

**CEARCAILL NA GAIDHLIG  
AN EVALUATION**

for

**Comhairle nan Eilean Siar,  
and partners in the  
Cearcaill na Gàidhlig Project**

by

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**Final Report**

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# Evaluation of Cearcaill na Gàidhlig Project

## Final Report

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## EXECUTIVE SUMMARY

- E1 Cearcaill na Gàidhlig (Gaelic Rings) is a tourism marketing initiative based on the transport infrastructure of the Hebridean islands and the West Highland mainland. The initiative promotes tourism by showing how easy it is for visitors to travel round the area and experience Gaelic culture en route.
- E2 The initiative is managed through a Steering Group which includes representatives of the following funding partners and other agencies:
- Argyll and Bute Council
  - Bord na Gaidhlig
  - Comhairle nan Eilean Siar
  - Highland Council
  - HITRANS
  - CalMac
  - VisitScotland.
- E3 The aims and objectives of Cearcaill na Gàidhlig have been to:
- Boost cultural tourism and Gaelic language related activity;
  - Develop and demonstrate the links between the core Gaelic speaking areas of the Western Highlands and Islands;
  - Demonstrate the accessibility of the Highlands and Islands and the integrated transport connections within the area;
  - Ensure that the improvements that have been made in transport infrastructure are utilised to boost cultural tourism and Gaelic language related visitor activity;
  - Offer a linguistic and culturally rich experience for tourists;
  - Offer a new and locally innovative marketing solution to businesses undertaking cultural or Gaelic-related activity;
  - Encourage businesses in the tourism industry to enhance the Gaelic and cultural experiences they offer.
- E4 A pilot Ring was launched in 2007, based on a journey starting from Oban and travelling to Barra, Eriskay, South Uist, Benbecula, North Uist, Skye, Mallaig, and then returning to Oban via the Rough Bounds. The journey was based on one of the CalMac Island Hopscotch routes. It was promoted to the potential visitor through a website and a wide range of associated marketing activity. Businesses in the area were invited to become involved and were provided with materials to raise the awareness of existing and new visitors of Gaelic-related facilities and activities along the routes.
- E5 The project was expanded and enhanced in 2008 and 2009. Five new Rings were introduced, each based on one of the Island Hopscotch routes. Marketing activity was expanded and enhanced, the website was improved and relaunched, and an effort was made to involve more island based businesses.

E6 Expenditure in the first three years of the initiative has been:

2007: £ 86,388  
2008: £141,091  
2009: £ 75,707.

E7 Since the introduction of the Gaelic Rings in 2007, the available evidence suggests that the number of visitors to the area has increased, accommodation providers are busier, the numbers of passengers carried on ferries to the islands involved in the Gaelic Ring routes have grown and more Island Hopping tickets have been sold. The Gaelic Rings is promoting an aspect of island life which is of interest to the majority of visitors to the area and it is using appropriate means of marketing to reach them – although a number of other major factors have influenced this visitor growth, including the RET pilot project which has reduced ferry fares on the routes to the Outer Hebrides.

E8 Further investigation was carried out to try to distinguish the specific impacts of the Gaelic Rings initiative. This included:

- telephone interviews with stakeholders;
- telephone interviews with potential partners and other interested parties;
- an online survey of businesses listed as partners on the Cearcaill na Gàidhlig website;
- follow up telephone interviews with a number of these businesses and additional businesses.

E9 Our interviews provided positive feedback, although this focused on the supply side and little information was available on demand from consumers for the Gaelic Rings, how well the routes have been received and the degree of take up. Consultees generally:

- Are positive on synergies between transport, tourism and Gaelic development;
- Are positive about the quality of the promotional materials produced;
- Regard the Gaelic Rings as a long term investment – taking time to build a concept;
- Believe there should be closer links with partner businesses to promote and enhance the provision for visitors following a Gaelic Ring;
- Have differing views on whether the number of Rings should grow, stay the same or be reduced;
- Have differing views on the markets that should be targeted;
- Now wish to see an increased focus on outputs in order to justify continued investment.

E10 The online survey was made available to 144 selected businesses listed on the Gaelic Rings website and who had received marketing materials relating to the initiative. Including businesses which were contacted by telephone, an overall survey response of 23% was achieved, supplemented by telephone follow up.

E11 The conclusions from the consultation with partner businesses were that:

- Although considerable effort has gone into signing up businesses, relationships have yet to be developed to create a sense of partnership;
- Businesses as yet can identify little direct economic benefit from Gaelic Rings from increased visitor numbers or length of stay;
- Cearcaill na Gàidhlig is mostly regarded as a source of good quality leaflets to pass on to their customers;
- There is goodwill from the majority of businesses towards Gaelic language and culture, and there are opportunities to work more closely with these businesses.

E12 The conclusions of our research and analysis of the limited data available are that the objectives for the Gaelic Rings are ambitious for an initiative with an average annual budget over its first three years of around £100,000 (including set up costs). While we have found evidence of some achievements in delivering some of the initiative's objectives, it is perhaps not surprising that, overall, the degree of success appears to have been limited. The objectives are arguably too ambitious and wide ranging, and we suggest that they should be refocused towards more deliverable and measurable outcomes.

E13 Our recommendations on how Cearcaill na Gàidhlig might build on its work to date and move the initiative forward are:

### **Objectives**

The three main elements of Cearcaill na Gàidhlig relate to:

- Transport infrastructure;
- Gaelic language and culture;
- Tourism.

E14 We suggest that better defined and achievable operational objectives, with associated measurable outcomes, should be set for each of these once market, product development, partnership development and customer relationship priorities have been adopted. Recommendations on these are provided below.

### **Target Groups**

E15 Cearcaill na Gàidhlig has not yet defined specific groups it is trying to reach. It is currently aimed at a wide visitor market and promotes the Gaelic Rings to people who are already on holiday in the area, as well as trying to generate new business through general – and sometimes relatively expensive – marketing.

E16 We suggest that it would be more productive to define and focus on particular target groups and to develop a marketing strategy to reach them. One target group suggested is people with an interest in Gaelic language and culture, including Gaelic learners and speakers. This is a widely dispersed group – as well as in Scotland, there are Gaelic societies and learners groups in countries such as Australia, Canada, England, Germany, New Zealand and the USA. The Atlantic Gaelic Academy offers distance learning classes to students all over the world. Members of these groups are potential customers, many of whom are likely to have an interest in both short language courses and in holidays where they can hear Gaelic spoken in an everyday setting. This market also has the advantage of being relatively easy to contact, since individuals are likely to be members of a formal group.

- E17 Similarly, people who are involved with or have an interest in Gaelic music and culture would be a logical target group. This might involve joint working with groups such as Fèisean nan Gàidheal and Celtic Connections as well as local groups and events such as the Hebridean Celtic Festival.

### **Product Development**

- E18 Defining target markets would not preclude Gaelic Rings material being available for other visitors and potential visitors, but it would make it possible to develop a product that would attract these markets. For example, the Gaelic learners market is likely to be interested in accommodation where Gaelic is spoken; in guided walks with a bilingual leader; in heritage centres where there is Gaelic interpretation; and in Gaelic music and ceilidhs. All of these will tend to be of interest to a wider market with an interest in Gaelic culture, but they would be of particular interest to Gaelic learners. Developing the product in such ways with features on the Gaelic Rings website, and links to other websites, would build a brand which promotes the outstanding natural environment of the area coupled with its distinctive Gaelic heritage and would strengthen the product for all potential visitors.

### **Building Partnerships**

- E19 A stronger product should be developed through working with partners who have a stake in developing provision that fits the market. These partners (particularly private sector businesses) might also be given a role in shaping provision for Gaelic Rings visitors through participation in workshops and continuing communication. Tour operators are keen for Cearcaill na Gàidhlig to succeed, and it will be important to ensure that they are involved in discussions. For their part, Gaelic development agencies could offer specific training or help businesses to invest in their product. Limiting participation to those businesses with a genuine and enthusiastic interest in developing Gaelic-related tourism and offering a quality service would lead to a much reduced and more manageable number of partner businesses. Leaflets and other promotional material could be distributed more widely (perhaps to associate businesses), but the ethos of the partnership would be that each party has some responsibility to the others. Cearcaill na Gàidhlig would put information about what partner businesses can offer on its website, with appropriate links to simplify the booking process for the visitor.
- E20 There would also be potential to develop the Gaelic Rings as a more general tourism product once the brand and the product have developed sufficient profile. The Ring of Kerry, for example, is featured by many tour operators, including being an option as an extension to a round Britain cruise by Princess Cruises.
- E21 A stronger partnership with VisitScotland is also recommended, in particular through active promotion of the initiative by Visitor Information Centres in the Gaelic Ring areas, and a raised profile on VisitScotland's website.

### **Building Relationships with Customers**

- E22 Relationship marketing – creating a communication channel with potential customers – is particularly appropriate for an initiative such as Cearcaill na Gàidhlig, where potential visitors have an intrinsic interest in the product. Through the internet and email, relationship marketing has become much easier, and Cearcaill na Gàidhlig should start building a database of those interested in its product so that it can keep them informed of developments – activities being offered, forthcoming events of special interest, improvements in the transport infrastructure, etc. Such a communication channel, however, needs to be two way, so that customers can also use the Gaelic Rings website to keep each other informed about what they have done, what they have enjoyed (and what they haven't) on their Gaelic Rings journey, etc.

E23 A book of vouchers offering discounts or other incentives would also help in monitoring the uptake of the Gaelic Rings and illustrate take-up to partner businesses.

### **Management and Funding**

E24 We suggest that to take these recommendations forward, at least in the short term, more active management will be needed, either through a management contract or the appointment of a project officer. This would not be possible within the currently agreed funding from the project partners, which allows for an annual budget of £65,000 over each of the next three years. However, taking the initiative forward in the new ways suggested, with revised objectives and a renewed focus, could make it attractive to new partners such as HIE, or to funding sources such as LEADER. In particular, investment in a revised model would enable Cearcaill na Gàidhlig to contribute fully to Scotland's Islands, the celebration of island cultures scheduled for Spring 2011 to Spring 2012.

### **A Development Scenario**

E25 Ultimately, success will be judged on impact. For example, attributing £50,000 of the annual expenditure on the initiative to its role as a tourism marketing mechanism might be expected to generate at least £500,000 in additional visitor spending to represent good value for money – i.e. (in round figures) 1,000 new visitors to the area per annum x £500 average spend per trip. This would require a much improved inter-active website, strong commitment from a core of businesses in different areas, a means of visitors booking Rings as a complete holiday, and sharper targeting of markets. Eventually, marketing expenditure by partner businesses should replace a proportion of the initiative's public agency support funding.

### **Monitoring and Market Intelligence**

E26 During Cearcaill na Gàidhlig's next development phase, we recommend that mechanisms be established to obtain feedback from:

- People who receive marketing material in advance of their visit;
- People who have purchased Island Hopscotch tickets;
- Other visitors on holiday in the Gaelic Ring areas (to check their awareness of the initiative);
- People known to have taken Gaelic Ring holidays.

## 1. INTRODUCTION

1.1 Cearcaill na Gàidhlig (Gaelic Rings) is a cultural tourism initiative which began with a pilot year in 2007, and was built on and developed in 2008 and 2009. Comhairle nan Eilean Siar has worked with its funding partners – Argyll and Bute Council, Bord na Gaidhlig, Caledonian MacBrayne, HITRANS and Highland Council – to develop the Gaelic Rings and take the initiative forward. The partners have now commissioned this evaluation in order to inform the future direction of the project.

1.2 The objectives set for this evaluation were to:

- Assess the aims and objectives of Cearcaill na Gaidhlig and the extent to which activity to date is contributing to meeting these;
- Identify its potential economic impact;
- Identify its potential impact on the Gaelic language, including potential for creating opportunities to learn and use Gaelic;
- Make recommendations on future priority areas of activity for the project;
- Make recommendations relating to external funding opportunities, and opportunities for longer term sustainability, for the project.

1.3 The evaluation has been carried out largely as a desk based exercise. In reaching our conclusions we have:

- Reviewed the material available on Cearcaill na Gàidhlig;
- Consulted with the funding partners and other stakeholders;
- Carried out an online survey of businesses associated with the initiative;
- Reviewed data on tourism in the relevant areas;
- Reviewed data on Gaelic language development in the relevant areas;
- Reviewed the Cearcaill na Gàidhlig website and marketing materials and their use.



## 2. CEARCAILL NA GAIDHLIG

2.1 Cearcaill na Gàidhlig is a tourism marketing initiative designed to boost both cultural tourism and Gaelic language related cultural activity. It is based on making better use of the transport infrastructure of the Hebridean islands and the West Highland mainland, promoting tourism by showing how easy it is for visitors to travel round the area and experience Gaelic culture en route. The initiative is managed through a Steering Group which includes representatives of the following funding partners and other agencies:

- Argyll and Bute Council
- Bord na Gaidhlig
- Comhairle nan Eilean Siar
- Highland Council
- HITRANS
- CalMac
- VisitScotland.

2.2 The aims and objectives of Cearcaill na Gàidhlig are to:

- Boost cultural tourism and Gaelic language related activity;
- Develop and demonstrate the links between the core Gaelic speaking areas of the Western Highlands and Islands;
- Demonstrate the accessibility of the Highlands and Islands and the integrated transport connections within the area;
- Ensure that the improvements that have been made in transport infrastructure are utilised to boost cultural tourism and Gaelic language related visitor activity;
- Offer a linguistic and culturally rich experience for tourists;
- Offer a new and locally innovative marketing solution to businesses undertaking cultural or Gaelic-related activity;
- Encourage businesses in the tourism industry to enhance the Gaelic and cultural experiences they offer.

2.3 A pilot ring was launched for the 2007 season to create a heavily branded website and a range of printed materials to promote the concept. The purpose of the Cearcaill na Gàidhlig website was to provide visitors with the information required to build their own holiday based on key events, locations and facilities along the Gaelic ring route. Gaelic language and culture were to be the basis for recommendations on 'where to go' and 'what to do', enabling visitors to build a language and culture-rich itinerary. Facilities were to be encouraged to put on particular events and activities linking to the Cearcaill na Gàidhlig concept.

2.4 The Gaelic ring developed for the pilot project encompassed a journey from Oban to Barra, Eriskay, South Uist, Benbecula, North Uist, Skye, Mallaig, and then returning to Oban via the Rough Bounds. This was based on the Caledonian MacBrayne Island Hopscotch route no 15.

- 2.5 For the pilot project, a Cearcaill na Gàidhlig brand and marketing strategy were developed and a number of promotional materials produced, including:
- A Cearcaill na Gàidhlig book that included a story by Angus Peter Campbell and information about the places on the Gaelic ring journey;
  - A website that reflected the contents of the guide book and enabled travellers to plan their journey;
  - A number of stickers and posters advertising and promoting Cearcaill na Gàidhlig.
- 2.6 Promotional activity for the pilot project comprised:
- Direct mail and telemarketing to 450 businesses, leading to more than 300 businesses embracing the initiative;
  - 20,000 brochures designed, produced and distributed, including 10,000 to CalMac terminals and 2,500 for a 'Gaelic on the Boats' initiative with Comunn na Gàidhlig;
  - A website;
  - Initial marketing material - posters, stickers and a dedicated Gaelic Rings page on CalMac's website;
  - A Gaelic in your Business publication.
- 2.7 Following the pilot, the project was expanded and enhanced in 2008 and 2009. Activity included:
- Development of five new Cearcaill na Gàidhlig journeys, giving complete coverage of the Outer Hebrides and West Highland mainland;
  - A high profile launch event in Oban in March 2008;
  - Production of a Cearcaill na Gàidhlig guide book featuring the personal journeys and experiences of acclaimed writers and authors. 10,000 books were produced;
  - A series of new leaflets covering each of the six Cearcaill na Gàidhlig journeys. 150,000 leaflets were printed and distributed across Scotland;
  - Direct Mail and telemarketing which resulted in 620 businesses participating in the Cearcaill na Gàidhlig initiative. Businesses received a 'Gaelic in Your Business' publication, stickers, posters, leaflets and other marketing materials, and are also listed on the Cearcaill na Gàidhlig website;
  - A new Cearcaill na Gàidhlig website designed and launched;
  - Cearcaill na Gàidhlig photographic journeys produced, which are now featured on the website;
  - A Classic FM advertising campaign.

2.8 The inter-agency partnership approach built on the core activity outlined above through marketing activities which included:

- Free publicity in CalMac's 'Explore' publication;
- Cearcaill na Gàidhlig signage at selected stations on the West Highland line;
- An article featuring one of the Cearcaill na Gàidhlig writers' journeys within 'The Herald' Saturday supplement;
- Photographic journeys at Oban Airport and in CalMac's terminals/vessels where possible;
- A dedicated Cearcaill na Gàidhlig page on Cal Mac's website;
- A focus on specific Gaelic Rings within CalMac's e-newsletter;
- Cearcaill na Gàidhlig featured within VisitScotland's mail drop which was circulated to over 110,000 households throughout the UK;
- Cearcaill na Gàidhlig featured in Highland Airways' in-flight magazine;
- Free editorial space promised in future publications by the National Trust for Scotland and Flybe;
- Private sector tour operators developing package holidays and itineraries based on the Cearcaill na Gàidhlig concept, branding and routes.

2.9 There are now six Gaelic rings, each with an account of a personal journey along the route written in Gaelic and English. The Cearcaill na Gàidhlig journeys, and the associated writers, are given below. The route numbers relate to CalMac's Island Hopscotch tours.

Route 7: Mull, Ardnamurchan, Skye: Oban - Craignure / Tobermory - Kilchoan / Mallaig - Armadale / Road - Kyle of Lochalsh to Oban  
*Writer: Dr. Mairi MacArthur*

Route 11: Skye, Uist, Harris, Lewis: Mallaig - Armadale / Uig - Lochmaddy / Berneray - Leverburgh / Stornoway - Ullapool / Road - Ullapool to Mallaig  
*Writer: Angus Peter Campbell*

Route 15: Barra, Eriskay, South Uist, Benbecula, North Uist, Skye: Oban - Castlebay / Barra - Eriskay / Lochmaddy - Uig / Armadale - Mallaig / Road - Mallaig to Oban  
*Writer: Brian Wilson*

Route 18: Islay, Colonsay: Kennacraig - Islay / Islay - Colonsay / Colonsay - Oban / Road - Oban to Kennacraig  
*Writer: Iseabail MacTaggart*

Route 19 Coll, Tiree: Oban - Coll / Coll - Tiree / Tiree - Oban  
*Writer: Professor Donald Meek*

Small Isles: Mallaig - Rum - Eigg - Muck - Canna - Mallaig  
*Writer: Hugh and Jane Cheape*

2.10 The project partners are now reviewing the future direction of the project, including potential future sources of funding.

### **Expenditure**

2.11 Cearcaill na Gàidhlig's expenditure in its first three years has been:

2007: £ 86,388  
2008: £141,091  
2009: £ 75,707.

2.12 The main items of expenditure have been website development, promotional materials and other marketing costs. The Creative Cell, a design and advertising agency based in Glasgow, has to date been commissioned to manage and develop the project and reports regularly to the Steering Group.

### **Measurement and Targets**

2.13 At its meeting in October 2007 the Steering Group agreed five key measurements:

- uplift of ticket sales of identified Island Hopscotch routes;
- increase in traffic to and business within island and mainland businesses;
- increase in traffic to and dwell time on [www.gaelic-rings.com](http://www.gaelic-rings.com);
- pre and post 2008 summer season feedback from Gaelic Ring partner businesses;
- sales of Gaelic Rings books.

2.14 No numerical targets were set for these measures and the Steering Group has not set targets for additional visitors to the area attracted by the Cearcaill na Gàidhlig initiative. VisitScotland claims an average return of 23:1 from its spending on overseas marketing and 30:1 on UK marketing<sup>1</sup>. A more reasonable target – i.e. rate of return – for an early stage initiative such as the Gaelic Rings might be 10:1; an annual spend of around £100,000 would be expected to generate annual additional visitor spend of £1,000,000. The TIC Survey in the Western Isles for 2008<sup>2</sup> suggests that the average length of stay of a visitor in the Western Isles was 9.1 days and their average daily expenditure £49.12, giving a visitor spend per trip of £447. To generate additional spend of £1,000,000, would require an additional 2,000 - 2,500 visitors.

2.15 To put that in context, figures for visitors to some of the Cearcaill na Gàidhlig areas have been estimated in other studies as:

Western Isles <sup>3</sup> (2006)	195,766
Skye <sup>4</sup> (2003)	268,408
Oban, Mull & Lorne <sup>5</sup> (1999)	<u>334,000</u>
	798,174

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<sup>1</sup> VisitScotland. 2007. The tourism prospectus: investing for growth.

<sup>2</sup> Macpherson Research. 2009. VisitScotland: Hebrides - TIC visitor survey 2008.

<sup>3</sup> Sneddon Economics. 2007. Outer Hebrides tourism facts and figures update.

<sup>4</sup> Sneddon Economics. 2004. Volume and value of tourism in the HOST and Moray areas.

<sup>5</sup> HIE. Argyll & the Islands tourism factsheet 2005.

2.16 These figures do not cover the whole area, but they illustrate that to achieve a reasonable rate of return on an annual marketing spend of c£100,000, Cearcaill na Gàidhlig would be targeting a growth in visitor numbers of around 0.25%<sup>6</sup>. The difficulties in clearly identifying such a limited impact on overall visitor numbers illustrates the complexities the partners have faced in setting (and monitoring) realistic and measurable targets.

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<sup>6</sup> These should be people who would not otherwise have visited the Cearcaill na Gàidhlig areas (or not otherwise have visited the Highlands and Islands if taking a regional perspective).

### 3. CONTEXT

- 3.1 Tourism is recognised as a key economic activity within the Scottish Government Economic Strategy and this is reflected in the HIE operating plan and in local authority economic development strategies. The national strategy set a target of a 50% increase in the value of tourism to the economy over the 10 years to 2015, and regional strategies to help achieve such growth have been developed across Scotland. Achieving the targeted growth will be difficult – for example the total number of visitors fell from 16.01 million in 2006 to 14.63 in 2008<sup>7</sup> – but indications are that 2009 was a better year for tourism.
- 3.2 The Outer Hebrides Tourism Industry Association (OHTIA)<sup>8</sup> surveyed its members at the end of the 2009 season. 38 responses were received, with 86% saying their turnover had increased compared to 2008. 16% said their turnover was up more than 50% and a further 14% said that it was up by more than 30%.
- 3.3 VisitScotland operates five Visitor Information Centres in the Outer Hebrides and a number in the other relevant areas for the Gaelic Rings. Visitor numbers for these also show growth, especially from 2008 to 2009:

	2007	2008	2009
Stornoway	16,972	17,575	24,827
Tarbert	26,634	26,339	32,485
Lochmaddy	8,696	8,715	11,076
Lochboisdale	8,052	8,458	8,845
Castlebay	20,260	20,717	20,410
Bowmore	32,155	32,405	32,718
Craignure	120,944	97,124	112,380
Oban	200,033	170,354	177,368
Dunvegan	20,570	13,723	16,926
Portree	143,555	140,926	147,899
Ullapool	36,446	28,772	34,077

- 3.4 Over all these centres in the Gaelic Rings area, visitor numbers have grown by 9.5% between 2008 and 2009, although they have fallen by 2.4% between 2007 and 2009. By way of comparison, visitors to all the centres across the Argyll, Highland and Outer Hebrides areas have fallen by 0.2% between 2008 and 2009 and by 7.2% between 2007 and 2009.
- 3.5 Several reasons will have contributed to the increased visitor numbers in 2009, including:
- marketing initiatives;
  - the Road Equivalent Tariff pilot;
  - the weakness of the pound.

#### Marketing

- 3.6 VisitScotland's marketing plays an important role. As well as its accommodation guides and website, VisitScotland's domestic marketing focuses on three seasonal

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<sup>7</sup> VisitScotland. Tourism in Scotland factsheets, 2006 and 2008.

<sup>8</sup> Outer Hebrides Tourism Industry Association. Visitor survey 2009.

campaigns, all of which promote to some extent the features that might attract people to the Gaelic Rings areas. For example, the main season campaign in 2009, Perfect Day, promoted Scotland as a place with lots of things to see and do. Its key themes included walking, golf, the coast, wildlife, food and drink and adventure. Touring holidays are also widely promoted by VisitScotland, both to the domestic and the overseas market. The website [visitscotland.com](http://visitscotland.com) includes a selection of themed touring itineraries, although there is no mention of or link to the Gaelic Ring routes. There are also downloadable leaflets on areas such as the Outer Hebrides, Islay, Jura and Kintyre, Oban and Mull, and Skye and Lochalsh.

- 3.7 VisitScotland also undertakes specific promotions. For example, in 2009 a Celebrate Spring campaign focused on the Outer Hebrides. Media promotion was supplemented by direct marketing through email, directing potential visitors to special web pages. An island hopping campaign was also promoted through Real Radio Scotland, with a micro website and associated competition which attracted 1,420 online entries.
- 3.8 As well as its main website, VisitScotland maintains regional websites for different areas of Scotland. These include:
- [www.visitscottishheartlands.com](http://www.visitscottishheartlands.com) (which includes Argyll and the Islands);
  - [www.visithighlands.com](http://www.visithighlands.com);
  - [www.visithebrides.com](http://www.visithebrides.com).
- 3.9 VisitHebrides has a number of associated niche sites, including Culture Hebrides, Walk Hebrides and Wildlife Hebrides. Their content is incomplete and sometimes out of date, and they are currently being updated (largely as pages within the main VisitHebrides site). It should also be noted that the VisitScotland accommodation guides for the Outer Hebrides includes a symbol showing those establishments where Gaelic is spoken, although no link has been made to this by the Gaelic Rings.
- 3.10 A key part of VisitScotland's marketing strategy is to keep in touch with potential visitors, and information has been collected on 1.5 million consumers over the past four years. These can be used to direct appropriate email and postal communications. For example, over half a million e-newsletters are issued every month to people who have 'opted-in' to receive information. Issued in nine languages to each of the main international markets, the e-newsletters are based on themes chosen to spark interest in Scottish holidays at the right times of the year. As mentioned in 2.8 above, Cearcaill na Gàidhlig featured in one domestic VisitScotland mail drop.
- 3.11 To supplement VisitScotland's marketing, there are a number of local marketing groups in the Cearcaill na Gàidhlig area. In Argyll, groups from Bute, Cowal, Kintyre, Islay, Mull, Gigha, Mid-Argyll, Oban and Lorn have received grants through VisitScotland's challenge fund, and there are similar marketing groups in Skye and the Outer Hebrides. Individual businesses also invest in marketing, including Caledonian MacBrayne which has an extensive website promoting the use of its ferry routes and holidays using them. CalMac includes a page on the Gaelic Rings on its website and in its main "Explore" brochure.

### **Road Equivalent Tariff (RET)**

- 3.12 In October 2008 a pilot RET scheme was introduced on all existing ferry routes between the Western Isles and the Scottish mainland. RET involves setting ferry fares on the basis of the cost of travelling an equivalent distance by road, and this has led to significant reductions in fares. The pilot scheme will operate until Spring 2011.

The RET routes, which include several that form part of the Gaelic Rings, are:

- Oban – Castlebay/Lochboisdale
- Uig – Tarbert/Lochmaddy
- Ullapool – Stornoway
- Oban – Coll/Tiree

3.13 In the Outer Hebrides visitor survey mentioned above, the RET pilot was considered the most important factor in the increased business turnover in 2009. 72% of respondents identified it as very important and a further 22% as important.

3.14 The RET pilot has been monitored closely, and Halcrow<sup>9</sup> provided a progress update to the RET Stakeholder meeting on 19th January 2010. Average fares on the RET routes have fallen by around 40% for passengers and 36% for cars since the launch of the pilot and, correspondingly, there has been a substantial increase in use of all RET routes during the first year (November 2008-October 2009) compared to the same period during 2007/2008, with an overall increase of nearly 84,000 trips by passengers and around 40,000 trips by cars (plus 19% and 30% respectively).

All RET Routes	Nov 07 to Oct 08	Nov 08 to Oct 09	Change	%
Passengers	442,403	526,120	83,717	+19%
Cars	132,559	172,147	39,588	+30%

3.15 Halcrow report that both car and passenger traffic rose across non-RET routes in the Hebridean ferry network in the year November 2008 - October 2009, with a 5% increase in both car and passenger traffic compared to the year before. This suggests a modest underlying growth in island travel across western Scotland and that there has not been substantial displacement of traffic in the Hebridean ferry network as a result of the introduction of RET – more people are travelling on ferries altogether. There has been a substantial increase in motor homes carryings, in particular during the summer months (April to July) of 2009 compared to 2008, with the greatest increase on the route from Stornoway to Ullapool – although there has been an increase in motor home traffic outside the RET area as well as within it.

3.16 Monitoring of the RET pilot also involves a survey of accommodation providers, and the findings from this accord with the OHTIA survey results. Halcrow's survey has shown an extension in the opening season for many businesses between 2008 and 2009, with businesses agreeing that more visitors had come to their island since the introduction of RET. There was an increase in the numbers of businesses reporting full capacity, in particular over the summer months of 2009 relative to 2008.

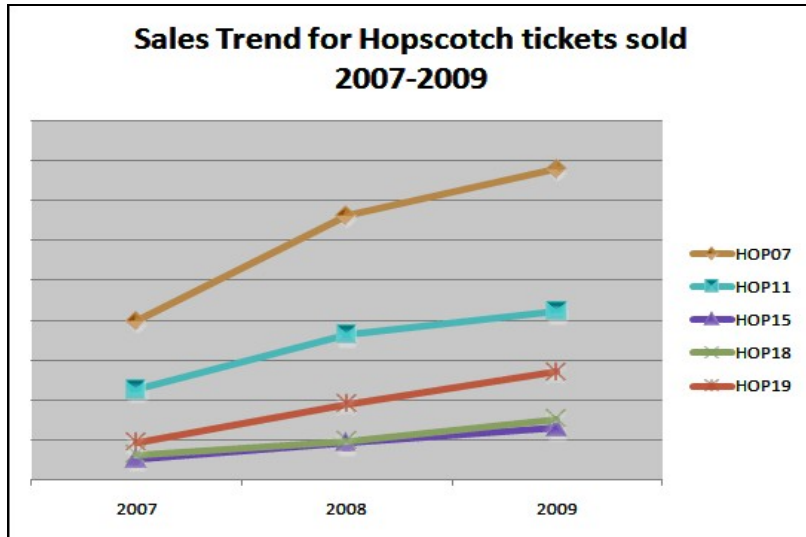
### **Cearcaill na Gàidhlig Ferry Routes**

3.17 Cearcaill na Gàidhlig is based on five CalMac Island Hopscotch routes and the ferries between the Small Isles. CalMac has been unable to release figures for Island Hopscotch ticket sales but has provided the following graph to illustrate how sales have moved over the project period:

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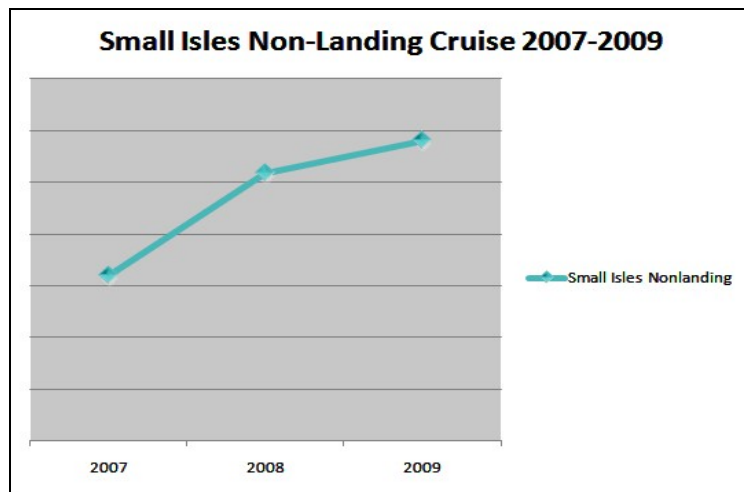
<sup>9</sup> Halcrow Group. 2010. RET - stakeholder progress update, 13 January 2010.





3.18 As can be seen, sales on all five Island Hopscotch routes have increased over the period 2007 to 2009. The lowest growth was in Route 15, which was introduced as a Gaelic Ring in 2007. The other four routes were introduced as Gaelic Rings in 2008 and while sales have grown, there was already a rising trend.

3.19 CalMac has also provided a graph of sales of tickets for its cruise around the Small Isles:



3.20 The Small Isles Gaelic Ring was introduced in 2008, and although there was an increase in ticket sales in the year to 2009 this was less than the increase in the previous year.

3.21 Passenger carrying figures for all the routes involved in Gaelic Rings are shown in Appendix 1. The data available from CalMac does not, however, always allow for analysis of the specific routes involved: for example, passenger numbers are for sailings both ways on a route (eg Stornoway to Ullapool and Ullapool to Stornoway), the passenger figures for Uig to Lochmaddy and Uig to Tarbert (and the return journeys) are combined and no figures are given for passengers who broke their journey on the Small Isles route.

## Gaelic Language and Culture

- 3.22 VisitScotland has carried out a survey of TIC users in the Western Isles over a number of years. While the survey has some limitations, especially in its representation of the full range of visitors to the islands, it does give an appropriate guide to trends. The survey includes a question on visitors' interest in the Gaelic language and culture, and the responses over the survey period have been as follows:

<b>Western Isles TIC survey: Are you interested in the Gaelic language and culture?</b>									
	<b>1996</b>	<b>1998</b>	<b>2000</b>	<b>2002</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>
Yes	87.8	86.8	80.8	80.3	74.7	77.8	73.0	79.2	67.3
No	10.8	11.9	15.1	11.8	17.0	16.7	18.4	14.5	21.9
No response	1.5	1.3	4.1	7.9	8.3	5.5	8.5	6.3	10.4
Source: Macpherson Research. VisitScotland: Hebrides TIC Visitor Survey 2008.									

- 3.23 The TIC visitor survey also covers the sources of information which influence visits.

<b>Western Isles TIC survey: Which of the following, if any, influenced your decision?</b>						
	<b>1999</b>	<b>2000</b>	<b>2002</b>	<b>2004</b>	<b>2006 / 07</b>	<b>2008</b>
A previous visit	35.7	36.4	38.8	37.4	38.4	33.1
Advice from friends or relatives	26.9	27.8	28.9	29.7	31.5	26.5
Tourist Board Brochure	13.7	12.2	14.7	11.3	10.3	11.2
Visit Hebrides Website			8.7	11.6	12.2	0.8
Guide book	13.5	15.3	12.8	10.7	10.1	5.4
Newspaper / magazine article / advert	7.7	6.6	5.8	7.0	5.2	5.4
Other Internet site			6.4	6.1	8.9	0.4
Radio / TV programme	6.5	6.3	6.7	7.2	5.6	10.0
Travel agent	0.6	0.6	0.9	0.9	0.9	8.1
Tourist Office elsewhere	1.0	1.2	0.8	1.2	0.7	1.2
Source: Macpherson Research. VisitScotland: Hebrides TIC Visitor Survey 2008.						

- 3.24 The findings of the survey from year to year are erratic due to small samples, but allowing for anomalies, the survey suggests that the type of marketing undertaken for the Gaelic Rings – the website, features in print, use of radio and partnerships with the travel trade – could influence a fair proportion of potential visitors. It seems likely that the strong variations in 2008 are affected by the type of visitor filling in the survey (eg more visitors as part of bus tours) but the growth in people using travel agents may show the potential for packages featuring the Gaelic Ring routes.

## Conclusions

- 3.25 Since the introduction of the Gaelic Rings in 2007, the number of visitors to the area has increased, accommodation providers are busier, the numbers of passengers carried on ferries to the islands involved in the Gaelic Ring routes have grown and more Island Hopping tickets have been sold. The Gaelic Rings is promoting an aspect of island life which is of interest to the majority of visitors to the area and it is using appropriate means of marketing to reach them. Nevertheless, a number of major influences underlie the recent growth in tourism in the area, and further

investigation was carried out to try to distinguish the specific impacts of the Gaelic Rings initiative.

## **4. CONSULTATION**

4.1 In this section and in section 5 we report on the feedback we received from:

- telephone interviews with stakeholders;
- telephone interviews with potential partners and other interested parties;
- an online survey of businesses listed as partners on the Cearcaill na Gàidhlig website;
- follow up telephone interviews with a number of these businesses and additional businesses.

### **Stakeholder and Partner Consultation**

4.2 The aspects of the initiative covered during the interviews included: general impression of the Gaelic Rings; the website; cultural tourism; Gaelic language; feedback received on the journeys; and development potential.

### **General Impressions of the Initiative**

4.3 The initiative was generally regarded by those we interviewed as imaginative and innovative, aimed at linking the commercial and Gaelic sectors. The ability of Cearcaill na Gàidhlig to integrate tourism, transport and Gaelic development was seen as its real strength. Highlighting the area's Gaelic language and culture to add value to the visitor experience is considered a unique selling point of the Gaelic Rings.

4.4 While this may have immediate resonance for a core of Gaelic aficionados, it was considered of less immediate appeal to the more general visitor. As it stands, Cearcaill na Gàidhlig is more of a concept than a product – it is presenting an idea of the area as different from other parts of the UK, with a unique language, culture and history which is worth exploring. Getting this concept into the minds of the general visitor was regarded as a long term venture, requiring continuing investment. Alongside that, a need was identified for the infrastructure to be developed to ensure that visitors are able to access the special aspects of the area more easily. Some respondents thought that shorter term benefits could be achieved by targeting Gaelic speakers and learners rather than the generic marketing approach taken to date. The need for the initiative to fit with the overall marketing strategies of the different partners – public and private – was highlighted as a challenge.

### **Website**

4.5 Respondents generally thought that the website is a good starting point. It is fairly well laid out with good images and draws you into the area. Improvements suggested included introducing opportunities for interactivity and refreshing the look of the site, particularly the text about the people and places. Whilst the website puts over a good impression of the landscape and scenery, more could be done to make the information on Gaelic language and culture contemporary and inviting and to show that a Gaelic Rings style holiday would be fun. Other suggestions for improvement included enabling and encouraging visitors to share their 'Gaelic Rings' experiences (good and bad); more home-printer friendly downloads (i.e. less colour); an improved 'business' search function, with links; and much more information on things to do and see, such as an events guide or links to other relevant sites.

- 4.6 Some consultees would not be keen for the Gaelic Rings website to compete for advertising income from accommodation and activity providers – although it was considered important for the consumer to more easily convert an interest in the concept into a decision to visit the area.

#### **Does the Initiative Help Boost Cultural Tourism?**

- 4.7 The general feeling of respondents was that the initiative was visible and had probably helped boost cultural tourism, raising awareness of potential itineraries and Gaelic culture. It was recognised that Cearcaill na Gàidhlig is a long term project, but some stakeholders now wish to see an increased focus on outputs to justify continued investment.
- 4.8 For this study, VisitScotland carried out a poll of its Visitor Information Centres on the Gaelic Ring routes, asking for an estimate of the number of visitors using their service who were actively following a Gaelic Ring. Only three of the centres responded positively, giving a total of around 40 visitors (Castlebay 21 plus visitors, Lochmaddy 11-20 and Craigmore 1-3). Three responded that no visitors had mentioned a Gaelic Ring and the other seven didn't respond – indicating that numbers on Gaelic Rings are unlikely to have been high. This partial evidence, nevertheless, suggests that the Gaelic Rings have had some success in bringing visitors to the area.
- 4.9 There were differing views on the types of visitor that Cearcaill na Gàidhlig should be targeting. Some stakeholders thought that international visitors are a big market that could be tapped; another emphasised the importance of targeting people on the doorstep, in Glasgow for example, who had never visited the islands and did not realise how accessible they are; another thought that there was a need to move away from local marketing to a wider and broader market. The potential for targeting those with a specific interest in the Gaelic language was also recognised.

#### **Does the Initiative Help Boost the Gaelic Language?**

- 4.10 One respondent commented on an assessment in the Scotsman newspaper, which rated Cearcaill na Gàidhlig as one of the best initiatives for broadening and diversifying Gaelic language in an imaginative way. Another thought that the initiative provided additional positive 'exposure' to the language and has raised the 'profile' of the language. One respondent thought that an opportunity exists to enhance the project by offering Ulpan lessons, helping visitors to learn some of the language and so improving their experience. Another respondent felt that, while it was certainly appropriate to market the initiative to those who speak or are learning Gaelic, the initiative should be more about culture and music than the language, which is too narrow a focus. There was also a view that there was too much focus on Gaelic for the general market – the links with Gaelic were presented too strongly and there was some confusion among potential visitors as to whether you need to speak Gaelic to take part in a Gaelic Ring.
- 4.11 In practice, the potential of the Gaelic Rings as they are to help increase the number of Gaelic speakers was regarded as limited. What Cearcaill na Gàidhlig can do is to boost the visibility of Gaelic, and the work done through signposting and publicity material was recognised. Cearcaill na Gàidhlig also shows tourism operators that Gaelic can be a positive aspect of their marketing and an attraction for people to patronise their businesses. In doing that, the project can raise the confidence of Gaelic speakers to use the language when speaking to visitors. The Gaelic in your Business leaflet was a start in encouraging this link between tourism operators and the language, but more would need to be done to build on that.

## Feedback About the Journeys

- 4.12 Other than the VisitScotland VIC poll, none of those consulted were able to provide any feedback about people basing their holiday on a Gaelic Ring. However, positive comments were put forward on how the visitor experience could be improved, such as:
- Authors, singers, musicians could be on the ferry to share stories and songs (e.g. ‘songs of the sea’);
  - Use touch-screen technology onboard to show island life, past and present as a ‘taster’ to the visitor’s arrival;
  - Link to other initiatives, such as archival sources like Am Baile [www.ambaile.org.uk](http://www.ambaile.org.uk);
  - Poster displays on ferries;
  - ‘Journey’ focal points on the islands, e.g. local heritage centres, personal connections to the people of the island, how folk lived, etc;
  - Encourage return visits – come back here and hear, and speak Gaelic; see more of the heritage, buildings, landscape and how people lived.

## Development Potential

- 4.13 Most respondents saw the potential for further development of the initiative, with ideas such as an updated book, including more details of the journeys themselves. It was suggested that BBC Alba could become involved and also that Cearcaill na Gàidhlig should link with local Mods to encourage visitors to come and experience that particular element of Gaelic culture. It was felt that any future development should benefit local people as the end point in an exciting and informative journey using a variety of integrated ferry/rail/car means of transport. The potential for a revamped Gaelic Rings to play a major role in the Scotland’s Islands initiative was also raised.
- 4.14 There were differing views on the development of further routes. Some respondents suggested that there was a need to focus on developing the concept, how it is delivered and the relationship between partners. They felt that fewer trails would allow more focus on ensuring that suitable activities and infrastructure are developed locally to support the project. Others proposed further development, mentioning additional places that could be incorporated into the current itineraries, new routes that could be introduced (e.g. Arran, or even inland areas, coast to coast, such as the Great Glen, Argyll and other Gaelic speaking areas) or linking with Slí Cholmcille – the Columban Heritage Trail.

## Conclusions

- 4.15 The feedback from the consultations was generally positive, although it focused on the supply side and little information was available on actual demand from consumers for the Gaelic Rings, how well the routes have been received and the degree of take up. Consultees generally:
- Are positive on synergies between transport, tourism and Gaelic development;
  - Are positive about the quality of the promotional materials produced;

- Regard the Gaelic Rings as a long term investment – taking time to build a concept;
- Believe there should be closer links with partner businesses to build the provision for visitors following a Gaelic Ring;
- Have differing views on whether the number of Rings should grow, stay the same or be reduced;
- Have differing views on the markets that should be targeted;
- Now wish to see an increased focus on outputs in order to justify continued investment.

4.16 These points are addressed further in the final section of this report where we provide recommendations for the development of Cearcaill na Gàidhlig.

## 5. BUSINESS SURVEY

- 5.1 An online survey was made available to 144 selected businesses listed on the Cearcaill na Gàidhlig website and who had received marketing materials relating to the initiative.
- 5.2 22 businesses responded to the survey (15% of surveyed businesses). To supplement the response, a number of businesses were contacted by telephone and this added a further 11 businesses to the total. Therefore, an overall survey response of 33 businesses (23%) was achieved. In addition, the formal survey was supplemented by telephone follow up with some respondents to clarify and augment their response.
- 5.3 The survey asked respondents a range of questions about their business, use of Gaelic Rings marketing material, awareness of Cearcaill na Gàidhlig marketing activity, interest in Gaelic development, involvement in the initiative, its impact, and their thoughts about future development. Responses are summarised below, with more statistical detail provided in Appendix 2.
- 5.4 Businesses that responded to the online survey and follow-up telephone survey were from a range of the different sectors that Cearcaill na Gàidhlig had approached as partners. The breakdown was as shown below. Eight businesses fell into more than one category.

<b>Business sector</b>	
Accommodation	21
Activity Provider	2
Attraction	2
Catering	3
Leisure	3
Retail	1
Travel	4
Other	7

- 5.5 Responses were well spread across the Gaelic Ring areas:

<b>Business location</b>	
Argyll	4
Barra	7
Benbecula	2
Glasgow	1
Harris	1
Lewis	4
Lochaber	2
North Uist	5
Perth	1
Skye	3
South Uist	3



5.6 Businesses first received information about Cearcaill na Gàidhlig as follows:

Year	
2007	11
2008	8
2009	2
No response	12

### Marketing Activity

- 5.7 50% of respondents indicated that they did not use the supplied marketing material. 37% indicated that they had used it a little and 13% indicated that they had used it a lot.
- 5.8 The Gaelic Rings leaflets, stickers and guide book were the marketing materials most used by respondents to the survey, while the website **Error! Hyperlink reference not valid.** was least used, closely followed by the 'Gaelic in Your Business' publication.
- 5.9 Comments received from businesses showed a lack of awareness of Cearcaill na Gàidhlig and what it is trying to achieve. Businesses generally were putting out the Gaelic Rings materials with any other leaflets they received for visitors to pick up if interested. Those who did use the materials were appreciative of its quality and its interest for visitors.
- 5.10 This lack of awareness also extended to the advertising and marketing carried out by Cearcaill na Gàidhlig during 2009. Only 9% of the businesses that responded indicated that this marketing was quite or very effective in supporting or developing their business. 91% of businesses rated the marketing as either not effective or having only a 'limited positive effect'.
- 5.11 The most effective marketing initiative was thought to be the Gaelic Rings leaflets and CalMac's 'Explore' promotion; while the most ineffective were the posters, the DVD on YouTube, the advertorial on Classic FM, the online promotion and holiday competition, the Flybe seat pocket leaflets, and the 'Aurora' in-flight magazine promotion.
- 5.12 However, the comments showed that in most cases those businesses saying that the marketing was ineffective were simply not aware of the activity which took place. Campaigns outside the local area were the least likely for businesses to be aware of and, in the absence of visitors specifically mentioning an advert or promotion when booking, these were generally regarded as ineffective.

### Gaelic Language and Culture

- 5.13 68% of the businesses that responded said their business was quite or very interested in cultural or Gaelic-related tourism activity, with 32% expressing minimal or no interest.
- 5.14 The majority of businesses generally supported the principles behind the initiative and a number of businesses are actively involved in Gaelic projects and support the Gaelic language and culture as much as possible. However there was also a view that the Gaelic language and culture is not a draw and some businesses indicated that, not being Gaelic speakers, they have difficulty promoting the language. Some businesses indicated that they have found it difficult to recruit Gaelic speaking staff.

- 5.15 52% of businesses rated their tourist customers as quite or very interested in Gaelic language and culture, with 48% rating interest at best minimal.
- 5.16 Comments received suggested that while some guests are very interested in the Gaelic language, an interest in the wider culture is more prevalent. Gaelic was regarded as an area for growth, with greater interaction by the initiative with business required. Negative comments were also received, questioning the relevance of Gaelic to the visitor.
- 5.17 Businesses were asked if their involvement in Cearcaill na Gàidhlig encouraged them to extend their use of the Gaelic language or enhance the Gaelic and cultural experiences they offer. From the comments received, it would appear that the majority felt that it had not led them to extend their use of the Gaelic language. However, businesses did mention increased use of the language on their website, bilingual signs and the need to encourage visitors to attend locally arranged cultural events. The need for more Gaelic speaking staff / hoteliers was also raised.

### **Impact of Gaelic Rings on the Business**

- 5.18 Businesses were asked how they had incorporated the marketing concept of the Gaelic Rings into the marketing of their business. Most had not, although a few had, for example, mentioned it on their website. Those who had done this would appreciate closer partnership working. In particular, tour operators who had featured Cearcaill na Gàidhlig on their websites had designed specific Gaelic Rings tours which they marketed to their clients through e-newsletters etc and they saw real opportunities if closer links could be developed.
- 5.19 The majority (55%) of businesses that responded said they saw no benefit from their involvement with the Cearcaill na Gàidhlig initiative, 29% little benefit, and 16% some benefit. 95% of businesses indicated that they had observed no or little economic impact on their business from involvement in the initiative. Nevertheless, 90% of businesses indicated they would be likely to continue to support and commit to the initiative.
- 5.20 Comments received from businesses suggested that while Cearcaill na Gàidhlig has, to date, had little impact on the majority of businesses, many believe there is potential for greater impact through closer links between Cearcaill na Gàidhlig and local businesses. The need for consultation, closer engagement and improved communications was highlighted.

### **Feedback from Visitors**

- 5.21 73% of the businesses that responded to the survey said no customers mentioned the Gaelic Rings as a motivation for their visit to the area, while 18% said that not many had done so. Only three respondents said that quite a few customers had mentioned the Gaelic Rings. Following up these questions by telephone, a clearer picture emerged of relatively few visitors mentioning the Gaelic Rings unprompted; although the publicity materials provide a focus for discussion between businesses and those visitors who have a more general interest in Gaelic culture and history.
- 5.22 Businesses were asked if they knew, from feedback they might have received from visitors, how much difference this initiative made to their itineraries and to their enjoyment of their holiday. 6% indicated that Cearcaill na Gàidhlig had made a significant difference to a significant number of visitors' itineraries. With regard to enjoyment, 11% said Cearcaill na Gàidhlig made a small difference to a large number, with 5% indicating a significant difference to a significant number.

5.23 One business commented:

*'I think the project does well to personalise the individual journeys and offers tourists an insight into those journeys from a more local perspective. This gives them a little taste of the journey and the area that they might otherwise have been unaware of or not have found for themselves'.*

5.24 We also asked businesses if they knew how their visitors who mentioned the Gaelic Rings had travelled. 82% indicated that visitors had travelled either by their own vehicle or a hired car, with 18% travelling by public transport or other means.

### **Future Development of the Cearcaill na Gàidhlig Initiative**

5.25 Businesses were asked if they could suggest how Cearcaill na Gàidhlig could be developed in the future. Comments focussed on better communication and more engagement with individual businesses. Other points included the need to encourage more Gaelic speakers into the tourism industry while tour operators wanted the initiative to lead to more concrete opportunities.

5.26 From the visitor's perspective, business respondents focussed on improvements which would make it easier for the visitor both to undertake the trip and to experience Gaelic language and culture. Giving people the confidence to tour the remote islands was considered important, as well as persuading Gaelic speakers to use the language more [in a tourism-orientated setting] and promoting the Gaelic related activity that goes on all year round.

5.27 One business gave the following comment:

*'The importance of Gàidhlig to the overall experience of tourists coming to the Western Isles should not be under-estimated. It is one of the things that makes this part of Scotland unique and must be grasped (along with many other unique selling points) to help market our beautiful part of Scotland to people who want a unique experience while on their holiday. This includes hearing and seeing the language, music and customs of the local area as well as enjoying its beauty'.*

### **Conclusions**

5.28 The overall conclusions from the online survey and follow-up telephone discussions were that:

- Although considerable effort went into signing up businesses, relationships have yet to be developed to create a sense of partnership. Not all of the participating businesses are supportive of Gaelic development;
- Businesses as yet can identify little direct economic benefit from Gaelic Rings in terms of increased visitor numbers or length of stay;
- Cearcaill na Gàidhlig is mostly seen as a source of good quality leaflets to pass on to their customers;
- There is goodwill from the majority of businesses towards Gaelic language and culture, and there are opportunities to work more closely with these businesses.

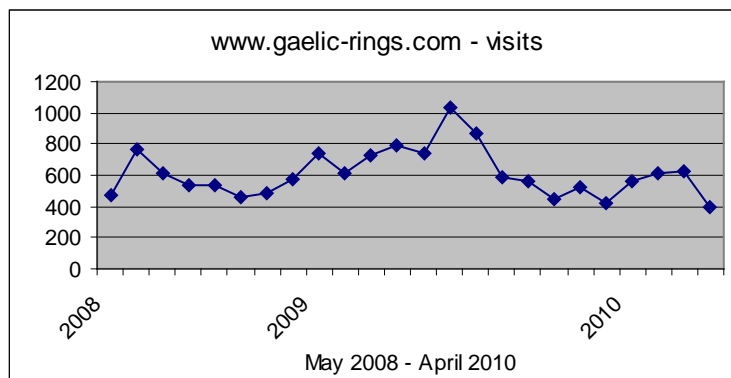
## 6. WEBSITE

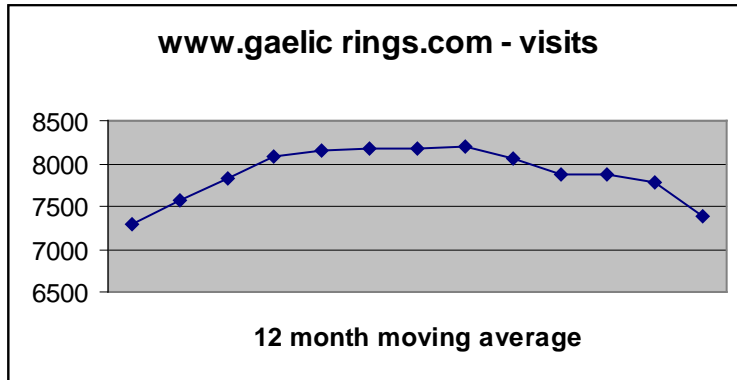
### Web Traffic

- 6.1 Following the pilot year, the Gaelic Rings website, [www.gaelic-rings.com](http://www.gaelic-rings.com), was redesigned and relaunched on 20<sup>th</sup> May 2008. Since then the headline statistics for use of the website are:

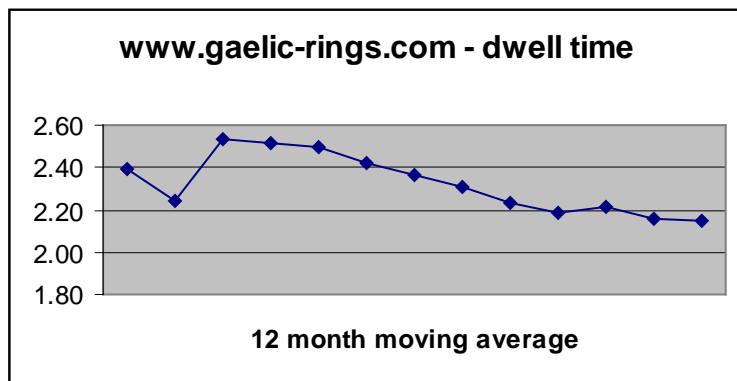
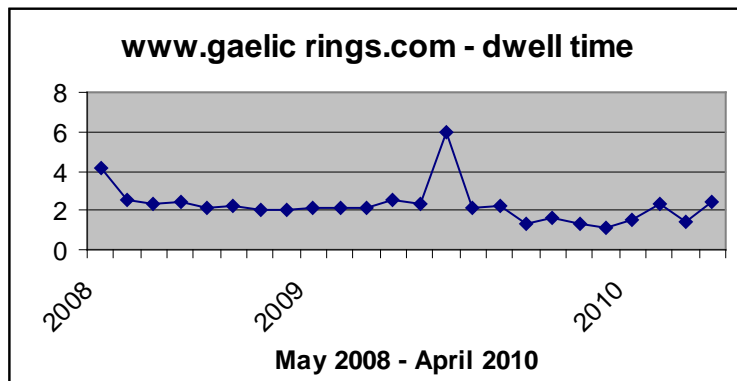
Visits:	13,970
Visitors:	11,901
Page Views:	52,981
Page views per visit:	3.8
Avg. Time:	2.35 mins
New Visits:	85%
Repeat Visits:	15%
Countries:	93

- 6.2 This is equivalent to around 20 visits per day over the initial 22 month period. As a comparison, when it was first launched in 2002/2003, VisitHebrides.com was receiving 170 visits per day and the associated niche site CultureHebrides.com was receiving around 33 visits per day. In the period May 2008 to March 2010 VisitHebrides received over 200,000 visits, with over 1,200,000 page views, and CultureHebrides still received 23,000 visits and 79,000 page views, despite being superseded by pages within the VisitHebrides site. VisitHebrides is the VisitScotland website for the Outer Hebrides and as such would be expected to attract a large proportion of the relevant web traffic. As a niche site aimed at potential visitors with an interest in the local culture, CultureHebrides would be likely to attract a similar visitor profile to Cearcaill na Gàidhlig.
- 6.3 Since the relaunch of the Gaelic Rings website in May 2008, the number of visits in a month peaked at 1,031 in June 2009, but use in the first quarter of 2010 was below the equivalent period in 2009. The moving average, which smooths out seasonal variations by charting total use over 12 month periods (May to April, June to May, July to June, etc) shows a peak in 2009, with visits falling off thereafter.





6.4 Dwell time on the website also peaked in June 2009 when the average visitor spent just over 6 minutes on the site. Since then, dwell time has fallen below the overall average of 2.35 minutes as shown in the moving average chart below.



6.5 In conclusion, there has not been sustained growth in either the traffic to or the dwell time on gaelic-rings.com and the total number of pages viewed and the number of pages viewed per visit are currently relatively low.

6.6 The majority of visits to the site (55%) have been through search engines (overwhelmingly Google). By far the most likely keywords used in the search were “Gaelic rings”, which suggests that the website was accessed largely by people who were already aware of its existence. A search on Google using the keywords “touring Scotland’s islands” does not bring up a link to the Gaelic Rings in the first few pages of results. Adding the word “Gaelic” brings up the link to the Gaelic Rings pages on the CalMac site on the first page and a link from Hebridean Hopscotch on the second. Encouragingly, the second most common source of traffic to the website after Google was through the CalMac site, but the number of visitors clicking through from VisitHebrides is lower than might have been expected.

### **Web Content**

6.7 The Gaelic Rings website contains a homepage and sections on:

- The Gaelic Rings – descriptions, images and downloadable leaflets on each of the six itineraries;
- Gaelic journeys – each of the journeys (which make up the Gaelic Rings book) are available to download in English and Gaelic;
- History of Gaelic – a short description of the roots of the language;
- Gaelic language – a description of the development of Gaelic to the present day;
- Businesses – an alphabetical listing of the partner businesses, giving their address, area and phone number. The listing is searchable by sector but not geographically;
- Our partners – logos and links to the main partners in the initiative;
- Travel – links to CalMac, Flybe and Highland Airways and to various travel planning sites such as Travel Line Scotland;
- Contact us – a form to submit questions.

6.8 The homepage is the most visited, and it is available in 12 languages. It includes an invitation to enter a competition by submitting information on a journey along with photographs (the closing date was October 2009) and to subscribe to a newsletter. Creative Cell report that there were no entries to the competition and that 250 people have signed up to receive further information.

6.9 These have been the only opportunities for user interaction on the website and even then the photographs for the competition had to be submitted through email. There are significant opportunities to develop this aspect of the website through inviting users to upload information, to pass on hints, tips or recommendations, or to say what a great experience they had.

6.10 There are also opportunities to upgrade the business area, which is currently a straightforward alphabetical listing with no general indication as to what the visitor might expect from them. Improvements could include, for example, categorisation of businesses by route, price banding and facilities offered by accommodation providers, what there is to do and see at attractions and links to business’s own websites.

6.11 The travel page provides useful links for the independent traveller to the CalMac and airline websites. Apart from the business listings, these are the only way for the potential visitor to convert any interest in taking a holiday using the Gaelic Rings into an actual booking. Partnerships have been sought with companies such as Hebridean Hopscotch, McKinlay Kidd and McLean Scotland, all of whom offer ready made or tailored holidays to the Scottish islands and all of whom feature the Gaelic Rings on their websites, and conversion rates could be strengthened by giving information on their services and linking to their sites. For the independent traveller, a link to VisitScotland or to local destination marketing sites would help in finding accommodation or to make a holiday based on a Gaelic Ring easy to arrange.

6.12 The leaflets on the various Gaelic Ring routes tell the potential visitor:

*For a list of accommodation providers throughout the Hebridean Islands and West Highland mainland, visit [www.gaelic-rings.com](http://www.gaelic-rings.com). Please note that it is advisable to have booked accommodation before commencing your journey.*

Improvements such as those suggested would help facilitate this.

6.13 Also, the site could be improved by providing information on the events taking place in the Gaelic Ring areas. We understand that there was an intention to create an events guide, perhaps in association with HI Arts. Given that the VisitScotland annual accommodation guides are printed with a basic events listing, it should be possible to give some indication of events available to the Gaelic Rings visitor at different times of year. Many events are firmly based in Gaelic language and culture and so would be attractive to potential visitors.

## **Conclusions**

6.14 The website is relatively attractive, with good images and descriptions. However, it is a static site and needs to be refreshed to enable inter-activity and relationships to be built with users. The high quality of the materials available for download makes them expensive to print and, other than buying the book, there is no facility to request printed material to be sent by post.

6.15 The site aims to inspire interest in Gaelic and the places along the Gaelic Rings journeys. The text may be appropriate to those with a keen interest in the history of the area, but it is less likely to appeal to the general visitor. The site could be made more inspiring for the general visitor, for example, through demonstrating how to say some Gaelic words or by integrating wider Gaelic music and culture to show how enjoyable a holiday in that world would be. It is important to show that the Gaelic language is alive today, rather than a historical curiosity, and, for the keen browser, some indication as to how they might take an interest in Gaelic forward would also be useful.

6.16 The site offers some possible itineraries with information on what visitors might see en route and its historic context, but it could be improved by giving more information to those who are inspired to visit the area on the practicalities of their visit.

## 7. OTHER MARKETING ACTIVITY

- 7.1 As well as the website, Cearcaill na Gàidhlig has invested in a range of marketing materials and activity, including:
- Signing up business partners;
  - Producing leaflets;
  - Producing stickers and other promotional material;
  - Producing the Gaelic Rings book;
  - A Gaelic in your Business publication;
  - Cearcaill na Gàidhlig signage at selected railway stations;
  - Encouragement of travel features on Cearcaill na Gàidhlig;
  - Participation in promotions through partners such as CalMac, VisitScotland and tour operators;
  - A Classic FM advertising campaign.
- 7.2 10,000 copies of the Gaelic Rings guide book were produced, and sales of the book were identified as a key measurement for the project. General distribution and marketing of the book is through the Gaelic Books Council and, to date, 297 copies have been sold. In addition, CalMac took 2,000 for sale through their outlets, and we understand that 160 of these have been sold.
- 7.3 The radio promotion was carried out with Classic FM Scotland and Classic FM Ireland, which between them have 450,000 listeners. 60 second advertorials directed listeners online to the Classic FM website for more information and for a chance to win one of three Gaelic Rings trips. There were 7,861 entries to the competition, with 1,999 entrants asking for more information on the Gaelic Rings. Each of those was sent a letter along with a copy of the Gaelic Rings DVD.
- 7.4 To put that in context, VisitScotland promoted an Island Hopping campaign through Real Radio Scotland which has a reach of 750,000 listeners. They received 3,900 texted and 1,420 online entries to their competition and the online micro-site received 8,600 visits. By comparison, the Cearcaill na Gàidhlig campaign was relatively successful in reaching and engaging with its audience. The next step is for Cearcaill na Gàidhlig to use such activity to help build a database of potential visitors and to keep in touch with them.
- 7.5 Improving the information held on partner businesses would also be beneficial and aid communication. For example, business email addresses would allow partners to be readily informed about the initiative and what it is doing. This would help to build a sense of partnership and also allow two way communication – for example to request more leaflets mid-season or to provide information on Gaelic development opportunities which might be of interest to the trade, such as opportunities to improve signage through Comunn na Gàidhlig's grants scheme. It would also make it easier to monitor the success of activity.



## **8. ACHIEVEMENT OF OBJECTIVES**

8.1 The objectives of Cearcaill na Gàidhlig have been to:

- Boost cultural tourism and Gaelic language related activity;
- Develop and demonstrate the links between the core Gaelic speaking areas of the Western Highlands and Islands;
- Demonstrate the accessibility of the Highlands and Islands and the integrated transport connections within the area;
- Ensure that the improvements in transport infrastructure are utilised to boost cultural tourism and Gaelic language related visitor activity;
- Offer a linguistic and culturally rich experience for tourists;
- Offer a new and locally innovative marketing solution to businesses undertaking cultural or Gaelic-related activity;
- Encourage businesses in the tourism industry to enhance the Gaelic and cultural experiences they offer.

8.2 From our research, consultation and analysis of the limited data available, we comment as follows on progress in achieving these objectives.

### **Boost Cultural Tourism and Gaelic Language Related Activity**

8.3 Cearcaill na Gàidhlig has had some effect on cultural tourism, providing high quality materials which can give the visitor an idea of the culture and heritage of the area. Our work would suggest that making this material available has been found useful by some of the tourism businesses in the area and some feel that it has enhanced their visitors' experience. However, a significant number suggest that a more focussed approach would be beneficial, ensuring that those businesses that buy into the idea receive the support they need. Cearcaill na Gàidhlig has also contributed to making Gaelic more visible in the area, for example through signposting at railway stations, although there are opportunities to develop this further by enhancing the links with Gaelic development organisations to show how what they are doing could relate to the Gaelic Rings. The Gaelic Rings itself does not have the funding to progress Gaelic language development, but if it is successful will boost demand for Gaelic language and cultural activity that would help its own viability and build confidence.

### **Develop and Demonstrate the Links between the Core Gaelic Speaking Areas of the Western Highlands and Islands**

8.4 Cearcaill na Gàidhlig has demonstrated the links between the different places that make up a Ring and showed that there is a story that can be followed as a worthwhile visitor journey. Encouraging more business-to-business links between areas would help to convert this into rewarding visits (and hence repeat visits and recommendations).

### **Demonstrate the Accessibility of the Highlands and Islands and the Integrated Transport Connections within the Area**

- 8.5 Gaelic Ring routes are based on CalMac's Island Hopscotch routes and show how those routes are more than random ferry journeys. Currently, however, the Rings are firmly based on ferry routes and there is little emphasis on how integrated transport connections can make the islands accessible to those without a car (other than references to other websites and transport providers). The leaflets on the journeys are largely written for car drivers and no mention is made of public transport. This could be addressed by integrating a journey planner into the website and enabling people to feed their own experiences of travelling the Gaelic Rings onto the website.

### **Ensure that the Improvements in Transport Infrastructure are Utilised to Boost Cultural Tourism and Gaelic Language Related Visitor Activity**

- 8.6 It is not clear how Cearcaill na Gàidhlig has set about achieving this objective other than through its existence and promotion. For example there is little information in its website or marketing material on the transport infrastructure.

### **Offer a Linguistic and Culturally Rich Experience for Tourists**

- 8.7 Cearcaill na Gàidhlig has provided a framework for others to provide tourist experiences. Although it has developed a large group of business partners, it has not, however, done enough to ensure that they have bought into the Cearcaill na Gàidhlig concept and that they understand how they can enhance the visitor's experience through promoting Gaelic language and culture. One bed and breakfast owner we spoke to described how she used the short Gaelic glossary in the leaflet to teach interested customers a few words of the language, but this was an exception. Others told us how they try to point visitors to Gaelic events, music and attractions that might be of interest. This aspect of Cearcaill na Gàidhlig could be further developed. For example, Pròiseact nan Ealan told us about their storytelling projects and the potential to develop their location based storytelling – stories based on a particular location (such as Uig beach) – which are available on a hand-held ipaq or could be converted to podcasts for dissemination through the Gaelic Rings website. Also, Ceilidh Trails organised through the fèisean movement in large parts of the Gaelic Ring area could be promoted to the visitor who might not otherwise be aware of them. Further investigation of how the HI-Arts events database might be integrated into the site would be worthwhile, as would consideration of some joint working with Culture Hebrides.

### **Offer a New and Locally Innovative Marketing Solution to Businesses Undertaking Cultural or Gaelic-Related Activity**

- 8.8 Few businesses have taken up the opportunity to link their marketing to Cearcaill na Gàidhlig. Partly this is because of how the initiative has been set up. The website, for example, provides only basic details of its business partners and there is no facility to buy a holiday from the partners. The site is aimed at the independent traveller who is then expected to research the different elements of a holiday in other ways. As we discovered in the survey, individual businesses are likely to be more interested in what brought a visitor to their establishment than what inspired a visitor to come to the area at all. Those tour operators who have bought into Cearcaill na Gàidhlig have largely been disappointed that, while they are featuring it in their marketing, there is no reciprocal description of the services they can offer on the Gaelic Rings site. Improved linkages and a section on How to Book a Gaelic Ring Holiday would create a more rounded marketing solution. It would also allow businesses to identify customers coming to them through the Cearcaill na Gàidhlig website.

## **Encourage Businesses in the Tourism Industry to Enhance the Gaelic and Cultural Experiences they Offer**

- 8.9 Cearcaill na Gàidhlig has produced and circulated a Gaelic in Your Business leaflet, but this has not been followed up with any further material or contact. As mentioned earlier, Cearcaill na Gàidhlig is a concept, and it is as difficult to sell a concept to potential partners as it is to the end consumer. While a number of business respondents to the survey were responsive to the role of Gaelic in attracting visitors, few seem to have enhanced their product as a direct result of the Gaelic Rings initiative. Again, this is a long term ambition and more focussed work is required to deliver against this objective. It may be that Cearcaill na Gàidhlig should be more selective in the business partners it promotes through its website and work with them to find ways to enhance the Gaelic experience.

### **Economic Impact**

- 8.10 Quantifying the economic impact of Cearcaill na Gàidhlig to date is difficult. Cearcaill na Gàidhlig does not directly sell anything, other than the Gaelic Rings book, and its impact is through increasing the turnover of other businesses. As we note in Section 3 above, the sales of Island Hopscotch tickets and the numbers of visitors to the Gaelic Rings area have risen since the Cearcaill na Gàidhlig initiative began, but there are multiple reasons for this, and identifying the extent to which the Gaelic Rings is responsible for growth is not easy.
- 8.11 Cearcaill na Gàidhlig could generate economic impact by attracting visitors to the area who would otherwise not have come or by encouraging existing visitors to the area to extend their stay or to spend more while on their visit. Also, by helping to make visits more enjoyable, it would be expected to lead to stronger recommendations to friends and family (the motivation for over 25% of visits to the Outer Hebrides).
- 8.12 The evidence currently available to put numbers against the visitors who have been attracted to the area because of the Gaelic Rings is slight. The poll of VIC staff suggested they had talked to around 40 who were actively following a Gaelic Ring. The survey of businesses suggested that only a few of their guests mentioned the Gaelic Rings during their stay. Our conclusion is that the economic impact to date will have been very small, though there are opportunities to increase this (and more easily identify it) in the future.

### **Conclusions**

- 8.13 The objectives set for Cearcaill na Gàidhlig are ambitious for an initiative with an average annual budget over its first three years of around £100,000 (including set up costs). While there have been some achievements in delivering some of the initiative's objectives, it is perhaps not surprising that, overall, the degree of success appears to have been limited. The objectives are arguably too ambitious and wide ranging, and we suggest in Section 9 below that they should be refocused towards more deliverable and measurable outcomes.

## **9. RECOMMENDATIONS**

9.1 We would suggest that to move forward Cearcaill na Gàidhlig should:

- Refocus its objectives;
- Focus on target groups;
- Define and build product;
- Build effective partnerships;
- Develop relations with potential customers.

### **Objectives**

9.2 The three main elements of Cearcaill na Gàidhlig are:

- Transport infrastructure;
- Gaelic language and culture;
- Tourism.

9.3 Achievable operational objectives, with associated measurable outcomes, should be set for each of these once market, product development, partnership development and customer relationship priorities have been adopted. Recommendations on these are provided below.

### **Target Groups**

9.4 Cearcaill na Gàidhlig currently has no specific groups it is trying to reach. On the one hand it is promoting the Gaelic Rings to people who are already on holiday in the area, while on the other it is trying to generate new business through general – and sometimes relatively expensive – marketing to a wide audience.

9.5 We suggest that it would be more constructive to define and focus on particular target groups and to develop a marketing strategy to reach them. For example, one logical target group would be those with an interest in the Gaelic language and culture, including Gaelic learners and speakers. This is a widely dispersed group – as well as in Scotland, there are Gaelic societies and learners groups in countries such as Australia, Canada, England, Germany, New Zealand and the USA. The Atlantic Gaelic Academy offers distance learning classes to students all over the world. Members of these groups are potential customers, many of whom are likely to have an interest in both short language courses and in holidays where they can hear Gaelic spoken in an everyday setting. This market also has the advantage of being relatively easy to contact as individuals are likely to be members of a formal group.

9.6 In a similar vein, people who are involved with or have an interest in Gaelic music and culture would be a logical target group. This might involve joint working with groups such as Fèisean nan Gàidheal and Celtic Connections as well as local groups and events such as the Hebridean Celtic Festival.

### **Product Development**

9.7 Defining a target market does not preclude Gaelic Rings material being available for other visitors and potential visitors, but it would make it possible to develop a product that would attract that market. For example, the Gaelic learners market is likely to be interested in accommodation where Gaelic is spoken; in guided walks with a bilingual leader; in heritage centres where there is Gaelic interpretation; and in Gaelic music and ceilidhs. All of these will tend to be of interest to a wider market with an interest in

Gaelic culture, but they would be of particular interest to Gaelic learners. Developing the product in such ways with features on the Gaelic Rings website, and links to other websites would strengthen the product for all potential visitors.

### **Building Partnerships**

- 9.8 Developing the product is not for Cearcaill na Gàidhlig alone. The Cearcaill na Gàidhlig funding partners should work with other partners who have a stake in delivering products that fit the market. These partners (particularly private sector businesses) might also be given a role in shaping the products to be offered through participation in workshops and continuing communication. Tour operators are keen for Cearcaill na Gàidhlig to succeed, and it will be important to ensure that they are involved in discussions. For their part, Gaelic development agencies could offer specific training or help businesses to invest in their product. Limiting participation to those businesses with a genuine and enthusiastic interest in developing Gaelic-related tourism and offering a quality service would lead to a much reduced and more manageable number of partner businesses. Leaflets and other promotional material could be distributed more widely (perhaps to associate businesses), but the ethos of the partnership would be that each party has some responsibility to the others. Cearcaill na Gàidhlig would put information about what partner businesses can offer on its website, with appropriate links to simplify the booking process for the visitor.
- 9.9 For the wider market, as the Gaelic Rings brand becomes identified with high quality journeys through an area with an outstanding natural environment and a vibrant Gaelic culture, further partnerships could be developed. For example, the Ring of Kerry, in Ireland, is strongly featured by bus tour companies and Ring of Kerry Cruisetours, which include a 4-night land tour of Shannon, Killarney and Cork before embarking on a 12-day Northern Europe or British Isles Cruise, and are marketed by Princess Cruises.
- 9.10 A stronger partnership with VisitScotland is also recommended, in particular through active promotion by Visitor Information Centres in the Gaelic Ring areas, and a raised profile on VisitScotland's website.

### **Building Relationships with Customers**

- 9.11 Relationship marketing – creating a communication channel with potential customers – is particularly appropriate for an initiative such as Cearcaill na Gàidhlig, where potential visitors have an intrinsic interest in the product. Through the internet and email, relationship marketing has become much easier, and Cearcaill na Gàidhlig should start building a database of those interested in its product so that it can keep them informed of developments – activities being offered, forthcoming events of special interest, improvements in the transport infrastructure, etc. Such a communication channel, however, needs to be two way, so that customers can also use the Gaelic Rings website to keep each other informed about what they have done, what they have enjoyed (and what they haven't) on their Gaelic Rings journey, etc.
- 9.12 If Gaelic Rings visitors were given a book of vouchers offering discounts or other incentives, this would also help in monitoring the uptake of the Gaelic Rings and illustrate take-up to partner businesses.

## **Management and Funding**

- 9.13 We would suggest that to take these recommendations forward, at least in the short term, more active management will be needed, either through a management contract or the appointment of a project officer. This would not be possible within the agreed funding from the project partners, which allows for an annual budget of £65,000 over the next three years. However, taking the initiative forward in the new ways suggested, with revised objectives and a renewed focus, could make it attractive to new partners such as HIE, or to funding sources such as LEADER. In particular, investment in a revised model in 2010 would enable Cearcaill na Gàidhlig to contribute fully to Scotland's Islands, the celebration of island cultures scheduled for Spring 2011 to Spring 2012.

## **A Development Scenario**

- 9.14 Ultimately, success will be judged on impact. On the 10:1 ratio referred to earlier in this evaluation, expenditure of £50,000 per annum on the initiative as a tourism marketing mechanism (as distinct from an integrated transport or Gaelic development mechanism) should generate at least £500,000 in additional visitor spending to represent good value for money – i.e. (in round figures) 1,000 new visitors to the area per annum x £500 average spend per trip. On evidence to-date, this would be a challenging target that would require a much improved inter-active website, strong commitment from a core of businesses in different areas, a means of visitors booking Rings as a complete holiday, and sharper targeting of markets. Eventually, marketing expenditure by partner businesses should replace a proportion of the initiative's public agency support funding.

## **Monitoring and Market Intelligence**

- 9.15 During Cearcaill na Gàidhlig's next development phase, we recommend that mechanisms be established to obtain feedback from:
- People who receive marketing material in advance of their visit;
  - People who have purchased Island Hopscotch tickets;
  - Other visitors on holiday in the Gaelic Ring areas (to check their awareness of the initiative);
  - People known to have taken Gaelic Ring holidays.

APPENDIX 1

<b>Gaelic Rings Routes: Passenger Carryings</b>						
<b>Route 7</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>
Oban - Craignure	653313	649768	640426	596742	554568	578286
Tobermory - Kilchoan	43483	41193	40609	40316	38066	38277
Mallaig - Armadale	188320	189544	188929	190557	187507	208840
	887120	882510	871970	829622	782149	827412
<b>Route 11</b>						
Mallaig - Armadale	188320	189544	188929	190557	187507	208840
Uig - Lochmaddy	152047	159389	148587	160306	161737	185818
Berneray - Leverburgh	51570	52243	51405	53863	53941	58244
Stornoway - Ullapool	188945	183217	181160	185522	182833	219907
	580882	584393	570081	590248	586018	672809
<b>Route 15</b>						
Oban - Castlebay	45939	43319	45296	46562	46153	57043
Barra - Eriskay	38707	37095	37336	38693	39721	48788
Lochmaddy - Uig	152047	159389	148587	160306	161737	185818
Armadale - Mallaig	188320	189544	188929	190557	187507	208840
	425013	429347	420148	436118	435118	500489
<b>Route 18</b>						
Kennacraig - Islay	148047	150890	152526	157408	159343	171380
Islay - Colonsay	7294	7383	7309	8685	9932	10102
Colonsay - Oban	15313	15512	16047	16275	15643	16239
	170654	173785	175882	182368	184918	197721
<b>Route 19</b>						
Oban - Coll	44583	45698	44124	46411	46538	52974
Coll - Tiree						
Tiree - Oban						
Mallaig - Rum - Eigg - Muck - Canna - Mallaig	19441	19984	21444	23411	23900	26099

**Online business survey**

Cearcaill na Gàidhlig (The Gaelic Rings) - Evaluation
<b>1. Introduction</b>
<p>Cearcaill na Gàidhlig, the tourism marketing initiative, has commissioned an evaluation of its progress to date. In order to do this effectively we need your help.</p> <p>As a business participating in the Cearcaill na Gàidhlig initiative, can you please take the time to answer this survey, which forms an important part of the evaluation.</p> <p>If you have any questions about the survey, please contact either Sandy Anderson on 01349 863115, or Stuart Brownlee on 01456 451056.</p> <p>Please complete the survey by Friday 12th March 2010.</p> <p>It should only take a few minutes. Not all of the questions may be applicable to your business, but please answer those which do apply.</p> <p>The twin aims of Cearcaill na Gàidhlig are to boost cultural tourism and Gaelic language related tourism activity. The key feature is the concept of Gaelic Rings, itineraries which provide visitors with the information to build their own holiday around the unique language and cultural heritage of the area. There are currently six 'ring' journeys, each of them based on one of Cal Mac's Hebridean Hopscotch routes.</p> <p>Your feedback is essential to assessing the success or otherwise of Cearcaill na Gàidhlig and to help in its development as an effective, efficient and economic tourism marketing initiative.</p>



## Cearcaill na Gàidhlig (The Gaelic Rings) - Evaluation

### 2. Who you are

#### 1. Name of Business:

#### 2. Nature of Business:

- |   |     |
|---|-----|
| <input type="checkbox"/> Accommodation          | 49% |
| <input type="checkbox"/> Activity Provider      | 5%  |
| <input type="checkbox"/> Attraction             | 5%  |
| <input type="checkbox"/> Catering               | 7%  |
| <input type="checkbox"/> Leisure                | 7%  |
| <input type="checkbox"/> Retail                 | 2%  |
| <input type="checkbox"/> Travel                 | 9%  |
| <input type="checkbox"/> Other (please specify) | 16% |

#### 3. Name and Position of person completing survey:

#### 4. Contact Details:

Address

Telephone

e-mail

Website

#### 5. When did you first receive information on Cearcaill na Gàidhlig?

- |                            |                 |
|----------------------------|-----------------|
| <input type="radio"/> 2007 | 33%             |
| <input type="radio"/> 2008 | 24%             |
| <input type="radio"/> 2009 | 6%              |
|                            | no response 37% |

## Cearcaill na Gàidhlig (The Gaelic Rings) - Evaluation

### 3. Activity undertaken by your business to date in relation to the Gaelic Ring...

1. Cearcaill na Gàidhlig provided a range of marketing material. Please tell us how you used this material in helping you to support and develop your business:

	Did not use	Used a little	Used a lot
'Gaelic in your Business' publication	<input type="radio"/> 16%	<input type="radio"/> 17%	<input type="radio"/> 5%
Gaelic Rings stickers	<input type="radio"/> 10%	<input type="radio"/> 22%	<input type="radio"/> 15%
Gaelic Rings posters	<input type="radio"/> 15%	<input type="radio"/> 15%	<input type="radio"/> 10%
Gaelic Rings leaflets	<input type="radio"/> 10%	<input type="radio"/> 11%	<input type="radio"/> 45%
Gaelic Rings guide book	<input type="radio"/> 10%	<input type="radio"/> 20%	<input type="radio"/> 15%
Gaelic Rings stories leaflets	<input type="radio"/> 17%	<input type="radio"/> 9%	<input type="radio"/> 10%
www.gaelic-rings.com	<input type="radio"/> 22%	<input type="radio"/> 6%	<input type="radio"/> 0%

Please use this space to expand / comment on your selection

## Cearcaill na Gàidhlig (The Gaelic Rings) - Evaluation

2. The Cearcaill na Gàidhlig initiative made use of a range of advertising opportunities / space during 2009 (listed below), as well as the marketing material listed in Question 3.1. Overall, how effective, do you think, was the use of this marketing material and advertising opportunities / space in helping to support and develop your business?

	Not effective	Limited positive effect	Quite effective	Very effective
'Gaelic in your business' publication	6.5%	4.5%	5%	0%
Gaelic Rings stickers	6%	5.5%	14%	0%
Gaelic Rings posters	7%	4.5%	10%	0%
Gaelic Rings leaflets	5%	4.5%	23%	14.3%
Gaelic Rings guide book	5%	8%	10%	14.3%
Gaelic Rings stories leaflets	6.5%	4.5%	10%	0%
www.gaelic-rings.com	7%	3.5%	0%	0%
Press advertising	6.5%	4.5%	0%	14.3%
Six Gaelic Ring journeys and Oban launch DVD posted on YouTube	6%	7%	0%	0%
Generic leaflet incorporating all six journeys, distributed at key tourism points	5%	7%	0%	14.3%
60 second advertorial on Classic FM (Scotland & Northern Ireland)	6.5%	5.5%	0%	0%
Online promotion and holiday competition (UK-wide)	6%	7%	0%	0%
Flybe seat pocket leaflets during all flights in September 2009	6%	7%	5%	14.3%
CalMac's 'Explore' publication	3%	9%	19%	14.3%
Private sector tour operators	6%	5.5%	0%	14.3%

## Cearcaill na Gàidhlig (The Gaelic Rings) - Evaluation

developing  
package holidays /  
itineraries based  
on the Cearcaill na  
Gàidhlig concept,  
branding and  
routes

Highland Airway's  
in-flight magazine  
'Aurora'

Visit Scotland  
mailshots



6%



7%



0%



0%



6%



5.5%



5%



0%

Please use this space to expand / comment on your selection

**3. If you did see press advertising about the Cearcaill na Gàidhlig initiative, can you please tell us what publications you saw this in:**

## Cearcaill na Gàidhlig (The Gaelic Rings) - Evaluation

**4. How many of your customers have mentioned the Gaelic Rings as a motivation for their visit to the area?**

- |                                   |     |
|-----------------------------------|-----|
| <input type="radio"/> None        | 73% |
| <input type="radio"/> Not many    | 18% |
| <input type="radio"/> Quite a few | 9%  |
| <input type="radio"/> Many        | 0%  |

Please use this space to expand / comment on your selection (or provide numbers if you can)

## Cearcaill na Gàidhlig (The Gaelic Rings) - Evaluation

### 4. Your involvement in the Cearcaill na Gàidhlig initiative:

Do you think that involvement in the Cearcaill na Gàidhlig initiative has helped your business to raise the profile of the Gaelic language and culture? Please answer the questions below:

#### 1. How interested is your business in cultural or Gaelic-related tourism activity?

- |  |     |
|--|-----|
| <input type="radio"/> Not interested   | 9%  |
| <input type="radio"/> Minimal interest | 23% |
| <input type="radio"/> Quite interested | 32% |
| <input type="radio"/> Very interested  | 36% |

Please use this space to expand / comment on your selection

#### 2. How would you rate the interest of your tourist customers in Gaelic language and culture?

- |  |     |
|--|-----|
| <input type="radio"/> Not interested   | 15% |
| <input type="radio"/> Minimal interest | 33% |
| <input type="radio"/> Quite interested | 40% |
| <input type="radio"/> Very interested  | 12% |

Please use this space to expand / comment on your selection

## Cearcaill na Gàidhlig (The Gaelic Rings) - Evaluation

**3. Has your involvement in the Cearcaill na Gàidhlig initiative encouraged you to extend your use of the Gaelic language? Please describe how this has / might have been achieved:**

**4. Has involvement with the Cearcaill na Gàidhlig initiative encouraged your business to enhance the Gaelic and cultural experiences you offer? If so, please describe what you have done to achieve this:**

## Cearcaill na Gàidhlig (The Gaelic Rings) - Evaluation

### 5. What has been the impact of the Cearcaill na Gàidhlig initiative on yo...

1. How have you incorporated the marketing concept of the Gaelic Rings into the marketing of your business? Please describe:

2. What do you see as the benefits of your involvement with Cearcaill na Gàidhlig to your business?

- |                                       |     |
|---------------------------------------|-----|
| <input type="radio"/> No benefit      | 55% |
| <input type="radio"/> Little benefit  | 29% |
| <input type="radio"/> Some benefit    | 16% |
| <input type="radio"/> Very beneficial | 0%  |

Please use this space to expand / comment on your selection



## Cearcaill na Gàidhlig (The Gaelic Rings) - Evaluation

**3. Has involvement in the Cearcaill na Gàidhlig initiative had an economic impact on your business? (please quantify if possible):**

- |   |     |
|---|-----|
| <input type="radio"/> No economic impact        | 67% |
| <input type="radio"/> Little economic impact    | 28% |
| <input type="radio"/> Some economic impact      | 5%  |
| <input type="radio"/> Very good economic impact | 0%  |

Please use this space to expand / comment on your selection (or provide figures if you can)

**4. Does your business intend to continue to support and commit to the Cearcaill na Gàidhlig initiative?**

- |                             |     |
|-----------------------------|-----|
| <input type="radio"/> No    | 9%  |
| <input type="radio"/> Maybe | 47% |
| <input type="radio"/> Yes   | 43% |

Please use this space to expand / comment on your selection

## Cearcaill na Gàidhlig (The Gaelic Rings) - Evaluation

5. From your involvement with visitors who mentioned the Gaelic Rings, what form of transport were the majority using? (please quantify if possible):

- |  |     |
|--|-----|
| <input type="radio"/> Own vehicle      | 76% |
| <input type="radio"/> Hired car        | 6%  |
| <input type="radio"/> Public transport | 6%  |
| <input type="radio"/> Other            | 12% |

Please use this space to expand / comment on your selection (or provide numbers if you can)

## Cearcaill na Gàidhlig (The Gaelic Rings) - Evaluation

### 6. Feedback from visitors

From feedback you might have received from visitors, how much difference do you think that this initiative has made to:

#### 1. Their itineraries:

- |  |     |
|--|-----|
| <input type="radio"/> No difference                                    | 44% |
| <input type="radio"/> A small difference to a small number             | 50% |
| <input type="radio"/> A small difference to a large number             | 0%  |
| <input type="radio"/> A significant difference to a small number       | 0%  |
| <input type="radio"/> A significant difference to a significant number | 6%  |

Please use this space to expand / comment on your selection (or provide numbers if you can)

#### 2. Their enjoyment of their holiday

- |  |     |
|--|-----|
| <input type="radio"/> No difference                                    | 42% |
| <input type="radio"/> A small difference to a small number             | 42% |
| <input type="radio"/> A small difference to a large number             | 11% |
| <input type="radio"/> A significant difference to a small number       | 0%  |
| <input type="radio"/> A significant difference to a significant number | 5%  |

Please use this space to expand / comment on your selection (or provide numbers if you can)

## Cearcaill na Gàidhlig (The Gaelic Rings) - Evaluation

### 7. Future development of the Cearcaill na Gàidhlig initiative

From your experience of participating in the initiative, how would you suggest Cearcaill na Gàidhlig be developed in the future?

#### 1. From your business's perspective:

#### 2. From visitors' perspective:

#### 3. To better enhance Gaelic language development:

#### 4. To improve overall economic impacts: