APT1 Economic Impact Assessment

March, 2012

Considering a new trail in the light of current
Ayrshire tourism performance and similar developments elsewhere

Ayrshire Pilgrims' Trail

Ayrshire Pilgrims' Trail Phase 1 **Economic Impact Assessment**

"The sole determinant of the authenticity of any economic offering of business is the individual perceiving the offering."

Pine II, J. & Gilmour (2007), *Authenticity: what consumers really want*

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1 EXECUTIVE SUMMARY

Ayrshire & Arran 2012/17 Tourism Strategy's stated ambition is for new visitors, longer stays, and higher daily spend.

We believe the Ayrshire Pilgrims' Trail (APT) can grow to bring an annual 5,000-7,000 additional walkers and cyclists to the county, spending £0.7million–£1.9million in the area with a typical 3-6-night stay. Importantly, these 'spiritual tourists' are people who probably would not otherwise be attracted to an activity holiday in Ayrshire.

Worldwide, the religious tourism market is predicted to grow faster than general international tourism, worth an estimated £12.5 billion in expenditure, and expected to show an average annual increase of 10% in international arrivals up to 2015. Moreover, the UN World Tourism Organisation finds that religious tourism is more resilient than leisure and business tourism in times of economic hardship.

In Scotland this is still an emerging and underexploited market, largely overlooked by the main tourism agencies. However, there are now several Scottish pilgrim trails in development, with the encouragement of the mainstream Church leaders – critical decision leaders for the potential market.

In reaching our estimates, we have studied data from comparable recently developed or restored Long Distance Routes (LDRs) which provide evidence that, with good management, user numbers and expenditure can grow rapidly soon after launch.

We believe the APT's historic credentials and its Whithorn destination, recognised as Scotland's Cradle of Christianity, should establish it as one of the premier Scottish pilgrim trails. However, we also believe it is urgent to press this advantage before other new routes (some associated with equally prominent saints) become well established.

NOTE*: The cost issues of maintaining or developing ancient monuments and historic buildings, mentioned in the APT1 Cultural Significance Report, are not taken into account in this economic impact assessment. Such expenditure would take place anyway, even if pilgrimage was not developed.*

James Brown
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March, 2012

2 Overview

Religious tourists accounted for an estimated 28.5 million international trips during 2010, and around £12.5 billion in expenditure – equivalent to 2.1% of global international tourist expenditure.[1]

Moreover, numerical growth among international faith tourists is expected to increase at a faster rate than most business and leisure tourism sectors – almost doubling in the next three years – while their individual expenditure is also on the rise.[2]

Pilgrimage is likewise a rapidly rising tourism market in Europe among professing Christians and, more so, among people who do not profess Christian faith. The popularity and high profile of Spain's *Camino de Santiago*[3] both exemplifies this trend and has contributed to the rapid spread of interest in, and attraction to, pilgrimage as a vacation experience.

An important feature of today's European pilgrimage is that the experience of the journey far outweighs that of the destination as a key driver. Thus, while there is a choice of routes to Whithorn, Ayrshire holds two advantages at this early stage of an emerging market. Those advantages are:

- Ayrshire has a unique and untapped asset in the ancient Pilgrim Trail between Glasgow and Whithorn – the cradle of Christianity in Scotland. This was a premier pilgrimage route before the Reformation, and there is still a clear trail of holy wells, churches, abbey ruins and other sites where medieval pilgrims gathered, rested and worshipped. That sense of walking in the footsteps of ancient generations of pilgrims has strong appeal.

- A good number of churches along the route already have expressed interested in contributing to the pilgrim experience. This unique personal contact will make the journey richer and more meaningful – both to visitors and residents.

However, the upsurge in interest in pilgrimage also means – as in medieval times – rival pilgrim trails are being developed in Scotland. This growth is reflected in the formation in 2012 of an umbrella group, the Scottish Pilgrim Routes Forum. Establishing and growing the Ayrshire Trail's reputation ahead of the field will be the best way to winning brand dominance and gaining optimum market share in what promises to become a contested marketplace. Ayrshire's present competitive edge stands to be eroded if other routes are allowed to gain dominance.

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[1] Religious and Pilgrimage Tourism - International - February 2012 http://oxygen.mintel.com Accessed 22 Feb, 2012

[2] *Ibid*

[3] http://www.caminosantiagodecompostela.com/ (One of several unofficial Camino websites) Accessed 2 March 2012

3 New, experience-based tourism

Tourists now find that goods and services are not enough for a memorable holiday. Increasingly they are seeking engaging, personal experiences. The drive for these includes a desire for authenticity and a less-planned and more impulsive vacation. The change in consumer behaviour has been brought about by several factors such as more active lifestyles, growing environmental concerns and an increase in consumer knowledge, largely through the Internet and especially websites with UGC (user-generated content). Pilgrimage fits the growing interest in 'slow travel' and 'slow food' as it offers the enjoyment of these with opportunities to engage more deeply with local communities and their cultural heritage. The change in consumer psychology and the quest for a more meaningful life was predicted for 2010 by Richard Scase[4] when he summed it up thus in 2002:

Formerly	Searching for ...
Self-focussed	Identity
Indulgent	Affiliation
Immediate (impatient)	Risk-avoidance
Temporary (short-term view)	Health and well-being
Cynical and suspicious	Quality of life
	Authenticity

Table 1: Adapted from Scase, courtesy The Moffat Centre, Glasgow Caledonian University

4 Definitions of adventure tourism

The dictionary definition[5] of 'a risky undertaking of unknown outcome' would seem, at first sight, to preclude pilgrimage, but closer consideration of Table 1 shows that seeking (or travelling) does not by itself guarantee the desired outcome. The Adventure Travel Association recognises that the adventure traveller seeks experiences beyond high adrenalin sports and would qualify as such if two out of three conditions were met; that is, physical activity, interaction with nature and cultural learning or exchange.

However, adventure is subjective and unique to individuals. What a pilgrimage route offers, which gives it a unique selling point (USP) over simple walking on a Longer Distance Route (LDR) is a strong emotional and spiritual element.

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[4] Scase, R. (2002) *Living in the Corporate Zoo - Life and work in 2010* Oxford: Capstone Publishing

[5] Collins English Dictionary

5 Size of the market

The United Nations World Tourism Organisation (UNWTO), estimates that 300 to 330 million pilgrims visit the world's key religious sites every year. This figure includes domestic tourists who are travelling to the sites,which can be substantial in some cases such as Basilica of Our Lady of Guadalupe, Mexico which receives 18 to 20 million pilgrims in a year, or Rome with an annual 6 million pilgrims.

A recent Mintel report estimated that the total size of the international religious tourism market is almost 28.5 million trips (in 2010), worth an estimated £12..5 billion in expenditure alone. This corresponds to 3% of all international tourism trips worldwide, and 2.1% of international tourist expenditure. **According to the UNWTO, religious tourism is more resilient in times of economic hardship than many other forms of tourism (such as leisure and business) because it is not seen as a luxury, but rather travel with a purpose.**[6] The Mintel report predicts that:

> 'Growth in the number of international religious tourist arrivals worldwide is expected to outstrip international tourism growth in general, with an average annual growth rate of 10% up to 2015. Consequently, an expected 46 million international religious tourists can be expected to travel to countries other than their own by 2015.'

Formerly considered a budget segment, religious tourism recorded, in 2010, an average spend per religious tourist of US$684 (about £440). By 2015, this is expected to exceed US$1,000 (about £640).[7]

Since Scotland has no discernible inbound pilgrimage traffic or related substantive management infrastructure then the country cannot benefit from that growth. Although the Historic Scotland sites of Iona Abbey & St Columba Centre (Mull), Isle of Iona, achieved 64,217 visitors in 2010, a near 7% increase on 2009, there are no statistics to show how many of these considered themselves to be on a pilgrimage.[8]

Pilgrimages do take place but they are on a small, localised scale, for example, from Whitekirk to St Mary's, Haddington. There are other instances that will benefit from a more dynamic approach to religious and pilgrimage tourism such as a pilgrimage from Edinburgh to St Andrews planned for 5th July, 2012.[9] Accommodation and a modest scale pilgrimage centre have been built at Luss Parish Church, by Loch Lomond.[10]

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[6] Religious and Pilgrimage Tourism - International - February 2012 http://oxygen.mintel.com Accessed 22 Feb, 2012

[7] *ibid.*

[8] Source: Visitor Attraction Monitor 2010, The Moffat Centre, Glasgow Caledonian University

[9] http://www.thewayofstandrews.com/ Accessed 24 March, 2012

[10] http://www.lussonline.net/index.php Accessed 28 March, 2012

5.1 What other countries are doing

Countries outwith the main religious tourism destinations are recognising the potential to attract more visitors and have developed their own strategies to capitalise on this.

Switzerland Tourism promotes Reformation sites in their country. **The Bahamas** have launched a *Business of Religious Tourism* newsletter and has a dedicated religious travel department, with hotels reporting more business from religious groups.

The election of Cardinal Joseph Ratzinger from **Germany** as Pope led to a 'Pope Benedict' route in Bavaria to places associated with the leader. Germany is also promoting its Reformation sites as part of its religious tourism offer.

In **Italy** the government initiated a project to revive the flagging fortunes of the *Via Francigena*, a European Cultural Route. This is led by the regional government of Tuscany, which hosts about 250 miles (400 km) of the route, in co-operation with the *Opera Romana Pellegrinaggi* (ORP), the organisation at the Vatican responsible for promoting pilgrimages.

Conferences and trade associations that have emerged or developed significantly in the last three years. In 2008, the World Religious Travel Association hosted the first international trade show and educational conference for the sector. In the same year, the United Nations World Tourism Organisation (UNWTO) hosted an international conference on '*Tourism, Religions and Dialogue of Cultures*'.

5.2 Developments in Scotland

Visit Scotland has no religious tourism strategy, either for conferences, attracting groups or encouraging pilgrimage. In a report dated July, 2011 entitled 'Interest Group Travel to Scotland' they note that of the types of groups or organisations coming to Scotland, clan societies make up the largest share at 22% while church/religious groups amount to only 2%. That is twice the scale of Burns societies which gives one pause for thought when the promotional budget for Burns is so large and that for religious tourism is nil. And yet, it should be in Visit Scotland's programme as Rotherham (2007) observes:[11]

> 'Religious tourism - including pilgrimage - is embedded within a complex of heritage tourism and mass tourism activities. The interrelationships are complex, and **interactions with local people and communities are central to the understanding of religious tourism in creating community-based sustainable development**.' (Our emphasis)

[11] Rotherham, I.D. (2007) Sustaining Tourism Infrastructures for Religious Tourists within the UK, p. 65, in Raj, R. and Morpeth, N.D. eds., *Religious Tourism and Pilgrimage Management: An International Perspective*, pp. 64-77, Wallingford: CAB International

6 Review of some existing Trails

Camino de Santiago de Compostela, Spain

In 1985, fewer than 700 *Camino* pilgrims were awarded a '*Compostela*' (the certificate for finishing the route having walked or horse-ridden 100 km or cycled 200 km). By 1990, the figure had risen to almost 5,000. In 2010, a 'Holy Year' (when St James's Day falls on a Sunday), a record 272,703 pilgrims received *Compostelas*; in 2011 it was over 183,000.

Hadrian's Wall Path, England

A paradigm more closely comparable to the Ayrshire Pilgrims' Trail is the Hadrian's Wall Path, where detailed data have been gathered on visitor numbers and spending patterns.[12] In the five years from its opening in 2003 to 2007, the number of long-distance walkers on the 84-mile Hadrian's Wall Path National Trail doubled to 7,420. In 2007 they brought an estimated £1.9 million to the local economy at an estimated daily spend of £40.12. (The total contribution of long-distance walkers and day-walkers was reckoned to be almost £5 million in that year, with a ratio of 36 day walkers to every long-distance walker. However, a much lower ratio could be expected in Ayrshire.)

Southern Upland Way

A study commissioned from Glasgow University (2005)[13] estimated 1,034 long-distance walkers hiked part or all of the Southern Upland Way in 2004, contributing slightly less than £0.5 million annually to the local economy. Their average daily spend of £40.74 was similar to the Hadrian's Wall distance walkers. Their average trip was 14.6 days, with around 46% of distance walkers doing all 212 miles in one trip. Gaps in accommodation provision were identified as a major cause for the SUW's failure to match the growth of similar LDRs.

Kintyre Way

Initiated by local businesses and walking groups, the 87-mile Kintyre Way was launched in August 2006. In 2009, approximately 1,000 walkers completed the entire route, typically taking 4-7 days. According to Tourism Intelligence Scotland: "The prediction is that the walk could bring approximately 5,000 additional walkers to Kintyre each year which has the potential to generate an additional £1.3 million per annum gross tourism expenditure."[14]

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[12] Hadrian's Wall Tourism Partnership 2008. Hadrian's Wall Path National Trail Economic Impact Study & Trail User Analysis 2003 - 2007 [Research by Wood Holmes Group Limited]: http://www.nationaltrail.co.uk/HadriansWall/downloads.asp?PageId=191 Accessed 31 March 2012

[13] Crichton Tourism Research Centre 2005. The southern upland way - an underused resource for southern Scotland? http://www.sup.org.uk/docs/suw_feb05.pdf Accessed 2 March 2012

[14] http://www.tourism-intelligence.co.uk/~/media/TIS/Documents/Intelligence%20and%20insights/WALKING_16_465.ashx Accessed 2 March 2012

7 Accommodation in Ayrshire

One of the main objectives of the Trail development is to encourage visitors to linger in the county and enjoy its landscapes, towns, villages and visitor attractions. Therefore accommodation provision is a vital element in achieving that. However the distribution of accommodation is in inverse proportion to the congregating numbers of pilgrims. That is, accommodation is at its most sparse in the south where pilgrim numbers will increase as they funnel closer to Whithorn. It is estimated that 30% of UK-origin tourism expenditure in Scotland is on accommodation[15] making it the biggest single aspect of a tourist's expenditure. It must be borne in mind that accommodation is subject to VAT at 20%, a sum that goes to the UK Treasury in London and becomes a significant part of 'leakage' from the local economy.

7.1 Distribution

While lack of accommodation may be seen as a problem, it is also an opportunity, especially if market growth is sufficient to encourage investment in new facilities. The distribution pattern in Figure 1 is repeated with the membership of the Ayrshire Bed & Breakfast Association and Scotland's Best B & Bs. However, none of this is an impediment to either creating or establishing the Ayrshire Pilgrims' Trail. Indeed, the support of the present accommodation sector will help publicise and grow the market.

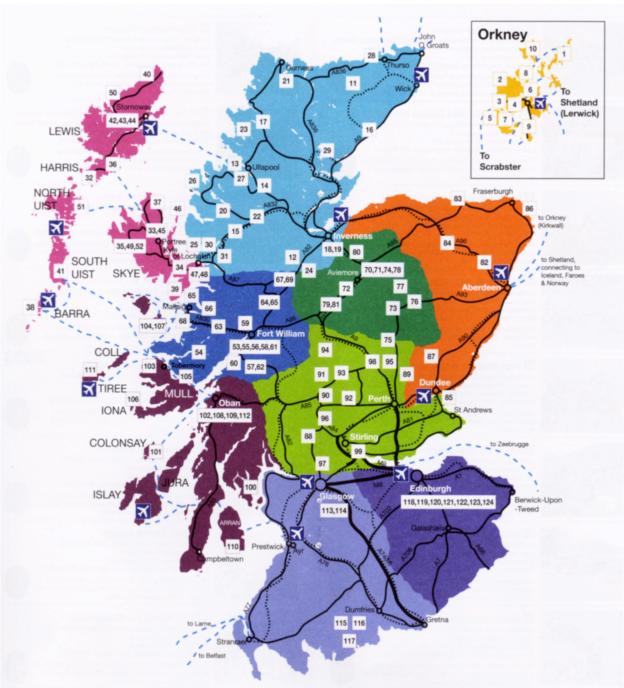

Figure 1: This map from the Scottish Independent Hostels Guide 2012 shows no members in Ayrshire.

[15] Source: Smyth, M-A. and Black, H. (2008) *The Socio-economic Potential of the Galloway and Southern Ayrshire Biosphere Reserve* Section 6.14, Report for Scottish Natural Heritage, Forestry Commission Scotland and the Councils of Dumfries & Galloway, East Ayrshire and South Ayrshire

7.2 Seasonality

In Medieval times pilgrims would endeavour to arrive at their destination in time for Easter or the Feast Day of the patronal saint. With St Ninian's Day being 16th September it is close to the end of the recognised holiday season. In spite of many efforts by tourism bodies to extend the season with initiatives such as a *Snowdrop Festival* and *Autumn Gold*, the Scottish climate, or more correctly, the tourists' perception of Scottish weather, ensures that there is little change to a pattern which steadfastly refuses to spread itself. The variable Scottish weather teased us in 2012 with a new March record of 23.6° Celsius in Aberdeenshire followed a few days later by snow.

It can safely be assumed that the numbers of pilgrims on the Ayrshire Trail will be proportionate to the pattern shown in Chart 1 below.

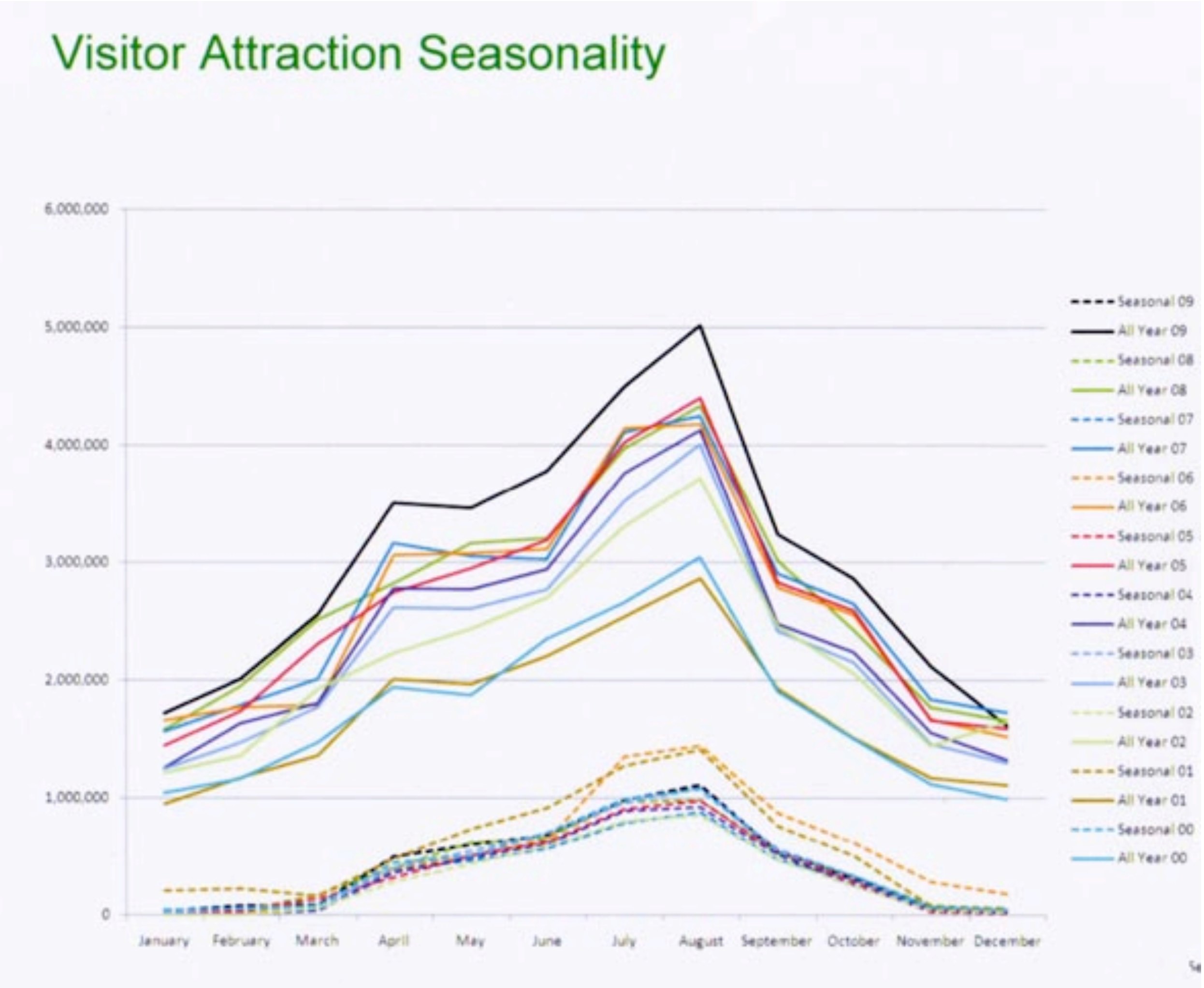

Chart 1: Vivid illustration of the virtually unchanging seasonality of Scottish tourism over a decade. *Source*: The Moffat Centre, Glasgow Caledonian University

8 Longer stay, higher daily spend, new visitors

The tables in Appendix 2 on pages 21-23 show recent visitor statistics for Ayrshire & Arran. The new pan-Ayrshire Tourism Strategy emphasises...

- extending visitor stay;
- increasing average visitor spend; and
- attracting new visitor groups.

Pilgrims walking or cycling the Trail will meet all three aims.

8.1 More bednights

At present, domestic tourists (33% of all visitors to Ayrshire) stay on average 3-4 days. Overseas visitors (5% of all visitors to Ayrshire) stay an average of 6 days in the county (South Ayrshire Council 2011).

Most pilgrims will not seek full-on penitential austerity, but all will recognise that a degree of 'roughing it' is an authentic and important part of the experience. 'Luxury' pilgrimage is an oxymoron! Thus we envisage that pilgrim walkers and cyclists will mostly stay in B&Bs but be prepared to use more basic accommodation such as backpacker hostels, sleeping barns, rent-a-tent schemes and the like, for at least part of the way. In other words, pilgrims will fill beds where conventional walkers might not stay for the sake of continuing their journey. Moreover, they will necessarily bring their custom to remote rural areas that are in greater need of tourism income and where occupancy rates for hotels and B&Bs is traditionally lower.

However, Mintel note that religious tourism was once very much a budget segment, with an average spend per day that was much lower than leisure tourists. But this is rapidly changing, and it is a trend that is expected to continue. They report that in 2010, the average spend per religious tourist was US$684 (about £440) and that by 2015, this is expected to exceed US$1,000 (about £640). The growing American market is particularly predisposed to demanding luxury accommodation and transport. The Italian Tourist Board has recognised a general shift of religious tourists to more luxurious accommodation, and has developed products to cater for this change. [16]

As the tables in Appendix 2 on pages 21-23 show, accommodation occupancy rates in Ayrshire show ample spare capacity, with guesthouses and B&Bs reaching only 65% in the peak month of June. Annual rates for other accommodation are low compared to the Scottish average.

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[16] Religious and Pilgrimage Tourism – International – February 2012. http://oxygen.mintel.com Accessed 22 Feb, 2012

Proposed in the Ayrshire & Arran Tourism Strategy for 2012-17 is an accommodation audit to identify gaps in provision. Such an audit was completed in 2011 by Ailsa Horizons for the Carrick region. The Strategy document also proposes raising awareness for rural diversification into tourist accommodation, together with encouraging investment where strategic gaps are identified.

These measures would significantly benefit the growth of the Ayrshire Pilgrim Trail; an infrastructure that offers somewhere to eat and sleep at the end of each walking day is critical. By the same token, lack of strategically-spaced accommodation has limited the 212-mile Southern Upland Way's ability to grow apace with highly successful longer distance routes such as the West Highland Way and the Hadrian's Wall Path.[17]

Meantime, where demand exceeds supply, accommodation providers have traditionally been happy to collect and return guests to and from their longer distance route (LDR).

8.2 Higher daily spend

Currently domestic tourists spend £39 per night. Their average spend per trip is £155. Overseas visitors spend £353 per trip (£58 per day). [18]

VisitScotland data show that activity tourists – including walkers and cyclists – spend more: £40-60 per night and around £300 per trip. The average per walking trip is £313. For cyclists the average local spend is £200 per trip (this may reflect a shorter stay).

On the *Camino de Compostela*,[19] which has collected the longest and largest record of pilgrim data in Europe, there are typically five walkers to every cyclist. Recent research on the international religious tourism market predicts the average spend per religious tourist will be more than £640 by 2015.[20]

8.3 New visitor group

Pilgrimage brings new people into the walking and sector who wouldn't otherwise consider a walking or cycling holiday and who are probably not in a walking or cycling club. Pilgrims include a large and easily targeted market group. Christians can be reached through established Church networks in the UK and – importantly – abroad. Group pilgrimage is already well established across Europe (and especially in the Roman Catholic Church) with many organisers in operation. Pilgrim groups already come from Northern Europe to the UK.

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[17] Hadrian's Wall Tourism Partnership 2008. Hadrian's Wall Path National Trail Economic Impact Study & Trail User Analysis 2003 - 2007 [Research by Wood Holmes Group Limited]: http://www.nationaltrail.co.uk/HadriansWall/downloads.asp?PageId=191 Accessed 31 March 2012

[18] South Ayrshire Council, 2010

[19] Archdiocese of Santiago de Compostela: http://peregrinossantiago.es/eng Accessed 2 March 2012

[20] Religious and Pilgrimage Tourism – International – February 2012. http://oxygen.mintel.com Accessed 22 Feb, 2012

The growing numbers of non-Christians seeking to undertake this spiritual discipline may be a more diffuse group, but are proactive in seeking this experience. Anecdotally, they include many high-achieving but stressed professionals starting to question the worth of their lifestyle and work choices. It makes sense to view pilgrimage as a crossover phenomenon, reaching culture-and-heritage tourists but taking them (at least those who walk, cycle or horse-ride) on an activity holiday. Given the size of the religious/spiritual tourism market group, it should not be regarded as a niche market. To put it baldly, card-carrying Christians and others seeking spiritual nurture easily outnumber Burns fans!

Pilgrimage has the potential to increase visitor numbers among the higher-spending tourist sector of walkers and cyclists. While some may choose a degree of austerity, all walking and cycling pilgrims need more bed-nights than the average visitor. Walking a typical 12.5miles daily implies 6 overnight stays on the Ayrshire Trail. Pilgrims on foot or bike must shop and eat locally, spending more with independent traders, and thus generating a higher dividend for the local economy. Cyclists can easily cover over three times the distance as walkers in a day. But pilgrims on bikes will not ride at the same pace as the average touring cyclist; their aim is to make time for visiting heritage sites and churches *en route*.

Mintel report that the growing American market is demanding luxury accommodation and transport, while the Italian Tourist Board has recognised a general shift of religious tourists to more luxurious accommodation, and has developed accommodation products to cater for this change.[21] However we would contend that this applies to mature, well developed pilgrimage routes. In Scotland that will eventually happen, no doubt, in the course of time. There will be a natural progression in the development and character of the Ayrshire Pilgrims' Trail, the course of which we set out in Table 2.

8.4 Pilgrims - profiling a new visitor group

Pilgrimage brings new people into the walking and cycling sector who wouldn't otherwise consider such holiday and who are probably not in a walking or cycling club. Pilgrims include a large and easily targeted market group. Christians can be reached through established Church networks in the UK and – importantly – abroad. Group pilgrimage is already well established across Europe (and especially in the Roman Catholic Church) with many organisers in operation. Pilgrim groups already come from Northern Europe to the UK. The growing numbers of non-Christians seeking to undertake this spiritual discipline may be a more diffuse group, but are proactive in seeking this experience. Anecdotally, they include many high-achieving but stressed

[21] Religious and Pilgrimage Tourism – International – February 2012. http://oxygen.mintel.com Accessed 22 Feb, 2012

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Table 2: Shows our perception of how uptake of the Ayrshire Pilgrims' Trail will grow over a period of years, possibly maturing to the point that its appeal extends to an emerging market of religious tourists (particularly from the USA) seeking luxury accommodation and transport.[22]

Group	Profile	Opinion leaders
Innovators and early adopters (first 16%)	Mostly committed Christians, probably with some walking experience - possibly on pilgrimage (e.g. Iona, Lindisfarne, Camino), very likely to be in leadership positions in their church communities. Walking tour leaders.	Senior church leaders and theologians - via blogosphere and other social networks
Early majority (next 34%)	Mostly committed Christians or people used to walking/cycling holidays. Some non-Christian with strong bias to personal spiritual development but not necessarily experienced walkers. Experienced walkers/ cyclists attracted to cultural and heritage elements of route and not deterred by occasional nights of very basic accommodation.	As above plus peer2peer recommendations. Local church leaders. Walking tour companies. Religious and walking/cycling writers and media.
Late majority (next 34%)	Rank-and-file committed church members (often in groups) with little or no walking/ cycling background. Others whose primary attraction is the spiritual, heritage or cultural dimension and who may or may not have walking/cycling experience.	As above, plus general press (lifestyle and travel sections). Local voluntary holiday group leaders in churches and clubs.
Laggards (final 16%)	More risk-averse, but fit church members and non-Christian spiritual seekers, having overcome concerns about dormitory-style accommodation, coping with distances etc. Others on tour packages that meet higher comfort demands (upscale accommodation, baggage forwarding, etc.)	As above, plus tour companies offering high-budget pilgrimage/activity holidays emphasising comfort not penance. The trail 'brand' is fully established and has 'bragging rights'.
After Rogers, M. (1983) Diffusion of Innovations. New York: Free Press		

[22] Religious and Pilgrimage Tourism – International – February 2012. http://oxygen.mintel.com Accessed 22 Feb, 2012

9 Potential value of the Ayrshire Pilgrims' Trail

Table 3 indicates a projection of what pilgrims could spend in Ayrshire in up to 6 nights (75 miles at an easy-moderate walking pace). The projected daily spend is extrapolated from the Hadrian's Wall data, with 3.6% added for inflation.

Over a period of 10 years, we believe that turnover in the region of £1.9 million is achievable, with 7,000 pilgrims taking 6 days to travel slowly through Ayrshire. A 5-year target of 2,000 pilgrims spending over £0.5million seems realistic.

The availability of beds may circumscribe visitor numbers – probably more so than demand from pilgrims. However, this is not an insurmountable limit to growth – as has been creatively demonstrated by businesses catering elsewhere for walkers. Simple, low-investment accommodation alternatives can be quickly installed to bridge the gap between existing stopover providers. These include rent-a-tent schemes, camping barns, timber wigwams, pods and the like.

Significantly, it was largely local and national government investment in the *Camino's* infrastructure - notably the renovation of hotels and building of extra hostels – that led to the massive surge in pilgrim numbers in the 1990s.

Trip spend at £ 45.38 daily average			
Pilgrims	2 days	4 days	6 days
1	£ 91	£ 182	£ 272
100	£ 9,076	£ 18,152	£ 27,228
200	£ 18,152	£ 36,304	£ 54,456
500	£ 45,380	£ 90,760	£ 136,140
1,000	£ 90,760	£ 181,520	£ 272,280
2,000	£ 181,520	£ 363,040	£ 544,560
3,000	£ 272,280	£ 544,560	£ 816,840
4,000	£ 363,040	£ 726,080	£ 1,089,120
5,000	£ 453,800	£ 907,600	£ 1,361,400
6,000	£ 544,560	£ 1,089,120	£ 1,633,680
7,000	£ 635,320	£ 1,270,640	£ 1,905,960

Average daily spend based on Hadrian's Wall Tourism Partnership [Research by Wood Holmes Group Limited], 2008

Table 3: Projected spend by walking pilgrims in Ayrshire.

10 New business opportunities

The Mintel report shows that,

> '... people are increasingly finding ways to integrate their beliefs into their lives, and consequently travelling for religious purposes is becoming more common as travel and religion become a combined activity. This creates a cycle whereby tour operators specialising in religious tours emerge and grow as demand increases, and as more operators appear on the market and advertise their products, the demand increases further.'[23]

Pilgrimage can be considered as 'soft adventure tourism' and as such, offers a much lower risk than 'hard adventure tourism' with its supply side requirements for specialist equipment, training and insurance. The 'soft' market is more than ten times greater than the 'hard' although the latter could be perceived as larger as it has much more dramatic visual appeal with action images beloved of tourism publicists.

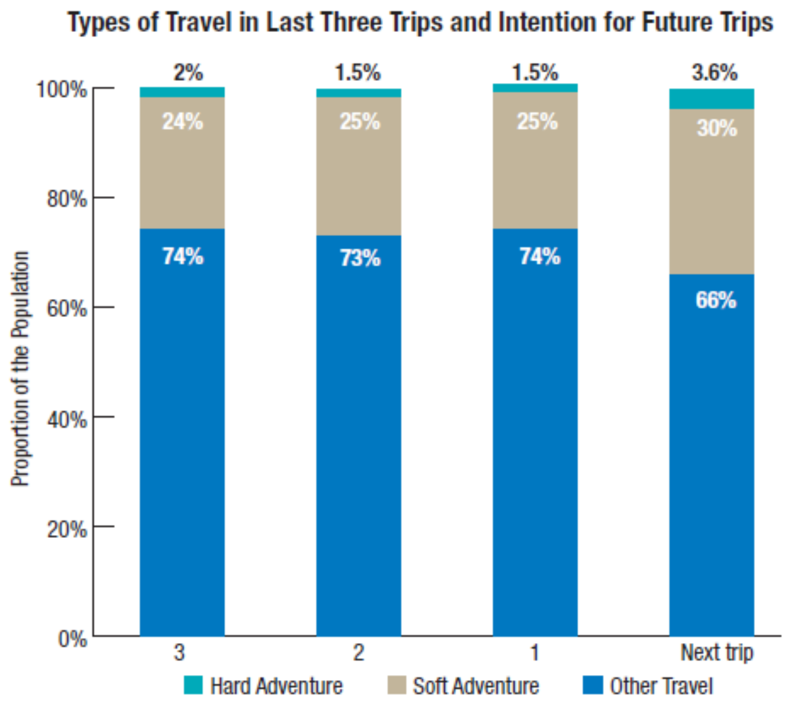

Chart 2: The Moffat Centre, Glasgow Caledonian University

Although pilgrimage is ideal for small, local businesses to manage, promotion would require entering into partnerships. Mintel identify some of the large travel operators in the pilgrimage market but for the time being it is highly unlikely that Scotland is 'on their radar'. The cycling sector, which will be an important element in Scottish pilgrimage, already has ground handling businesses for which pilgrimage offers scope for growth. To identify other opportunities the concept of new tourism and the definitions of adventure tourism require study.

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[23] Religious and Pilgrimage Tourism – International – February 2012. http://oxygen.mintel.com Accessed 22 Feb, 2012

New business opportunities investors, businesses and employment include:

- Specialist tour guides and leaders
- Tour operators
- Providers, fabricators and installers of camping Katas (semi-permanent tents), timber wigwams, camping pods, log cabins etc.
- Rent-a-tent supply and management
- Luggage transfers (from one night stop to the next and back to base)
- Back-to-base transport
- Gift and craft couriers ('you shop, we drop')
- Camping barn conversions
- New pilgrim bothies and hostels
- Refectories.

Costumed re-enactors and story-tellers are an increasingly popular part of cultural interpretation and authentic tourism experiences. Ayrshire has a number of people in this field and their range of characters (already considerable) could be extended with the development of the Ayrshire Pilgrims' Trail.

Figure 2 (left): Kathryn Baldwin as a medieval pilgrim for BBC TV's *Landward* filming of the Ayrshire Pilgrims' Trail.

Figure 3 (right): Denis Reid as Robert II, King of Scots, at Dundonald Castle - just one of many characters Denis portrays at events across Scotland.

11 Conclusions and Vision Statement

Pilgrimage is a growing and robust tourism market worldwide, but Scotland currently is still not benefiting from this growth. However, evidence from comparable LDRs in the UK (as well as Spain's *Camino de Santiago de Compostela*) endorses our belief that a pilgrimage trail from Glasgow to Whithorn via Paisley and Ayrshire would bring sustainable economic benefit to the county.

An achievable figure of 7,000 pilgrims annually could contribute nearly £2 million to the Ayrshire economy.

However, this emerging market also is set to be a contested one with other pilgrim trails already in development in Scotland. There is an urgency in establishing the brand's recognition and reputation by launching a quality offering ahead of the field.

*The **Vision Statement** is presented as a starting point - the vision should be set by the steering group or newly-constituted association charged with the next stage of development.*

To create a pilgrimage '*Way*' of multiple routes from Glasgow to Whithorn through Ayrshire that will provide pilgrims and other participants with a rich, authentic, spiritual experience drawing upon the region's cultural and natural heritage.

That the Ayrshire Pilgrims' Trail or '*The Ayrshire Way*' is the first established of several historical trails to Whithorn to be known as '*The St Ninian Ways*' and to seek recognition from the Council of Europe as the first UK-focussed European Cultural Route.

That '*The Ayrshire Way*' be fully engaged with its stakeholders, in particular the church congregations, local communities and other relevant networks, to ensure its continuity and growth as a sustainable enterprise contributing to the local economy.

That '*The Ayrshire Way*' is developed to the highest standards of physical manifestation, cultural interpretation and promotion to a local, national and international audience.

That '*The Ayrshire Way*' becomes an exemplar for other potential pilgrimage routes in Scotland and that it is represented on a fully-constituted Scottish Pilgrim Routes Forum whereby it can learn from, and share with, others to establish best practice for continued growth and development.

Appendix 1: Definitions of religious tourism

- **Religion and pilgrimage tourism** refers to all travel outside the usual environment for religious purposes, excluding travel for professional purposes (*e.g.* priests travelling for work). Attending wedding parties or funerals are generally classified under the heading of Visiting Friends and Relatives. However, in countries where these ceremonies have a strong religious connotation, it may be more appropriate to classify them under the heading **Religion and Pilgrimages.**[24]

- Religious tourism refers to travelling to visit a place, building or shrine deemed sacred or holy. There are four sub-groups of religious tourism: **pilgrimages**; religious tourism *per se* (visiting a religious site because it is sacred); travelling to a religious event (for example *Semana Santa* in Seville); and **church tourism** (visiting houses of prayer and shrines due to their cultural, historical, and architectural significance rather than from any religious motivation).[25]

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[24] United Nations World Tourism Organisation *(UNWTO): Concepts, Definitions and Classifications for Tourism Statistics, 1995*

[25] Mintel: *Religious Tourism, Travel & Tourism Analyst*, March 2005

Appendix 2: Ayrshire Tourism Statistics

Purpose of Trip

	UK tourist trips (%)		O'seas tourist trips (%)	
	Ayrshire	Scotland	Ayrshire	Scotland
Holiday	79	66	46	52
Visit friends or relatives	15	11	42	29
Business	5	19	6	15
Other	1	4	6	4

Source: http://www.visitscotland.org/research_and_statistics/regions/western_scotland.aspx

Accommodation used

	UK tourist nights (%)		Overseas tourist nights (%)	
	Ayrshire & Arran	Scotland	Ayrshire & Arran	Scotland
Hotel/ Guesthouse	35	29	12	24
Friends/Relatives	22	33	46	36
Self-Catering	11	13	28	14
Camping/ Caravanning	21	15	1	4
B&B	4	4	8	9
Other	7	6	5	13

Source: http://www.visitscotland.org/research_and_statistics/regions/western_scotland.aspx

Visitor Numbers and Days to Ayrshire by Type of Visitor in 2009

Visitor Type	**Visitor Numbers ('000s)**	**Visitor Days (000s)**	**Spend Generated, £M**
Hotels, Guest Houses & Bed and Breakfasts	550	1130	£ 104
Self-Catering, Touring & Camping	320	1990	£ 92
Staying with Friends & Relatives	510	1870	£ 66
Day Visitors	2150	2150	£ 81
Total	3430	7130	£ 342.31

Source: South Ayrshire Council (2009)

Appendix 2: Ayrshire Tourism Statistics (continued)

VisitScotland accommodation occupancy% for Ayrshire & Arran in 2009

	Hotel Room Occupancy (%)	Guesthouse/ B&B Room Occupancy (%)	Self-Catering Unit Occupancy (%)	Hostel Bed Occupancy (%) (Scotland)
Jan	28	–	11	21
Feb	40	9	25	29
Mar	52	19	19	31
Apr	58	36	32	52
May	56	38	46	63
Jun	71	54	50	57
Jul	83	60	69	65
Aug	78	69	61	73
Sep	69	60	55	54
Oct	65	40	53	43
Nov	36	18	22	23
Dec	30	–	24	24
Average for region	56	34	39	–
Average for Scotland				45

Source: http://www.visitscotland.org/research_and_statistics/regions/western_scotland.aspx

Visitor Numbers and Days to Ayrshire by Type of Visitor in 2009

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Source: South Ayrshire Council (2009)

Appendix 2: Ayrshire Tourism Statistics (continued)

Accommodation occupancy rates

Peak months are outlined in red	Hotel Room Occupancy (%)	Guesthouse/ B&B Room Occupancy (%)	Self-Catering Unit Occupancy (%)	Hostel Bed Occupancy (%) (Scotland)
Jan	29	–	12	18
Feb	44	–	21	29
Mar	53	11	17	32
Apr	64	–	32	46
May	70	48	49	55
Jun	72	65	56	54
Jul	77	52	48	63
Aug	85	58	45	68
Sep	72	63	42	52
Oct	55	26	44	39
Nov	39	–	10	18
Dec	29	–	18	19
Average for region	57	46	33	41
Annual average for all Scotland	63	46	51	42

Time of trip

	UK tourist trips %	
	Ayrshire	Scotland
Jan–Mar	13	19
Apr–Jun	34	28
Jul–Sep	30	30
Oct–Dec	23	23

Source: http://www.visitscotland.org/research_and_statistics/regions/western_scotland.aspx

Figure 4: **The Baker** by Robert Bryden (1865-1939) from his book, *Etchings of Workers or Waning Crafts*, limited edition of 50 copies published by the author in 1912. This image is of particular relevance to pilgrimage (which was not a lonely pursuit) as the origin of companion is from Old French *compaignon*, literally, 'one who breaks bread with another'. A significant appeal of the pilgrims' trail will be real, slow food, of which, home-baked bread will be a staple.