: Estimated Visitor Numbers*

	Day	Overnight	Total
Local Area (20-Minute Drive)	14,035		14,035
Elsewhere in Argyll & Bute	5,121	53	5,174
Elsewhere in Scotland	6,839	3,067	9,907
Elsewhere in UK	0	1,913	1,913
Overseas	0	967	967
Total	25,995	6,000	31,995

Approximately three fifths of visitors would be from Argyll & Bute. Just under a fifth would be overnight visitors.

*Table 4.2: Visitor Percentages*

	Day	Overnight	Total
Local Area	43.9%	0.0%	43.9%
Elsewhere in Argyll & Bute	16.0%	0.2%	16.2%
Elsewhere in Scotland	21.4%	9.6%	31.0%
Elsewhere in UK	0.0%	6.0%	6.0%
Overseas	0.0%	3.0%	3.0%
Total	81.2%	18.8%	100.0%

We need to subdivide the visitor profile further into visitors to part of the route, whole route walkers and whole route cyclists before calculating economic impact as their visitor behaviour will vary.

*Table 4.3: Visitor Profile*

	Day	Part of Route	Overnight Whole Route Walkers	Overnight Whole Route Cyclists
Local Area	14,035	-	-	-
Elsewhere in Argyll & Bute	5,121	27	24	3
Elsewhere in Scotland	6,839	1,534	1,370	164
Elsewhere in UK	-	956	854	102
Overseas	-	483	432	52
Total	25,995	3,000	2,680	320

### 4.3 Average Daily Expenditure and Length of Stay

The average daily expenditure is set out in **Table 4.4**.

*Table 4.4: Average Daily Spend*

Local Area	Day	Overnight
Local Area	£1	-
Elsewhere in Argyll & Bute	£15	£60
Elsewhere in Scotland	£25	£60
Elsewhere in UK	-	£60
Overseas	-	£70

The day expenditures are based on average daily expenditures. However, in the case of those within a 20-minute drive, we know from the SRS 2010 that the majority of people do not spend anything. Therefore, the average level of spend will be very low for this group.

The overnight expenditures are those for visitors to Argyll and Bute<sup>2</sup> from VisitScotland factsheet for the area. This has been cross checked against data from Progressive (2006), *Investigating and Enhancing the Walking Experience in Scotland*. When we inflate these expenditures to 2011 prices they are similar to our weighted average from the VisitScotland factsheet for the area.

The average length of stay is given in **Table 4.5**.

*Table 4.5: Average Length of Stay*

Part of Route	Length of Stay
Part of Route	0.5
Whole Route Walkers	4
Whole Route Cyclists	2

For those only doing part of the route, on average it will equate to a half day experience for them. Based on the average number of miles likely to be travelled in a day and some potential time at either end the walkers have been estimated at four days and the cyclists two days.

### 4.4 Gross Expenditure

Gross expenditure is calculated as follows:

$$GE = dv.ndv + ov.l.nov$$

Where GE gross expenditure  
 dv average daily expenditure of day visitors  
 ndv number of day visitors  
 ov average daily expenditure of overnight visitors  
 l average length of stay  
 nov number of overnight visitors

<sup>2</sup> Data is for Argyll, Loch Lomond, Stirling and Forth Valley.

Applying the formula gives gross expenditure figures<sup>3</sup> as detailed in the Table below.

*Table 4.6: Gross Expenditure*

	Spend
Local Area	£960,151
Argyll and Bute	£985,756
Scotland	£1,054,147

#### **4.5 Gross to Net**

To calculate the net impact of the facilities it is necessary to take account of:

- deadweight;
- substitution;
- leakage;
- displacement; and
- multiplier effects.

##### *4.5.1 Deadweight*

Deadweight refers to the likelihood that the facilities would be developed without public sector support. As it would not be possible to charge for use of the route there would be no way for a private sector developer to derive an income from it. Rather the benefit derives elsewhere in the local economy (through expenditure on accommodation, food & drink, retail, etc). In these situations the project would not be funded by the private sector due to an externalities market failure, rather it requires public sector intervention.

Without this public sector support the project would not take place, therefore the level of deadweight is zero.

##### *4.5.2 Substitution*

Substitution is a measure of the extent to which an individual or business substitutes one activity for a similar one in order to take advantage of public sector assistance. The public sector funding would be spent directly by the public sector therefore the level of substitution is zero.

##### *4.5.3 Leakage*

Leakage refers to the level of benefits that accrue to those outwith the target area. In this case the assessment is at the Local level (20-minute drive time), Argyll & Bute and Scotland. Any leakage outwith these respective areas would not feature in the calculations i.e. it is implicit within the process and has already been accounted for.

##### *4.5.4 Displacement*

Displacement is an assessment of the extent to which the development will displace economic activity that would have taken place anyway i.e. the extent to which the project has caused spending to be shifted from one part of the local economy to another.

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<sup>3</sup> Expenditure was broken down by visitor origin and type before applying the formula. We have taken account of the fact that some of the expenditure for day visitors may not take place in the local area i.e. fuel

The displacement factors applied are set out in the Table below and vary across the visitor types. The higher displacement for those only using part of the route reflects the fact that most would be likely to do something else in the area otherwise. For those undertaking the whole route they are more likely to be in the area specifically to use the route.

Table 4.7: Displacement Factors (%)

	Local Area	Argyll & Bute	Scotland
<i>Day</i>			
Local Area	90	95	10
Elsewhere in Argyll & Bute	25	95	10
Elsewhere in Scotland	10	15	10
<i>Overnight – Part Route</i>			
Elsewhere in Argyll & Bute	80	100	10
Elsewhere in Scotland	80	90	10
Elsewhere in UK	80	90	10
Overseas	80	90	10
<i>Overnight – Whole Route Walkers and Cyclists</i>			
Elsewhere in Argyll & Bute	0	100	10
Elsewhere in Scotland	0	0	10
Elsewhere in UK	0	10	20
Overseas	0	20	40

Taking account of displacement gives net direct expenditure as set out in **Table 4.8**.

Table 4.8: Net Direct Expenditure

	Spend
Local Area	£850,525
Argyll and Bute	£747,399
Scotland	£250,692

## 4.6 Multipliers

The increase in economic activity as a result of the project will also have two types of wider impact on the economy:

- **supplier effect:** an increase in sales in a business will require it to purchase more supplies than it would have otherwise. A proportion of this 'knock-on' effect will benefit suppliers in the local economy; and
- **income effect:** an increase in sales in a business will usually lead to either an increase in employment or an increase in incomes for those already employed. A proportion of these increased incomes will be re-spent in the local economy.

The multipliers adopted are those from the STMS for a rural area<sup>4</sup>:

- Local Area 1.16;
- Argyll & Bute 1.32; and.
- Scotland 1.57.

<sup>4</sup> The STMS does not provide a multiplier for the Local Area (i.e. 20-min drive time) so we have assumed a similar ratio to that for Argyll & Bute to Scotland (but slightly lower as it is near to the boundary with other areas).

#### 4.7 Net Additional Expenditure

Applying the multipliers gives net additional economic expenditure per year of £0.99m at the Local Area level, £0.99m at the Argyll & Bute level and £0.39m at the Scottish level<sup>5</sup>.

*Table 4.9: Net Additional Expenditure Per Annum*

	Local Area	Argyll & Bute	Scotland
Net Direct	£850,525	£747,399	£250,692
Multipliers	1.16	1.32	1.57
Net Additional	£986,609	£986,567	£393,587

<sup>5</sup> These are separate calculations at the three levels and should not be added together

## **5. CONCLUSIONS**

### **5.1 Introduction**

This chapter provides the conclusions from the study and the estimates of market demand and economic impact.

### **5.2 Background**

The Tyndrum-Oban Path could run through Dalmally, Lochawe, Taynuilt and Connel. There are two possibilities for route options in the Dalmally area:

- South – a line entering Dalmally, when travelling towards Oban, south of the A85; and
- North – a line that follows the north side of the A85 at Inverlochry and turns into Glen Orchy, before entering Dalmally Village centre from the north on the B8077.

The lengths of the path for the two routes are:

- 69km or 43 miles for Dalmally South; or
- 75.5km or 47 miles for Dalmally North.

### **5.3 Positioning, Branding and Marketing**

The positioning and branding of the route will be key to its success. If the route is just viewed as another local route then it will underperform, rather it needs to be positioned as a route of national importance. This will include naming it something other than the Tyndrum to Oban Path for example “The Way to the Isles” (note we are not recommending this as the name at this stage rather suggesting it as example to illustrate the point. The name would be a point for discussion amongst the various stakeholders that would be involved in the project).

It would be possible to build on this in the future e.g. onto Mull and Iona. Indeed for it to be recognised as a key national route would require it to go beyond Tyndrum to Oban. However, for this study we are only concerned with the route from Tyndrum to Oban and therefore the market demand analysis and economic impacts are for this route and not for any sections which may be added later.

The route has a number of strengths as a development opportunity including the scenery & landscape, local attractions (and the opportunity for local loops to these), good road and rail connectivity (allowing people to hop on and off the route at a number of points), and the good range of facilities available in the local communities. Whilst there are some weaknesses these primarily relate to the branding and positioning and the need to get this right.

On the basis of the route being developed for both walkers and cyclists there are a number of opportunities including local users, day visitors and overnight visitors including those undertaking the ‘challenge’ of the whole route. There may be the opportunity to develop events such as Ironman, Running and Mountain Bike adventure races.

The route would require its own website and initially print brochures and leaflets to help establish the route. Once established it will then be possible to move to more electronic marketing materials which will be more cost effective.

## 5.4 Development Opportunities

In general the route is well served by the local communities in terms of accommodation, convenience retail, cafes, hotels and bars. Indeed this is one of the strengths of plans to develop a route in this area. There will be business opportunities but in the main this would be through existing providers adapting or expanding their provision. This would include:

- hotels and bars providing food in the evening,
- existing shops stocking a limited supply of essentials,
- basic campsites with toilet and washing facilities (managed by existing businesses if possible to ensure viability);
- wigwams (linked to existing providers); and
- farmers undertaking minor maintenance on the route, servicing visitor needs e.g. B&B, camping, refreshments, produce and volunteering opportunities (in return for food and accommodation).

It will be important to develop circular paths and links to key settlements and local visitor attractions as this will help ensure the visitor numbers, improve the overall visitor experience and provide people with spending opportunities.

Work should also be undertaken with local accommodation providers to increase the number accredited as part of the walkers and cyclists welcome schemes. This will help the businesses to capture the spend opportunities available but will also make the route more attractive to visitors.

## 5.5 Market Potential

The route would appeal to both a local market (utilising it for recreational activities, dog walking, etc) and by a tourist market (either as part of their overall holiday or the challenge of completing the whole route).

Based on positioning the route as discussed earlier, analysis of the market gives a potential demand for the route of 32,000. Of this 26,000 (81%) would be day visitors. The number of overnight visitors would be 6,000 (19%) of which 3,000 would undertake the whole route.

*Table 5.1: Estimated Tourist Use of Oban to Tyndrum Path*

	Number of Users	%
Local Residents 0-20 Minutes	14,035	43.9%
Local Residents 21-60 Minutes	10,830	33.8%
Local Residents 61-120 Minutes	1,130	3.5%
Overnight Tourists	6,000	18.8%
Total Number of Route Users	31,995	100.0%
<b>Say</b>	<b>32,000</b>	
<b>Walkers (rounded)</b>	<b>30,000</b>	<b>93.7%</b>
<b>Cyclists (rounded)</b>	<b>2,000</b>	<b>6.3%</b>
<b>Users Completing Whole Route as Part of One Trip</b>	<b>3,000</b>	<b>9.3%</b>

## 5.6 Economic Impacts

The economic impact of the route has been assessed at three geographic levels:

- Local Area (within 20-min drive time);
- Argyll and Bute; and
- Scotland.

*Table 5.2: Net Additional Expenditure 10-Year Timeframe<sup>6</sup>*

	Per Annum
Local Area	£1 million
Argyll and Bute	£1 million
Scotland	£0.4 million

The route would generate approximately £1m per annum in net additional expenditure at the Local Area level and Argyll & Bute. It would be £0.4m at the Scottish level.

For this study we have been asked to look at the economic impacts of developing the route. The costs of development have still to be established and the impacts would need to be considered in relation to these at that point.

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<sup>6</sup> These are separate calculations at the three levels and should not be added together

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## ANNEX 1: REVIEW OF FACILITIES ALONG THE ROUTE

Facility	Designation
<b>Oban - Key Visitor Attractions Only</b>	
McCaig's Tower	Visitor Attraction
Arduaine gardens South of Oban	Visitor Attraction
Dunoille Castle - Clan Mcdougall Centre Proposed	Visitor Attraction
Oban Distillery	Visitor Attraction
Oban War and Peace Museum	Visitor Attraction
Oban Station	Transport
<b>Dunstaffnage</b>	
Wide Mouth Frog	Restaurant
Dunstaffnage Castle - Historic Scotland	Visitor Attraction
Marina	Activity Operation
<b>Connel</b>	
Falls of Laura Hotel	Hotel
Ladywell Arms Hotel	Hotel
Oyster Inn	Bar, Rest & Rooms
Ards house	B&B
Achnamara B&B	B&B
Grove House B&B	B&B
Glenstrae B&B	B&B
Greenacre guesthouse	B&B
Mactalla B&B	B&B
Ronebhal Guesthouse	B&B
The Rowans B&B	B&B
Strumhor	B&B
Scotholm B&B	B&B
Loch Etive House B&B	B&B
Achaleven Byre	Self Catering
Antler Cottage	Self Catering
Achnacree Bay Cottages	Self Catering
Boathouse Chalet	Self Catering
Annabells Cottage	Self Catering
Cnocaruan	Self Catering
Dunfuinary Cottage and Boathouse	Self Catering
North Ledaig Caravan Park	Caravan and Camping
Ardchattan Priory & Gardens (6miles)	Visitor Attraction
Oban Airport Connel gliding Club - Oban Air Sports Micro	
lite Training	Activity Operation
Seafreedom Kayaking	Activity Operation
Archery Lessons ( Grove House )	Activity Operation
Ferryman Public House	Public House
Coffee Shop	Café
Village General Store & Post Office	Convenience & Service Retail
Celtic Art	Comparison Retail
Connel Surgery & Pharmacy	Community
Village Hall	Community
Argyll Coastal Route	Tourist Route
Connel Station	Transport
Feornoch Forest	Activity Operation

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**Taynuilt**

The Taynuilt Hotel	Hotel
Cruellas Bed & Breakfast	B&B
Tanglewood Lodge	B&B
Lichen Burn	B&B
Manish	B&B
Inverlorne Self Catering	Self - Catering
Airds Cottage	Self Catering
Airdeny Chalets	Self Catering
Sithean	Self Catering
Kirkton Cottage & Mountain View Chalet	Self Catering
Bonawe House Holiday Cottages	Self Catering
The Old School	Self Catering
Bon Awe Iron Furnace - Historic Scotland	Visitor Attraction
Achnacloich Garden	Visitor Attraction
Barguillan Angus Garden	Visitor Attraction
Loch Etive Cruises	Activity Operation
Fish 'n' Trips - Bonawe	Activity Operation
Taynuilt Golf Club	Activity Operation
Sustrans Route 78	Activity Operation
Loch Visions - Wildlife Photograpy Tours, Courses	Activity Operation
Taynuilt Fishing Club	Activity Operation
Kayaking	Activity Operation
Glen Nant NNR / SSSI	Nature Reserve / Wildlife
Clais Dhearg SSSI (Dragonflies)	Nature Reserve / Wildlife
Robins Nest Tearoom	Café
Tracey's Tearoom	Café/ Tearoom
Bakery	Convenience Retail
Grants - Butchers	Convenience Retail
Grocers	Convenience Retail
Pottery ( Closed ??)	Convenience Retail
Post Office /Newsagents	Service Retail
Hairdressers Salon	Service Retail
Police Station	Community
Masonic Hall	Community
Doctor's Surgery	Community
Children's Play Park	Community
Toilets	Community
Taynuilt Station	Transport
Taychreggan hotel (9 miles)	Hotel
Ardanaiseig Hotel (6 miles)	Hotel
Kilchrennan Inn (8 Miles)	Pub with rooms
Ardanaiseig Woodland Garden	Visitor Attraction
<b>Inverawe (2 miles)</b>	
Inverawe Holiday Cottages	Self Catering
Inverawe Visitor Centre, Smokery, Tearoom, Shop, Nature Trails and Walks	Visitor Attraction / Café / Retail / Activities
Inverawe Fisheries - (part of smoke house) - put and take	Activity Operation

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**Bridge of Awe (2 miles)**

Brander Lodge Hotel & Bistro	Hotel
Tigh an Daraich Lodges	Self Catering
Lochawe Holiday Park	Caravan and Camping
Cruachan - The Hollow Mountain Visitor Centre	Visitor Attraction, Café
Permit Fishing	Activity Operation
Filling Station tea room	Café Tearoom
Garden /centre & coffee shop	Comparison Retail, Café
Dalvallah - Shop office licence	Convenience Retail
Spa Grocers	Convenience Retail
Filling Station	Service Retail, Fishing Permits
Bridge of Awe Station	Transport
Cruachan Station	Transport

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**Loch Awe**

Loch Awe Hotel	Hotel
Tradewinds B&B	B&B
Corriebank	B&B
Railway Cottage	Self Catering
St Conan's Tower	Self Catering
Railway Carriage	Self Catering
Steam Boat Trips Summer Kilchurn Castle to Loch Awe Pier	Visitor Attraction
Kilchurn Castle	Visitor Attraction
Chruachan Dam Walk	Walk
Loch Etive Woods SAC	Nature Reserve / Wildlife
Coille Leitire SSSI	Nature Reserve / Wildlife
	Restaurant, bar, fishing Permits
Tight Line	Convenience Retail, Fishing Permits
Loch Awe Stores	Permits
Church Open to visitors	Community

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**Dalmally**

Glenorchy Lodge Hotel	Hotel
Dalmally Hotel (Highland Heritage)	Hotel (Coaching)
Starthorchy Bed and Breakfast	B&B
Dorie Cullin	B&B
Glenview B&B	B&B
Orchybank Guesthouse	B&B
Inverstrae B&B	B&B
Craig Villa Guesthouse	B&B
Craig Lora	Self Catering
Clyde Cottage	Self Catering
Laganbuidhe	Self Catering
St Conan's Kirk	Visitor Attraction
Dalmally Golf Club	Activity Operation
Strone Hill FCS	Activity Operation
Glen Lochy FCS	Activity Operation
Loch Awe Boats - Boat Hire (3 miles from Dalmally)	Activity Operation
Cairn to Robert the Bruce - Walk	Activity
Duncan Bans Monument	Activity
Golden Eagle SPA	Nature Reserve / Wildlife
Snack Van	Café Tearoom

Highland Critters - Gift Shop	Convenience Retail
Glenview General Store	Convenience Retail
Pharmacy	Service Retail
Post Office	Service Retail
Police Station	Community
Community Centre (Site for sports Hall)	Community
Dalmally Station	Transport
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<b>Tyndrum</b>	
The Ben Doran Hotel (Highland Heritage)	Hotel (Coaching)
Royal Hotel ( Highland Heritage)	Hotel (Coaching)
Tyndrum Lodge Hotel & Paddies Bar and Grill	Hotel, Bar Restaurant
Dackell Cottage	B&B
Glengarry House	B&B
Ewich House	B&B
Strathfillan House B&B	B&B
West Highland Lodge	B&B
The Lodge (Therapies)	B&B
The Old Church	B&B
Burnbrae	Self-Catering
Inverherive	Self-Catering
Aros Beag	Self- Catering
	Self Catering, Caravan
Pinetrees Leisure Park	Camping
Glengarry House Lodge	Self Catering
Glendochart Caravan Park	Camping and Caravanning
Strathfillan Wigwams	Camping, Hostel
West Highland Sleeper	Hostel
By The Way Hostel and Campsite	Hostel
West Highland Way	Activity Operation
Ben Lui Munro and path	Walk
West Highland Way	Walk
Ben Lui National Nature Reserve	Nature Reserve / Wildlife
Real Food Café	Café Tearoom
	Convenience and Comparison
Green Welly Shop, cafe	Retail and Café
General Store Brodies Mini Market	Convenience Retail
TIC	Service Retail
Petrol	Service Retail
Tyndrum upper and Lower Train Stations	Transport
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## ANNEX 2: REVIEW OF LONG DISTANCE PATHS

LONG DISTANCE PATH WAYS COMPARATORS - SUMMARY								
NAME	LOCATION	DISTANCE	TYPE/SUITABILITY	VISITOR NUMBERS	VISITOR PROFILE	BRAND	ATTRACTIONS ON ROUTE	STAGES
<b>West Highland Way</b>	Milngavie – Fort William	96 miles (154 km)	100% for walkers. 90% for cyclists but would be dedicated mountain bikers	33,500 the whole route	Mix of local use for sections and tourists for the whole route. Popular with 40+ age group but anecdotally they feel more younger backpackers have been using it recently	West Highland Way Brand	Glengoyne Distillery' Rob Roy's Cave' Ice Factor (National Ice Climbing Centre)' Mugdock Country Park' Boat trips on Loch Lomond' RSPB Reserve	13
<b>Cleveland Way</b>	Helmsley – Filey Brigg	109 miles (176 km)	100% for walkers, 20% available for cyclists and horse riders too	303,500 per year: 300,000 day visits in a year 1,500 completing end to end 2,000 doing it in stages (couple of days)	Older generation About 80% day/short day users 7/8% overseas tourists 3 way split between locals 30 mile radius, locals 60 mile radius and 100 +	National Trail Acorn	Helmsley Castle, Rievaulx Abbey, Mount Grace Priory, Gisborough Priory, Withby Abbey, Scarborough Castle	10
<b>Pennine Way</b>	Edale – Kirk Yethom	268 miles (429km)	100% for walkers, 30% available for cyclists and horse riders too.	2009 – 200,883 2010 – 164,104 2011 – 151,800 (1,800 full walk 150,000 other users)	Typical visitor white middle aged man Increase in Dutch backpackers (keen walkers in their 20s)	National Trail Acorn	Hadrian's Wall Largest waterfall in England Spectacular gorge Highest mountain in the Pennines	7
<b>Offa's Dyke Path</b>	Sedbury Cliff – Prestatyn Seafront	177 miles (285km)	100% for walkers 35% available for horse riders and cyclists	Unknown	70% tourists – walk the whole length 30% mainly locals – walking the smaller sections	National Trail Acorn	Offa's Dyke, Chepstow Castle, Wye Valley, Tintern Abbey, Monmouth, Black Mountains, Hay-on-Wye (the Town of Books), Knighton, (the Town-on-the-Dyke), Llangollen, Pont-Cysyllte Aqueduct, Moel Famau and the Clwydian Range Hill Forts	12

<b>Cotswold Way</b>	South West England: Chipping Campden – Bath Abbey	102 miles (163km)	100% for walkers, 19% for cyclists and horse riders.	150,000	50% tourists 50% locals 10% long distance and the rest short walks etc	National Trail Acorn	World Heritage City of Bath, Malvern Hills and Forest of Dean. National Trust properties of Dyrham House and Horton Court; Broadway Tower and Somerset Monument tower follies; old mill towns of Painswick, Stroud & Dursley, Devils Chimney at Leckhampton Hill; Belas Knap Long Barrow, Sudeley Castle and Hailes Abbey.	12
<b>Great Glen Way</b>	Inverness – Fort William	79 miles	Walking, Cycling, Canoeing and Kayaking	2008 – 28,512 2009 – 33,476			Great Glen Canoe Trail, Loch Ness	7
<b>Hadrian's Wall Path</b>	Wallsend – Bowness-on-Solway	84 miles (135km)	100% walkers, 14% cyclists	162,000-165,000 Busiest sites 150,000 End to end – 12-15,000	Typically over the age of 40 from all over the UK and abroad Increase in young people on a budget	National Trail Acorn & Hadrian's Wall country brand	Hadrian's Wall, Museums Roman Forts of Segedunum (Wallsend), Chesters, Housesteads, Birdoswald, River Tyne bridges, Whin Sill escarpment; well preserved Roman masonry and earthworks, Solway salt marshes.	
<b>Waskerley Way</b>	Durham: Consett - Stanhope	11 miles	Railway Path Cycling and Walking (part of C2C)	324,000 annual visitors	Long distance users about 25,000 Family walkers and cyclists	N/A	Hownsgill Viaduct towers Beamish Museum Old Railway terminus	5

<b>The Southern Upland Way</b>	Portpatrick - Cockburnspath	212 miles (340 km)	Walking, cycling and Horse Riding (Challenging)	Eastern Section: 2009 – 25,740 2010 – 46,451 2011 (Jan-Aug) – 36,190  (2007 – 87,503 worth £2,782,330)	Large number of locals on the Eastern section	Council 'Its more than a walk...it's an experience to remember'	Melrose Abbey, Abbotsford House	16
<b>Sea to Sea (C2C) Cycle Route</b>	Whitehaven - Sunderland	147 miles	Cycling	12,000 – 15,000 Developing around £12 million a year for the local economy		Developed by Sustrans		
<b>Cumbria Way</b>	Lake District: Ulverston – Carlisle	70 miles (113km)	Walking and Cycling	Unknown	Unknown		Coniston Water Tarn Hows Dungeon Ghyll Dash Falls High Pike Caldew Valley Langdale Pikes –towering peaks	5
<b>The Ridgeway</b>	Overton Hill – Ivinghoe Beacon	87 miles (139km)	100% walkers, partly cyclists and horse riders	Unknown	Unknown	National Trail Acorn	Barbury Castle, Avebury Circle, Ashdown House, Waylands Smithy, Uffington White Horse, Wantage, East Ilsley, Grim's Ditch, Icknield Way, Watlington White Mark, Chaquers, Tring Park,	6

<b>Derwent Valley Heritage Way</b>	Derbyshire River: Ladybower Reservoir – Derwent Mouth	55 miles	Walking and Cycling (Moderate)			The Derwent Valley Trust 'The National Heritage Corridor'	Derwent Valley Mills World Heritage Site	10
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## **WEST HIGHLAND WAY**

**Location:** Outskirts of Glasgow to Fort William in the Highlands.

**Length:** 154 km (96 miles)

**Average number of days to complete:** 6-7

**Use / Type:** Mix of local use for sections and tourist use for whole route.

**Highest point:** The Devil's Staircase (550 m/1,850 ft)

**Start Point:** Milngavie Town Centre

**Finish Point:** Gordon Square in Fort William

**History:** The idea for the West Highland Way was conceived in the 1960s but it was not until 1980 that the way was declared open.

### **ROUTE**

Can be split into 13 sections:

- Milngavie to Carbeth (8 kms/5 miles)
- Carbeth to Drymen (11.2 kms/7 miles)
- Drymen to Balmaha (12.8 kms/8 miles)
- Balmaha to Rowardennan (11.2 kms/7 miles)
- Rowardennan to Inversnaid (11.2 kms/7 miles)
- Inversnaid to Inverarnan (11.2 kms/7 miles)
- Inverarnan to Crianlarich (9.6 kms/6 miles)
- Crianlarich to Tyndrum (9.6 kms/6 miles)
- Tyndrum to Bridge of Orchy (11.2 kms/7 miles)
- Bridge of Orchy to Inveroran (3.2 kms/2 miles)
- Inveroran to Kingshouse (16 kms/10 miles)
- Kingshouse to Kinlochleven (14.4 kms/9 miles)
- Kinlochleven to Fort William (24 kms/16 miles)

### **ATTRACTIONS ON ROUTE**

- Glengoyne Distillery
- Rob Roy's Cave
- Ice Factor (National Ice Climbing Centre)
- Mugdock Country Park

- Boat trips to Inchcailloch on Loch Lomond
- RSPB Reserve

#### Interview – Gordon Forrester

**Visitor Profile** - Popular with 40+ age group but anecdotally feel that more younger backpackers have been using it recently. Not all of the route is really suitable for cyclists. There is a 6-7 mile section around Balmaha-Rowardennan where cyclists have to carry their bike at parts; also people could not cycle up the Devil's Staircase. Those cycling the full route would need to be dedicated mountain bikers. There are parts of the route that are suitable for easier cycling particularly further north.

**Visitor numbers** – 33,500 travelling the whole route

**Marketing** – In many cases the WHW has such a profile that it attracts coverage anyway. For example at least one of the walking publications will mention the WHW during the year. However they do undertake some marketing and the National Park take the lead on this. This has included advertising in publications/newspapers in Scotland and Northern England. They have also used a distribution company for their pocket companions which worked very well so plan to do the same this year. They have a website with key information on the route, accommodation and local attractions.

**Management** – The route is managed by a steering group that comprises the National Park and the four Local Authorities. Each Local Authority takes responsibility for maintaining their particular part of the route. However, they do share knowledge, ideas and resources e.g. machinery, etc. The National Park takes the lead on being the public face of the route e.g. if there are interviews, TV, radio coverage.

**Attractions** – The route comprises a mix of manmade (Glengoyne Distillery, Ice Factor and Boat trips on Loch Lomond) and natural attractions (Loch Lomond National Nature Reserve, RSPB Reserve and waterfalls).

**Future Plans** – Development of a Tyndrum to Oban route would provide the opportunity to develop a cycling loop from Tyndrum-Bridge of Orchy-Dalmally-Tyndrum. It would also allow for a cycle link through Crianlarich to Route 7 on the Sustran Routes.

#### CLEVELAND WAY

**Location:** North Yorkshire.

**Length:** 176km (109 miles).

**Average number of days to complete:** 9.

**Use / Type:** 100% of route available for walkers, 20% available for cyclists and horse riders too.

**Highest point:** Urra Moor 454m (1,489 ft).

**Start point:** The cross in Market Square at Helmsley.

**Finish point:** Filey Brigg, on the coast 11km (7miles) South of Scarborough

**History:** The Cleveland Way was opened in 1969, the second National Trail in England and Wales.

### **ATTRACTIONS ON ROUTE**

- Helmsley Castle
- Reivaulx Abbey
- Mount Grace Priory
- Gisborough Priory
- Whitby Abbey
- Scarborough Castle
- Sutton Bank Visitor Centre

### Interview

Malcolm Hodgson – 01439 770657

**Visitor Profile** - Majority the older generation using the paths (families not so much)

Majority are day / short day trip users – estimated at about 80% of demand

7/8% are overseas tourists and the remainder is UK overnight tourists

3 way split between local residents 30-mile radius, local residents 60 -mile radius and 100 +

Only 20% of the route is available for cyclists / horse riders – not many use the more rural parts, but more cyclists use the available routes nearer the towns/attractions.

**Visitor numbers** – 300,000 day visits in a year to all parts of the route. 1,500 completing end to end in one trip, 2,000 doing it in stages (couple of days per stage).

They haven't had the funding to complete a visitor survey in a number of years, but it is considered that the visitor numbers are fairly static (anecdotally).

**Marketing** – done through National Trail website and leaflet – goes out to Tourist Information Centres (TICs) in the area and is posted out on request and wherever they can find places

English National trail have a ban on promotion but they visit exhibitions e.g. recently went to the Travel Show in Manchester.

Brand – Acorn Logo –being dictated by Natural England

**Management** – National trails and maintenance ranger (on the ground work) and a lot of volunteers – seen a large increase in volunteers in the past few years – about 400 volunteer days in a year  
Erosion issues on route – a quarter of the maintenance costs down to erosion.  
Maintenance is the highest costs – e.g. about a third spent on strimming, mowing, trimming back hedges etc.

**Future plans** – always looking at promotional campaigns, changing all the time,  
e.g. last year started tracker packs to attract more families to the trail (detail of route, games, etc that can be done on route, binoculars, wildlife hunt, etc).

Geocaching – looking for things in the ground – using GPS Receivers  
Trying to grow the family market – tendency to attract older people walking on the trail

**Attractions** – variety, good mix of landscape along the path,  
Heritage along the way – e.g. Scarborough Castle  
A lot of users are visiting the attractions on the route anyway  
Three heritage attractions are actually on the route and a further three, half a mile off the route.

## **PENNINE WAY**

**Location:** Peak District in Derbyshire to the Scottish Borders.

**Length:** 429km (268 miles).

**Average number of days to complete:** 16.

**Use / Type:** 100% available for walkers, 30% available for cyclists and horse riders too.

**Highest point:** Cross Fell 893m (2,947 ft).

**Start point:** The Nags Head pub in Edale.

**Finish point:** The Border Inn, Kirk Yetholm.

**Famous Associations:** Benny Rothman from The Access Movement in the Peak District during the 1930's,

Tom Stephenson, A Wainright, Bronte Family.

**History:** Britain's first national trail – devised by Tom Stephenson in the 1930s  
Now forms part of the European long distance path called the E2

## **ROUTE**

Can be split into 5 sections:

- Hawes to Keld (20km/12.5 miles)
- Keld to Baldersdale (24km/15 miles)
- Baldersdale/Bowes to Langdon Beck (24km/15miles)
- Langden Beck to Dufton (19km/12 miles)
- Dufton to Alston (35km/22 miles)

## **VISITOR NUMERS**

Automatic people counters – National Trail Pennine Way publications:

2009 – 200,883

2010 – 164,104

2011 – 151,800

Interview – Steve Westwood (steve.westwood@naturalengland.org.uk)

**Visitor Profile** – Typical visitor is white middle-aged man, getting a lot more Dutch backpackers (keen walkers in their 20s) and there is an increase in the number of cross-country and long distance running events on the trails.

In 2011, there were 1,800 people walking the full way and 150,000 other users;

The trail goes through 3 National Parks so it gets a lot of day walkers doing part of the trail, etc:

There are very few cyclists and riders – not allowed on parts of the footpath anyway but part of the trail coincides with Pennine Bridal Way so horse riders use this part more.

**Attractions** – mainly landscape e.g. Teesdale High Force (largest waterfall in England), Highcup Nick (spectacular gorge), highest mountain in the Pennines, Hadrian's Wall, etc

Visitors mainly just going for the challenge of the long distance walk and landscape beauty.

**Marketing** – very little at present, only on the national trail website

There has been a ban on marketing by Natural England that has made it more difficult, knock on effect on other suppliers who they use. Previously marketed with Tourist Board, magazines, VisitBritain, England, etc – not allowed to spend money anymore (implemented about 18 months ago)

Brand – acorn logo, national trail (13 national trails)

**Management** – 13 highway authorities in terms of safety, etc

Natural England put in funding for managing. This is the only trail within the national trails network where the officer is employed by Natural England and technically it is not actually a National trail.

**Future** – half way through trail development – looking to move to a more sustainable funding model (going out for consultancy in February 2012)

### **OFFA'S DYKE PATH**

**Location:** England/Wales Border

**Length:** 285km (177 miles).

**Average number of days to complete:** 12.

**Use / Type:** 100% for walkers, 35% available for cyclists and horse riders too.

**Highest point:** Hatterall Ridge 700m (2,300 ft).

**Highlights:** Offa's Dyke, Britain's longest Ancient Monument. Chepstow Castle, Wye Valley, Tintern Abbey, Monmouth, Black Mountains, Hay-on-Wye (the Town of Books), Knighton, (the Town-on-the-Dyke), Llangollen, Pont-Cysyllte Aqueduct, Moel Famau and the Clwydian

Attractions along the route include a range of Hill Forts, wildlife: buzzards, badgers, butterflies and wild flowers.

**Famous Associations:** Kilvert's Diary, Bruce Chatwin "On the Black Hill", Malcolm Saville- "The Lone Pine Adventures", George Borrow - "Wild Wales", A.E. Housman - "A Shropshire Lad".

**History:** Offa's Dyke Path was opened in the summer of 1971, linking Sedbury Cliffs near Chepstow on the banks of the Severn estuary with the coastal town of Prestatyn on the shores of the Irish Sea.

It is named after, and often follows, the spectacular Dyke that King Offa ordered to be constructed in the 8th century, probably to divide his Kingdom of Mercia from rival kingdoms in what is now Wales.

Offa's Dyke is Britain's longest ancient monument.

### **ROUTE**

Whole journey on average takes about 2 weeks, although some people have rumored to complete the trail in 4 days.

The route crosses the England/Wales border numerous times.

- Sedbury Cliffs to Monmouth - 17.5 miles / 28 kilometres
- Monmouth to Pandy - 16.75 miles / 27 kilometres
- Pandy to Hay-on-Wye - 17.5 miles / 28.2 kilometres
- Hay to Kington - 14.75 miles / 23.3 kilometres
- Kington to Knighton – 13.5 miles / 21.7 kilometres

- Knighton to Brompton Crossroads – 15 miles / 24 kilometres
- Brompton Crossroads to Buttington Bridge – 12.25 miles / 20 kilometres
- Buttington Bridge to Llanymynech – 10.5 miles / 17 kilometres
- Llanymynech to Chirk Mill – 14 miles / 22.5 kilometres
- Chirk Mill to Llandegla – 15.5 miles / 25.7 kilometres
- Llandegla to Bodfari – 17.5 miles / 28 kilometres
- Bodfari – Prestatyn – 12 miles / 19 kilometres

## **MAPS**

Official National Trail Guides:

- National Trail Guide. Offa's Dyke Path (Sedbury to Knighton)
- National Trail Guide. Offa's Dyke Path (Knighton to Prestatyn)

Offa's Dyke Association Publications:

- Strip maps for Offa's Dyke Path, (1:25000)
- Route description, North to South (2000)
- Route description, South to North (2000)

Other Guides to Offa's Dyke Path:

- Walking Offa's Dyke Path
- Langton's Guide to Offa's Dyke Path,
- Offa's Dyke Circular Walk
- Offa's Dyke Path
- Offa's Dyke Path
- A Stroll along Offa's Dyke
- A Trailblazer guide
- Special Offa

Interview – Jenny (Offa's Dyke Association)

**Visitor Profile** – majority tourists, 70% walk the whole length, 30% smaller sections, mainly locals going out for walks, etc

**Visitor Numbers** – unsure

**Marketing** – it is a national trail so through their website and also has an association (Offa's Dyke Association who has a website) but have no money for marketing. Mainly done through word of mouth which works out well. Brand – national trail acorn logo and association have a logo – replica coin.

**Attractions** – Dyke, Castles, Canal Bridge, etc

Varied path – accessible

Visitors are motivated to come for both attractions and walking

Trail takes 2 weeks to walk; might split it up in order to complete it.

**Management** – day to day, on the ground management – Rob Dingle, employed by the Council

Rest done by association and national trail organisation. Association has a membership that pays an annual subscription, who they make an annual newsletter for

Also employ a press officer who deals with radio, newspaper etc

The Offas Dyke Association Committee are all volunteers.

**Future plans** – replacing styles with gates where it is feasible

Distant future – move the path off the Dyke to preserve it in the long run (difficult to do though).

## **THE COTSWOLD WAY**

**Location:** between the market town of Chipping Campden in the north and the city of Bath in the south.

**Length:** 102 miles (164 km) long and runs for most of its length on the Cotswold escarpment.

**Use / Type:** 100% for walkers, 19% for cyclists and horse riders

**Highest point:** Cleeve Common 317m (1,040ft).

**Average number of days to complete:** 7.

**Start point:** Market Hall, Chipping Campden.

**Finish point:** Bath Abbey, 10 minutes walk from Bath train station.

**Highlights:** World Heritage City of Bath, views over River Severn to Brecon Beacons in Wales, Malvern Hills and Forest of Dean. National Trust properties of Dyrham House and Horton Court; Broadway Tower and Somerset Monument tower follies; old mill towns of Painswick, Stroud & Dursley, Devils Chimney at Leckhampton Hill; Belas Knap Long Barrow, Sudeley Castle and Hailes Abbey.

Cotswolds Discovery Centre opened in July 2010 - receiving more than 2,000 visitors

## **ROUTE**

Not just a long distance path – also has 12 short walks to choose from:

- Chipping Campden (4.5 miles)
- Broadway and the Tower (4 miles)
- Stanton, Snowhill and the Edge (6 miles)
- Sinchcombe and Belas Knap (4.25 miles)
- The Cleeve hill Ring (6 miles)
- The Leckhampton Loop (4.5 miles)
- Cranham Coopers and the Beechwoods (4 miles)
- The Selsley Circuit (5 miles)
- Cam Long Down and Uley (4 miles)
- Wotton-under-Edge (5 miles)
- Old Sodbury – The Hill Fort and Church (2.5 miles)
- Journey's End – The Walk into Bath (6 miles)

Interview – James Blockley

**Visitor Numbers** – 150,000 a year

**Visitor Profile** – 10% long distance and the rest short walks etc, 50% tourists and 50% locals.

**Marketing** – Natural England have a freeze on publicity so mainly marketing through national trail website, and newsletters and leaflets funded by Cotswolds Way itself.

National trail acorn brand

**Attractions** – scenery, large number of attractions, main towns, etc along the way but visitors mainly come for the landscape e.g. limestone grasslands being one of the main attractions.

**Management** – Cotswolds Conservation Board employs those managing the pathway.

Have 25 dedicated volunteers

350 volunteers in Cotswolds, all part of Area of Outstanding Natural Beauty (AONB)

The four highway authorities along the route carry out maintenance of the Trail, and they fund this in partnership with Natural England.

**Future plans** – running a pilot to integrate management with the AONB

### **HADRIAN'S WALL WAY**

**Location:** North England - Cumbria, Northumberland and Tyneside.

**Length:** 135km (84miles).

**Average number of days to complete:** 7.

**Users:** Walkers only in Cumbria & Northumberland. Within Tyneside 19 km - (14% of the total route) is shared with cyclists on an urban cycleway.

**Highest point:** Whinshields Crag 345m (1,130 ft).

**Start point:** Segedunum Roman Fort at Wallsend, Tyne and Wear.

**Finish point:** The Banks Promenade, Bowness-on-Solway village on the west coast

**Highlights:** Roman Forts of Segedunum (Wallsend), Chesters, Housesteads, Birdoswald, River Tyne bridges, Whin Sill escarpment; well preserved Roman masonry and earthworks, Solway salt marshes.

### **MAPS**

Ordnance Survey Maps:

- Explorer Map 316 Newcastle
- Explorer OL43 Hadrian's Wall
- Explorer Map 315 Carlisle
- Explorer Map 314 Solway Firth

### **ROUTE**

- Wallsend to Heddon-on-the-Wall
- Heddon-on-the-Wall to Chollerford
- Chollerford to Steel Rigg
- Steel Rigg to Walton
- Walton to Carlisle
- Carlisle to Bowness-on-Solway

## Interview – David McGlade

**Visitor Numbers** – busiest site will attract 150,000 (top 2 sites), end to end long distance (1 week) – 12,000-15,000

**Visitor Profile** – majority are tourists from all over UK and abroad. Typically over the age of 40. Seeing an increase of young people on a budget, which is also shown with the growth in campsites along the way.

**Marketing** – own website and natural England / national trail website

Hadrian's Wall managed differently to others, by not for profit organisation – Hadrian's Wall Heritage (DMO) – markets the region, not just the pathway

Principally marketing is done through the national trail

Brand – national trail acorn and Hadrian's Wall country have website of their own

**Management** – day-to-day and strategic management done by Hadrian's Wall Heritage but ultimately paid for by Natural England.

90% of the route overlies an ancient monument so their underpinning aim is to protect the path surface (green path) – therefore they do not promote the path in winter and operate it on a voluntary basis. Visitors are educated not to use the path in winter – marketing with a difference

60 volunteers

**Attractions** – ancient monument is a large reason for visiting, people interested in the archeology side of things, but the majority of visitors come as it is a pleasant safe walk with a high quality landscape – they are hooked by the idea of the ancient monument (many of them wouldn't know it if they walked over it) but come for the landscape

4 museums/attractions on the wall itself and a couple off by a mile and a half

Some make the effort to visit these attractions

**Future plans** – improve management

Last couple of months there has been an increase in runners on the path, had some half marathons but they feel it's not the right activity to have on their path and need to come up with new solutions

## WASKERLEY WAY

**Location:** Durham

**Length:** 11 miles

**Start Point:** Consett

**Finish Point:** Stanhope

Contact number – 0191 372 9100

This 11 mile path is part of the C2C Route – starting from West Cumbria and finishing in Tynemouth and is 147 miles long

The Sea to Sea (C2C) cycle route was developed by Sustrans in partnership with various Local Authorities, Groundwork West Cumbria, North Pennines Tourism Partnership, Forest Enterprise and the Lake District National Park amongst others. The route was opened in 1994 running from Whitehaven on the west coast of Cumbria to the North East coast at Sunderland, and has an average of between 12,000 and 15,000 cyclists completing the route every year (and literally hundreds of thousands of other doing shorter sections). According to Sustrans this is developing around £12 million a year for the local economy.

Highest point – over 2,000 feet

#### **MAPS**

Maps available – Ordnance Survey Explorer 307

#### **ROUTE**

Entrances:

- Park Head
- Hawkburn Head
- Waskerley Station
- Whitehall
- Rowley
- Lydgetts Junction

Interview – Dave Liddle

**Visitor Number** – 324,000 (more of a “guestimate”, as people only walk parts of it)

**Visitor profile** – Long distance users, mostly travelling the whole C2C route – about 25,000. Family walkers and cyclists

**Marketing** – County Council website, leaflets, Sustrans (C2C), tourist information centres, etc. No brand associated with it

**Management** – County Council Sports and Leisure. Joins onto other pathways, only responsible for 11 miles. Joins onto Lanchester Valley, Derwent Walk, Sustrans – head for Sunderland

**Attractions** – mainly only cafés and accommodation. At the end of the Waskerley Way it joins onto an old railway terminus that splits three ways. Don't really visit for the visitor attractions, cyclists just want to cycle. Sculptures along the way involved with Sustrans

**Future plans** – can't really do much, going good as it is, part of different routes so no plans

### **SEA TO SEA (C2C) CYCLE ROUTE**

No visitor Information available at the time of research.

C2C starting from West Cumbria and finishing in Tynemouth and is 147 miles long

The Sea to Sea (C2C) cycle route was developed by Sustrans in partnership with various Local Authorities, Groundwork West Cumbria, North Pennines Tourism Partnership, Forest Enterprise and the Lake District National Park amongst others. The route was opened in 1994 running from Whitehaven on the west coast of Cumbria to the North East coast at Sunderland, and has an average of between 12,000 and 15,000 cyclists completing the route every year (and literally hundreds of thousands of other doing shorter sections). According to Sustrans this is developing around £12 million a year for the local economy.

Highest point - over 2,000 feet

The route is made up of approximately....

Main Roads – mainly short sections through urban areas – 4%

Minor Roads - quiet, country roads – 50%

Cyclepaths/Off Road – disused railway lines etc – 46%

For the more ambitious cyclist, the C2C can easily be combined with Hadrian's Cycleway or the Reivers route to produce the stunning 310-mile Reivers/C2C round trip.

## **THE SOUTHERN UPLAND WAY**

The Southern Upland Way was Britain's first official coast to coast long distance footpath. It runs 212 miles (340 km) from Portpatrick on the south west coast of Scotland to Cockburnspath on the eastern seaboard.

Its split into two sections – Western Section and Eastern Section:

Western Section - Portpatrick to Etrick Head (east of Beattock at NT 172064)  
Dumfries and Galloway Council Ranger Service

Eastern Section - Etrick Head to Cockburnspath  
Scottish Borders Council Access and Countryside

There are no summits above 3,000ft (914m), but over 80 hills above 2,000ft (610m), offering some fine hill walking.

People normally take about 12 to 16 days to complete the route in one journey but the route can easily be broken down into two trips, from Portpatrick to Beattock to Moffat in 6-8 days and Moffat to Cockburnspath in 6-8 days.

The Southern Upland Way is waymarked throughout its length using the standard thistle symbol.

Much of the route forms part of European Path E2.

- Total planned length: Galway - Nice 4,850km/3,030 miles
- British section: Stranraer - Harwich or Dover 2,297km/1,436 miles total

**Visitor Numbers** - For the Western section of the SUW, the total figure for walkers counted in 2007 was 36,478, and for 2008 an estimated 64,767. Calculation methods were similar for the Eastern section; estimated figures for 2008 gave a total of 54,005 visitors: this is an increase of 6% over 2007, and gives a total for the entire walk including the west of 118,772 walkers. In 2007 figures from counters on the entire SUW gave a total of 87,503, worth £2,782,330 (rough estimate based on visitor spends). If the SUW project, especially the website, successfully draws in more walkers then it could be worth millions of pounds to the region.

**Marketing** - In October 2006, a development officer was appointed to spearhead the Southern Upland Way Project, a major promotional and branding drive underwritten jointly by Scottish Borders Council, Dumfries and Galloway Council and Scottish Natural Heritage, with match funding of £68,000 from the European Regional Development Fund. Non-funding partners included the national tourism promotion agency VisitScotland.

Marketing should be more targeted in terms of geographic region and directed towards known areas of tourist supply, like the North of England and Glasgow.

Similarly, countries keen on walking such as the Netherlands, Belgium and Germany should have a dedicated campaign. The partnership between VisitScotland, which has great marketing expertise and provides a prime medium for advertising the SUW, needs to be consolidated.

### **MAPS**

Ordnance Survey, Explorer Maps:

- 309 Stranraer and The Rhinns
- 310 Glenluce and Kirkcowan
- 318 Galloway Forest Park North
- 319 Galloway Forest Park South
- 320 Castle Douglas, Loch Ken and New Galloway
- 322 Annandale, Annan, Lockerbie & Beattock
- 328 Sanquhar and New Cumnock
- 329 Lowtherhills, Sanquhar and Leadhills
- 330 Moffat and St Mary's Loch
- 337 Peebles and Innerleithen
- 338 Galashiels, Selkirk and Melrose
- 34 Lammermuir Hills
- 346 Berwick upon Tweed

### **Ordnance Survey, Landranger Maps:**

- 82 Stranraer & Glenluce
- 76 Girvan
- 77 Dalmellington & New Galloway Forest Park
- 78 Nithsdale & Annandale: Sanquhar and Moffat
- 79 Hawick & Eskdale
- 73 Peebles, Galashiels and Selkirk: Tweed Valley
- 74 Kelso and Coldstream: Jedburgh and Duns
- 67 Duns Dunbar and Eyemouth

Interview (Eastern Section):

**Visitor Profile** – very varied, depending on sections etc, from enthusiasts who walk the whole route to local dog walkers only using smaller paths

4 counters on the eastern route lowest counter figure 2,210 in 2010

**Marketing** – mainly website marketing, not much else done just now, accommodation leaflets and leaflet can be downloaded from the website

No brand as such – just one of Scotland’s greatest trails

**Managed** – Local authorities – Dumfries and Galloway Council manage the Western Section and Scottish Borders Council manage the Easter Section

**Attractions** - Main attractions on the route – Melrose Abbey, Abbotford House

Majority of visitors just going for the walking, remote aspect of the trail, not to visit attractions

**Future** – no future developments –low resources both financially and time-wise.

Promotional campaign started – coins put on the route for visitors to find which worked very well, got positive feedback so hope to carry it on.

## **GREAT GLEN WAY**

The route, which spans 79 miles/127km between Fort William and Inverness, can be walked in 5-6 days, staying overnight in the various communities within the Glen.

H.R.H. Prince Andrew, Earl of Inverness, officially opened the Great Glen Way on the 30th of April 2002.

The Great Glen is suitable for walkers, cyclists and can also be travelled by boat, canoe or kayak and can be travelled in either direction.

## **ROUTE**

There is a range of different routes that you can take along the way. All depending how long you want to take, how many stops, etc you want to make.

The route is split into 7 sections, and these seven sections are also split further for smaller routes:

- Old Fort, Fort William – Gairloch Locks (10.587 miles)
- Gairloch Locks – Kilfinnan Forestry Gate (12.837 miles)
- Kilfinnan Forestry Gate – Aberchalder Gate (8.435 miles)
- (Kilfinnan (-A82) – Fort Augustus Fingerpost (12.136 miles))
- Fort Augustus Fingerpost – Invermoriston Bridge (9.206 miles)
- Invermoriston Bridge – Lewiston Bridge (14.297 miles)
- Lewiston Bridge – Inverness Castle (19.884 miles)

The Invergarry Link offers an alternative route for people wishing to travel between Kilfinnan (by Laggan Locks) and Aberchalder. The Link is more varied in terms of path surface and gradient than the path on the other side of Loch Oich, and is very scenic with excellent views over the loch. The link is 8.4 miles (13.6km) long, is waymarked and is illustrated on commercial maps.

#### **ATTRACTIONS ON ROUTE**

- Loch Ness
- Inverlochy Castle (1280)
- Old Drovers' Road (18-19th C)
- Leachkin Cairn (2-000 BC)
- Divach Falls (30m drop)
- Old Ballachulish Ferry
- Achnacarry / Clunes Forest
- Wade's Military Roads
- Well of Seven Heads
- Invergarry Castle
- Cherry Island (Iron Age)
- Horse-shoe Crag
- River Moriston Folly

#### **Great Glen Canoe Trail**

The Great Glen is also a famous canoe trail. The Canoe trail project began in January 2010 and is due to be completed by March 2012. Single day paddles and multi-day options are also available including:

- Neptune's Staircase to South Laggan
- South Laggan to Fort Augustus
- Fort Augustus to Inverness

The Great Glen Canoe Trail follows the 60 miles of the Caledonian Canal from Corpach (Fort William) in the west to Clachnaharry (Inverness) in the east.

This trail distance can generally be covered comfortably in an open canoe over five days. If you are paddling a sea kayak, you are likely to be able to do this in three to four days.

Approx 4,000 paddlers took on Scotland's first formal Canoe Trail in 2010 and that figure will surely rise with the new infrastructure complete.

The four main funding partners were able to raise £331,800 (British Waterways Scotland £150,000, Highland Council £100,000, Scottish Natural Heritage £71,800 & Forestry Commission Scotland £10,000) with £270,000 being match funded by European Regional Development Funding making a grand total of £601,800.

The Scottish Canoe Association as the governing body for the sport were also invited to join the Great Glen Canoe Trail Partnership in 2009 and have been actively involved in the decision making process and assisting in the planning with the long term management and running of the trail.

Places to visit:

- Caledonian Canal Visitor Centre
- Cruise Loch Ness
- Culloden Battlefield, Eden Court, Falls of Foyers, Fiver Moriston, Jacobite, Loch Ness Centre & Exhibition, Moray Firth Dolphins, Neptunes Staircase, Pepperpot Lighthouses & Urquhart Castle

### **THE RIDGEWAY**

'Britain's Oldest Road' – 87 miles (138km) long

Walkers can enjoy the whole of The Ridgeway and cyclists and horse riders considerable lengths – all of the 43 miles (69km) of the western half from Overton Hill to the River Thames at Streatley and some stretches east of the river in the Chilterns.

Recreational vehicles such as motorcycles and 4 by 4s can legally use about 16 miles (26km) of the western half of The Ridgeway, mainly from May to the end of September each year (one 2 mile stretch can be used all year round).

## **ROUTES**

The Ridgeway passes through two distinctive landscapes; the open downland of the west within the North Wessex Downs Area of Outstanding Natural Beauty and the more gentle and wooded countryside of the Chilterns Area of Outstanding Natural Beauty in the east.

- Section 1 – Overton Hill to Ogbourne St George
- Section 2 – Ogbourne St George to Sparsholt Firs
- Section 3 – Sparsholt Firs to Streatley
- Section 4 – Streatley to Watlington
- Section 5 – Watlington to Wendover
- Section 6 – Wendover to Ivinghoe Beacon

## **ATTRACTIONS ON ROUTE**

- Avebury World Heritage Site
- Alexander Keiller Museum
- Barbury Castle (Iron Age Fort) Country Park
- Science Museum Wroughton
- Liddington Castle Iron Age Fort
- Wanborough Herb Garden
- Wayland's Smithy
- Uffington White Horse and Castle
- Tom Brown's School Museum
- Hendred Vineyard
- Priory Cottages (owned by National Trust)
- Didcot Railway Centre
- Wallingford Museum & Castle
- Nuffield Place
- Watlington Hill and White Mark
- Chinnor and Princes Risborough Railway

- Bacombe Hill Local Nature Reserve
- Natural History Museum, Tring
- Grand Union Canal
- Pitstone Green Museum
- Pitstone Windmill
- Ford End Watermill
- Ivinghoe Beacon and Ashridge Estate

## **MAPS**

There is a selection of maps available for the route, both of the whole route itself and its sections. Maps can also be downloaded online, whole map or split into six sections.

Harveys Ridgeway Map – entire route (1:40,000 scale)

Ridgeway Memory Map (1:25,000 scale)

Cassini Historical Maps

**Management** - The Ridgeway and Thames Path National Trails are managed together by a joint Management Group composed of senior officers of each of the highway authorities through whose areas the Trails pass, Natural England, the Environment Agency and Tourism South East.

A small team of staff based within Oxfordshire County Council undertakes the day to day management of The Ridgeway in conjunction with the highway authorities and other partners. Volunteers, managed by the team, carry out maintenance of much of the route.

The Ridgeway passes through the following highway authorities areas:

- Wiltshire Council
- Swindon Borough Council
- Oxfordshire County Council
- West Berkshire Council
- Buckinghamshire County Council
- Hertfordshire County Council

## **CUMBRIA WAY**

**Tel:** 01229 587120 (Ulverston tourist information)

Cumbria Way is a 74-mile route through the heart of the Lake District National Park

Ulverston to Carlisle

It was created by members of the Ramblers Association, inspired by the creation of Cumbria as a County in 1974.

Grade: Medium

Majority of the way is sign posted

## **ROUTE**

It normal takes about 6 to 7 days to complete this walk; the following programme is a recommended schedule to undertake.

**Day 1** Ulverston to Coniston - 15 miles

**Day 2** Coniston to Langdale - 11 miles.

**Day 3** Langdale to Rosthwaite - 9 miles.

**Day 4** Rosthwaite to Keswick - 8 miles

**Day 5** Keswick to Caldbeck - 14 miles

**Day 6** Caldbeck to Carlisle - 14 miles.

## **ATTRACTIONS ON ROUTE**

- Coniston Water
- Tarn Hows
- Dungeon Ghyll
- Dash Falls
- High Pike
- Caldew Valley
- Langdale Pikes –towering peaks
- St Bega church on the shores of Bassenthwaite Lake
- Tullie House Museum
- Carlisle Cathedral
- Guildhall – local history museum
- Medieval Castle

Climb Scafell Pike which at 978m is England's highest peak.  
Coniston is a lovely town and is famous for being the site of Donald Campbell's ill fated world record water speed attempt.  
Stake Pass, at 480m the highest point on the Cumbria Way  
Hill Top – 17<sup>th</sup> Century Cottage – BeatrixPotter (in Hawkshead)

## **MAPS**

Ordnance Survey Maps (path is named on OS maps):

OS Landranger: 85, 89, 90, 96, 97

OS Landranger Active: 89, 90, 96, 97

OS Explorer: 4, 5, 6, 7, 315

OS Explorer Active: 4, 5, 6, 7, 315

Other Paper Maps:

Harvey Map (Stripmap): Cumbria Way (Harvey Maps - 2009)

Digital Maps:

Downloadable Digital Mapping: Cumbria Way (Anquet Maps - 2009)

Digital Mapping (25k Scale): MEMORY-MAP V5 LAKE DISTRICT OS 1:25,000 (Memory-Map Europe)

Cumbria Way Cycle Route loosely follows the Cumbria Way walk route  
Over 72 miles long (80 miles if you use the 2 off-road sections)

## **DERWENT VALLEY HERITAGE WAY**

The Derwent Valley Trust has developed the Derwent Valley Heritage Way. The Trust was established to secure recognition of the valley as The National Heritage Corridor to promote its landscape, wildlife and heritage in a sustainable way. The Trust works through partnerships with organisations that share its vision including local authorities, the Peak District National Park, local businesses and societies. The number of visitors is not known, but most are dog walkers, walking small sections. There are visitors that walk the whole way in 3 or 4 days.

The route is waymarked with Purple discs. A guidebook called The Derwent Valley Heritage Way gives complete OS maps of the route in 10 sections with easy to follow directions and description of the key sites and features along the walk.

Derwent Valley Mills World Heritage Site - This international designation confirms the outstanding importance of the area as the birthplace of the factory system where in the 18th Century water-power was successfully harnessed for textile production. It stretches 15 miles down the river valley from Matlock Bath to Derby.

## **ROUTE**

The northern section:

Ladybower Reservoir to Matlock and Whatstandwell

- Heatherdene to Leadmill and Hathersage 6 miles
- Hathersage and Leadmill to Baslow 7 miles
- Baslow to Rowsley 5 miles
- Rowsley to Matlock 5.5 miles
- Matlock to Whatstandwell 6.5 miles

The southern section:

Matlock to Derwent Mouth

- Matlock to Whatstandwell 6.5 miles
- Whatstandwell to Belper 6 miles
- Belper to Little Eaton 4.5 miles
- Little Eaton to Derby City Centre 4 miles
- Derby to Borrowwash 5.5 miles
- Borrowwash to Derwent Mouth 6 miles

## **BRAND**

‘The National Heritage Corridor’

The National Heritage Corridor is the registered collective trademark of Derwent Valley Trust, a company limited by guarantee registered in England and Wales and registered as a charity.

Marketing is done through website and web links only. In the early years an information brochure was produced, but this is no longer the case due to costs and lack of budget. The guidebook is seen as a marketing tool.

There are 16 distinct places of interest in the Derwent Valley. Derby Art Gallery and Museum, Heights of Abraham, Crich Tramway Village, Midland Railway Centre, Kedleston Hall and the Peak District Mining Museum. All of these attractions are set in the context of the beauty of the Valley itself with its walking and cycling routes. In truth, however, The World Heritage Site attractions compare poorly with their nearby neighbours.

The Trust is working in parallel to create a long distance cycle way, adjacent to the walking route, but due to funding issues this may take some time to achieve.

[www.snh.gov.uk](http://www.snh.gov.uk)

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**Dualchas Nàdair na h-Alba**

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