



## Insight Department: Walking

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Topic Paper  
June 2017

 Visit  
Scotland | Alba™

# Welcome

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Fact: The number of trips that included a short walk/stroll also increased by 14% from 2014 to 2015.

The objective of this paper is to provide up-to-date information on the walking tourism market in Scotland. With 26 long distance walking routes collectively stretching over 1700 miles and 282 Munros (mountains over 3000ft), Scotland is renowned for its walking opportunities.

The Munro Society, which you can join should you bag all 282 munros, has over 5000 members showing the popularity of mountaineering in Scotland (many munroists do not register with The Munro Society). In 2015 2,069,000 trips to Scotland included a long walk, hike or ramble. This is an increase of 18% from 2014 figures.

Sources: GBTS, 2015: The Munro Society, 21/12/16



# Overview

2015	SHORT WALK/ STROLL (UP TO 2 MILES/ 1 HOUR)			LONG WALK, HIKE OR RAMBLE (MINIMUM OF 2 MILES/ 1 HOUR)		
	Trips (000's)	Nights (000's)	Expenditure (£m)	Trips (000's)	Nights (000's)	Expenditure (£m)
<b>SCOTLAND TOTAL</b>	3058	11756	959	2069	9355	776
	Spend Per Night (£)	Spend Per Trip (£)	Nights Per Trip	Spend Per Night (£)	Spend Per Trip (£)	Nights Per Trip
<b>SCOTLAND TOTAL</b>	82	314	4	83	375	5
	Trips (000's)	Nights (000's)	Expenditure (£m)	Trips (000's)	Nights (000's)	Expenditure (£m)
<b>NORTH</b>	829	4123	296	747	3941	302
<b>SOUTH</b>	435	1758	116	423	1979	121
<b>EAST</b>	1164	4109	339	752	2798	231
<b>WEST</b>	887	3079	197	406	1321	118
	Spend Per Night (£)	Spend Per Trip (£)	Nights Per Trip	Spend Per Night (£)	Spend Per Trip (£)	Nights Per Trip
<b>NORTH</b>	72	357	5	77	404	5
<b>SOUTH</b>	66	267	4	61	286	5
<b>EAST</b>	83	291	4	83	307	4
<b>WEST</b>	64	222	4	89	291	3

Source: GBTS, 2015 (activities under taken as part of a trip)

Short walks/strolls up to 2 hours are the preferred activity with domestic tourists when in Scotland, with 48% more trips including a short walk than those trips that included longer walks.

Whilst participation is significantly higher in the shorter walking markets, the proportional differences between spend and nights is not as large. 20% more nights were consumed by shorter walkers than longer walking markets, and the spend disparity between the activities

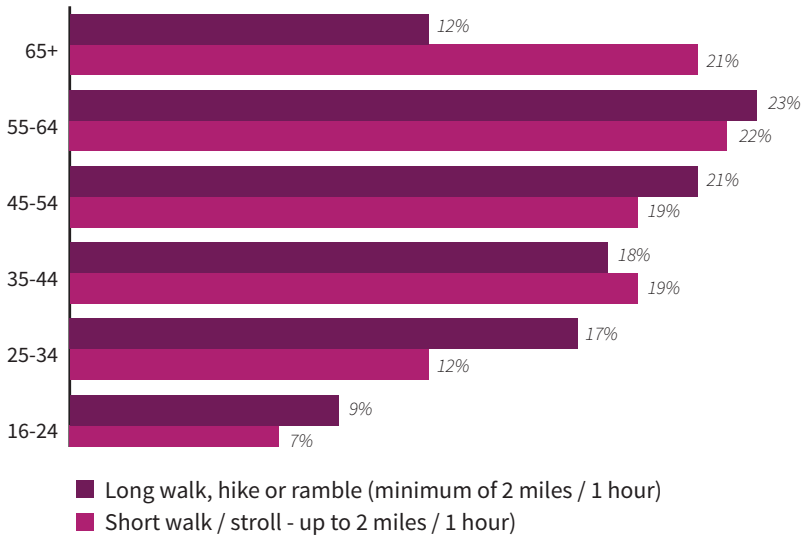
markets is only 23%. Walkers who go on longer walks when visiting, spend on average £1.4 more a night and stay for 1 extra night.

The highest spend per night by area for short walks is the East of Scotland, and for longer walks is the West of Scotland. For both long and short walk markets the highest revenue is generated in the East of Scotland but the highest number of nights are spent in the North of Scotland.

# Consumer Profile

GENDER	SHORT WALK/STROLL - UP TO 2 MILES/1 HOUR	LONG WALK, HIKE OR RAMBLE - MIN 2 MILES/1 HOUR
MALE	48%	46%
FEMALE	52%	54%

## AGE OF VISITORS WHO PARTICIPATED IN WALKING WHEN SCOTLAND



Source: GBTS 2015

Walking visitors to Scotland are most likely to be female, however the gender gap is slightly more pronounced in the long walking market. The largest age groups of walkers are 55-64 and 45-54 for both the long and short walking markets. 25-34 year old make up a larger share of the long walking market than the short

walking market. Those over the age of 65 have a larger market share in the short walking market than the long walking market. Millennials make up 26% of visitors who participate in long walks and 19% of visitors who participate in short walks when in Scotland.

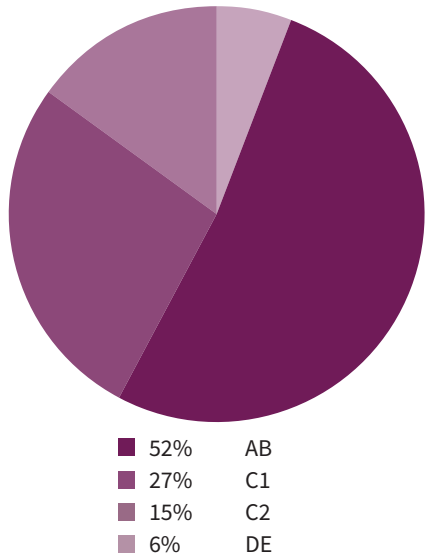
# Social Structure

Fact: 93% of people would be likely\* to recommend Scotland as a holiday/short break destination

Footnote: \*Likely = scored 8, 9 or 10 out of 10. Source: VisitScotland Visitor Survey, 2015

The majority of people who participate in walking as a leisure activity when in Scotland are of social groups A or B. Only 6% of those who listed walking as an activity they undertook when in Scotland were of social groups D or E.

## SOCIAL STRUCTURE OF WALKERS



Source: GBTS, 2015





# Activities

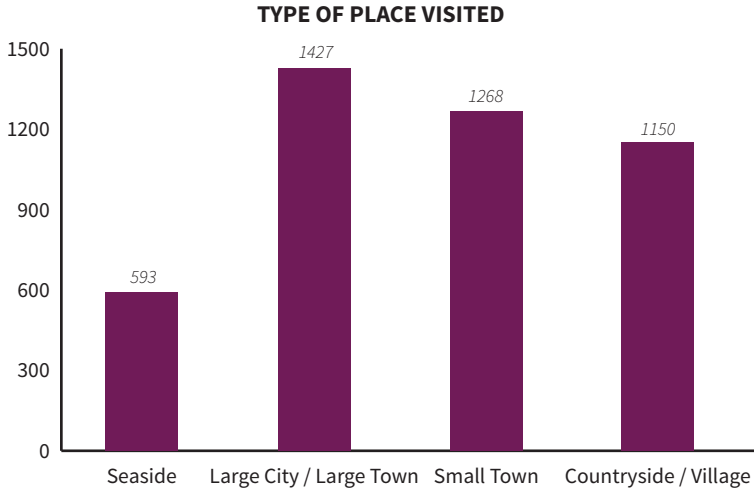
OTHER ACTIVITIES UNDERTAKEN BY THOSE WHO PARTICIPATED IN WALKING WHEN IN SCOTLAND	TRIPS (000'S)
Sightseeing on foot	2270
Just relaxing	2052
Sightseeing by car	1453
Visiting a castle/other historic site	902
Visiting a country park	735

Source: GBTS 2015

Those who participate in walking when in Scotland also enjoy taking part in sightseeing, relaxing and visiting castles/historic sites and country parks.



# Places Visited and Accommodation



Source: GBTS, 2015

■ Trips (000's)

Walkers mostly stay in cities or large towns, closely followed by small towns and then countryside/villages. They are least likely to stay in seaside locations. A large proportion of those

who participated in walking when in Scotland chose to stay with friends or relatives although the most popular accommodation choice was to stay in a hotel or motel.

ACCOMODATION	SHORT WALK/ STROLL	LONG WALK/HIKE
Hotel/Motel	30%	28%
Friend's /Relative's home	29%	24%
Rented Self-Catering - House/Chalet/Villa/Bungalow/Cottage	15%	22%
Paying guest in - Other private house /B&B	6%	7%
Caravan - Towed	5%	6%
Camping	3%	5%
Rented Self-Catering - Flat/Apartment	5%	4%

Source: GBTS, 2015

# Walking activities in National Parks

TRIPS(000'S) IN 2015	LOCH LOMOND AND TROSSACHS	CAIRNGORMS
Long walk, hike or ramble (minimum of 2 miles/ 1 hour)	48	130
Short walk/ stroll - up to 2 miles/ 1 hour	91	111

Source: GBTS, 2015

Long walks or hikes in Loch Lomond, the Trossachs and the Cairngorms by GB visitors totalled 178,000 trips in 2015, which is about 9% of the total number of trips which included a long walk or hike by domestic visitors. The proportion of

short walks that were undertaken in these two national parks is around 7% of all trips that included a short walk or stroll by domestic markets when in Scotland.





# Day Visitor Activity

DAY VISIT ACTIVITY	VISITS (000'S)	SPEND (£M)	AVERAGE DAILY SPEND (£)
Short Walk/Stroll - up to 2 miles/1 hour	8,000	298	37
Long Walk, Hike or Ramble (minimum of 2 miles/1 hour)	7,000	136	19

Source: GB Day Visitor Survey, 2015

Those who go on short walks as part of a day visit to Scotland spend almost double of those who go on longer walks spend, this is most likely due to those who participate in short walks have a higher probability of participating in another activity alongside their walk, whereas a long walk could take up the entire day.

Day visitors who participate in short walks spend half as much as their

overnight counterparts and those day visitors who go on longer walks spend less than a quarter of their overnight counterparts. Walking is also a method of transportation for those going on day trips and in 2015 there were 8 million tourism day trips made where the main mode of transportation was walking.



# Popular Outdoor Attractions in Scotland

OUTDOOR ATTRACTION BY POPULARITY	2014	2015	% CHANGE
Strathclyde Country Park, Motherwell	5 648 337	5 407 774	-4.3
Rouken Glen Park, Giffnock	901 901	1 095 813	21.5
Drumpellier Country Park, Motherwell	976 458	919 573	-5.8
Calderglen Country Park, East Kilbride	907 565	884 265	-2.6
The Helix, Falkirk	800 000	708 471	-11.4
Lochore Meadows Country Park, by Lochgelly	600 000	670 000	11.7
Mugdock Country Park, Milngavie	622 985	631 336	1.3
Chatelherault Country Park, Hamilton	602 138	598 733	-0.6
Palacerigg Country Park, Cumbernauld	620 299	578 931	-6.7
Galloway Forest Park, by Newton Stewart	441 307	446 688	1.2
John Muir Country Park, Dunbar	425 000	430 000	1.2
Tweed Valley Forest Park, by Peebles	344 198	346 678	0.7
Aden Country Park, Mintlaw	298 368	326 620	9.5
Gleniffer Braes Country Park, Paisley	319 000	319 000	0.0
Clyde Muirshiel Regional Park, Castle Semple Centre, Lochwinnoch	343 106	318 904	-7.1
Glenmore Forest Park, by Aviemore	248 426	292 630	17.8

Source: Moffat Centre Visitor Attraction Monitor, 2015

The above figures include domestic, international, day and overnight visitors to attractions of an outdoor nature. As most country/national parks have free admission, visiting them is accessible to

everyone. Rouken Glen Park in Giffnock received the highest growth of visitors between 2014 and 2015, increasing visitor numbers by 21.5%.

# Google Analytics

PAGE ON VISITSCOTLAND'S WEBSITE	PAGE VIEWS FOR 2016
Walking	124,941
Walking Routes and Trails	68,120
7 Walking Wonders	30,890
Munro Bagging	24,675

Source: Google Analytics 1/1/2016-31/12/16

Participation in walking when in Scotland is high and this is demonstrated by the popularity of the walking pages on VisitScotland’s website. Walking is the second most popular ‘activity’ page viewed on the VisitScotland website and ‘Munro Bagging’ was viewed on average 68 times a day in 2016.



# Walkers Welcome Scheme

With walking being one of the most popular activities undertaken by tourists in Scotland having a walker’s welcome scheme, which accredits accommodation providers and tourist attractions that provide adequate facilities for walkers, gives extra reassurance that their needs will be met when on holiday. For accommodation providers and tourist

attractions to qualify for ‘Walker’s Welcome’ accreditation facilities such as a drying room, information on local walking routes, free Wi-Fi and local public transport information are required. Currently over one thousand businesses in Scotland participate in the scheme showing how vital the tourism sector believes walking is to the industry.

LOCAL AUTHORITY AREA	DISTRIBUTION OF 'WALKERS WELCOME' PARTICIPANTS
Highland	24%
Argyll & Bute	13%
Dumfries and Galloway	10%
Scottish Borders	7%
Perth and Kinross	7%
Comhairle nan Eilean Siar	6%
Fife	5%
Aberdeenshire	4%
Stirling	4%
Angus	2%
Moray	2%

Source: VisitScotland Walkers Welcome Scheme, Statistics as of May 2017

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Highland and Argyll and Bute are the areas with the most businesses participating in the 'Walkers Welcome' scheme. Rural areas are more likely to receive tourists who are walking and require specialist drying facilities than more built up areas due to the location of Munros and long popular walking routes like the West Highland Way. Those who

participate in walking when in cities are more likely to not need specific drying rooms as city walking is likely to be done in non-specialist walking clothes or shoes as it is commonly undertaken as a way to explore a city. The cities of Edinburgh, Glasgow, Aberdeen and Dundee cumulatively make up only 2% of the businesses participating in the scheme.

ACCOMMODATION TYPE	DISTRIBUTION OF 'WALKERS WELCOME' PARTICIPANTS
Self-Catering	40%
Small Serviced	38%
Hotels	12%
Hostel	6%

Source: VisitScotland Walkers Welcome Scheme, Statistics as of May 2017

Small serviced and self-catering accommodation providers combined make up over 70% of the businesses participating in the scheme, this is likely to be the case due to less infrastructure

being required in a self-catering house to turn it in to a walker-friendly property than a hotel or hostel who would need to have a purpose-built drying room installed.



# Tourism Trends

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With growth being identified in the health and wellbeing tourism sector, walking as part of a holiday looks like it could become more popular in 2017. In line with one of VisitScotland's 2017 tourism trends, "Silence is Tartan", the walking industry in Scotland could look to promote itself not only through the fantastic landscapes that it boasts but also through the health benefits

that walking can give the participant. As Scotland could be seen as one of the quietest places in Europe and with the right of access policy throughout Scotland benefiting walkers and outdoor enthusiasts, getting out for a walk in the countryside can provide advantages to the mind as well as the body.







## CONTACT US

### Insight Department

VisitScotland  
Ocean Point One  
94 Ocean Drive  
Edinburgh EH6 6JH

0131 472 2222  
research@visitscotland.com

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visitscotland.com visitscotland.org

## APPENDIX

Great Britain Tourism Survey  
Great Britain Day Visits Survey  
Google Analytics  
VisitScotland Walkers Welcome Scheme

Our partners, VisitBritain have carried out analysis of International Passenger Survey data on the activities undertaken by international visitors to the UK. The report published in 2013, includes a section on outdoors and sport activities undertaken in Scotland.

[https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/Regional\\_Activities\\_report\\_FINAL\\_COMPRESSED.pdf](https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/Regional_Activities_report_FINAL_COMPRESSED.pdf)

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