



# 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

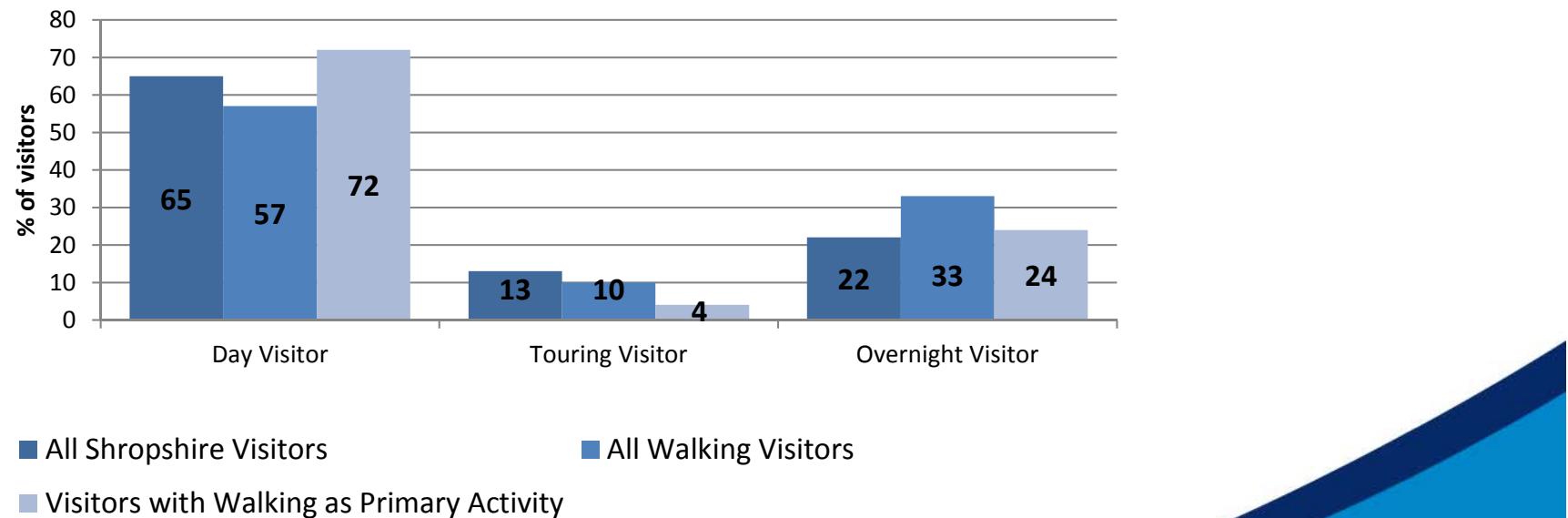
- Almost half of all Shropshire Tourism accommodation members specifically say that they accept walkers
- 41 accommodation providers have Walkers Welcome accreditation
- Four towns have “Walkers are Welcome” status



## 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

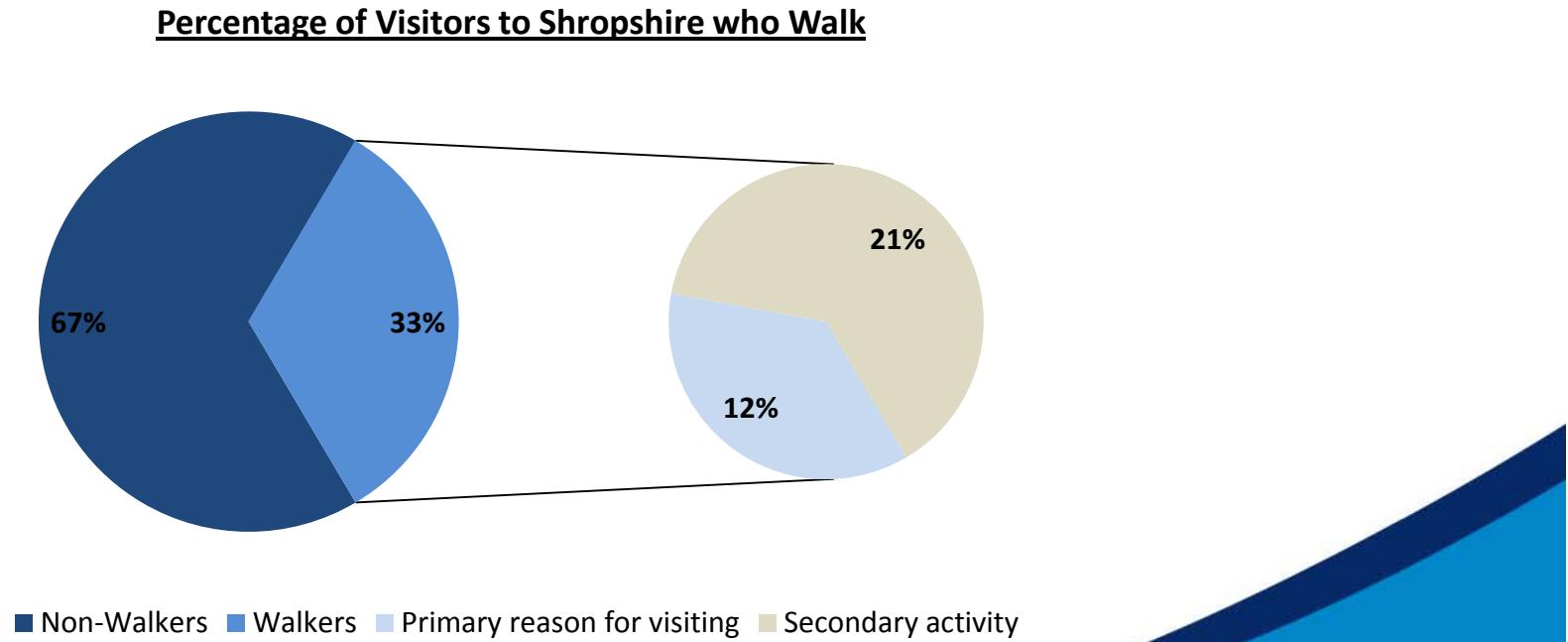
- Total value of tourism – more than £450 million in 2005 (Cambridge Model)
- Accounts for a tenth of employment
- Generates roughly 5% of GVA





## 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)



## 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 (<sup>MENE</sup>)
- 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??