


The Economic Value of Walking




Background

- Value of walking acknowledged but never properly quantified
- Major piece of research undertaken for the Ramblers' Association in Wales— could this be replicated for Shropshire?
- Before committing resources into this – review of all existing research, including:
 - Economic Impact of Tourism
 - Shropshire Visitor Survey
 - Tourism Market Segmentation (Arkenford)
 - Natural England MENE Survey
 - AONB Study
 - Outdoor Recreation User Survey

How is Shropshire's Walking Product perceived?

- 7% of visitors to Shropshire said the quality of the walking product was what they specifically like about Shropshire (Shropshire Visitor Survey)
 - 73% of current visitors associate Shropshire with outdoor activities (Arkenford)
 - Current visitors to Shropshire particularly like gentle strolls, river walks and forest trails but three-quarters also enjoy more strenuous hill walking and rambling (Arkenford)
- 

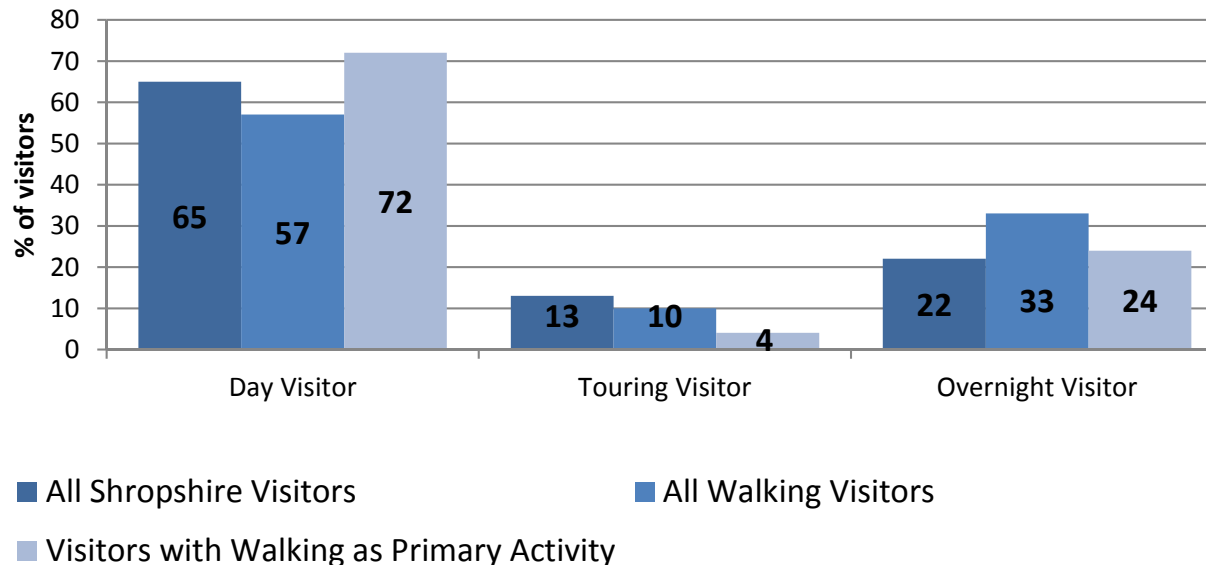
How well do we cater for walking tourists

- Almost half of all Shropshire Tourism accommodation members specifically say that they accept walkers
 - 41 accommodation providers have Walkers Welcome accreditation
 - Four towns have “Walkers are Welcome” status
- 

Characteristics of Walking Tourists

- Visitors coming specifically to walk – much more likely to be day trippers than staying over (Shropshire Visitor Survey)

Type of Visit: Walkers Compared with other Visitors



- Those staying over very likely to include walking as part of their trip (but it is less likely to be their main motivation for visiting)
- Walking visitors very likely to be repeat visitors (78% of all those walking and 84% of those walking as main activity)
- Less likely to be with family, more likely to be with friends but most frequently as part of a couple.

Economic Value of Walking Tourism

Tourism Overall

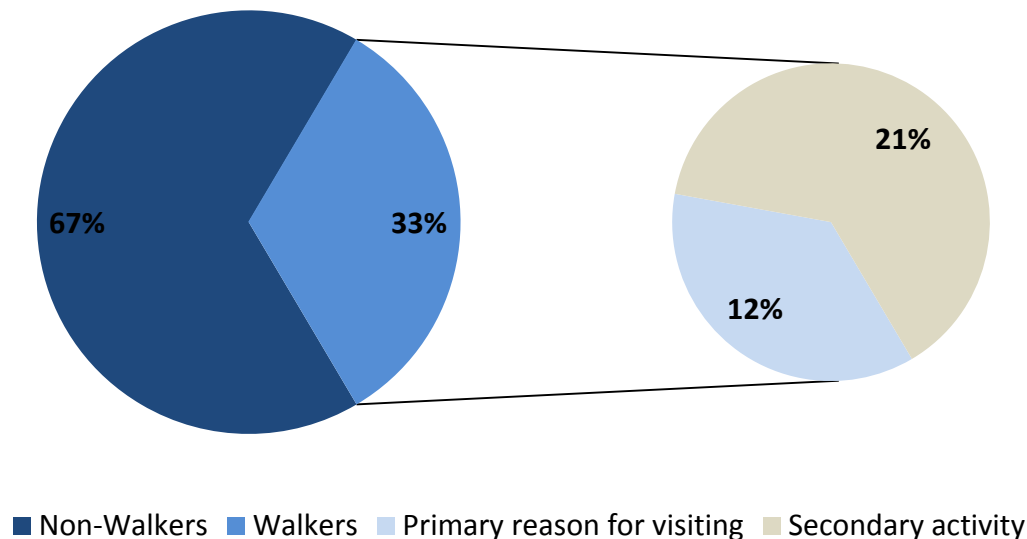
- Total value of tourism – more than £450 million in 2005 (Cambridge Model)
- Accounts for a tenth of employment
- Generates roughly 5% of GVA



Walking – what contribution does it make to the visitor economy?

A third of visitors walk at some point during their trip, and for 12%, this is the main reason for visiting Shropshire (Shropshire Visitor Survey)

Percentage of Visitors to Shropshire who Walk



How much do walking tourists spend?


- Day visitors – around a third less than standard visitors at £26.80 (Shropshire Visitor Survey)
- Staying visitors – a little bit more than average at £47.95 per night (Shropshire Visitor Survey)




Using these spend figures, we can calculate that walking tourism:

- generates an approximate economic value of just **over £50 million** (11% of the total visitor economy)
- supports almost **1,000 jobs** (including indirect and induced)

Note: excludes any value associated with visitors for whom walking is a secondary activity



Local Walking

- Half of all Shropshire residents had taken a visit to enjoy the natural environment over the last week (MENE)
 - The average number of trips per household was 1.8
 - Most trips last for between half an hour and two hours
 - Most visits were to the countryside
 - Walking (either with or without a dog) by far the most common activity
 - Health/exercise most common reason for activity
- 

The economic value of these visits....

- Three-quarters of these visits result in no spend at all
- Only 7% of visits incur spend of more than £20
- The average spend per trip was £6.54, more than half of which was spent on food and drink
- Total value of leisure walking is approximately **£15 million**



Next Steps

- Up-date walking tourism value figures
- Detailed analysis of Shropshire Council's Outdoor Recreation Survey
- Investment in more detailed research??