From Munro's to Ramblers:
The Prospects for Scotland's Walking Proposition to 2015[1]

October 2006

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Introduction

As a holiday experience, walking in Scotland is one of the most popular pastimes for tourists from both within the UK and from abroad. It would not be an understatement to say that Scotland is a paradise for walkers. Blessed with stunning scenery, a multitude of environments, from coastal to forest to mountains and ready access to heritage and culture, Scotland can provide the walking tourist a complete package that other destinations may find difficult to compete with.

In 2003, UK residents who came to Scotland specifically to walk generated £125 million in revenue and undertook almost 400,000 trips; visitors who had walking as part of their visit spent £952 million through 3.2 million visits[1]. In terms of overall holidays to Scotland in 2003, 4% were specifically tourists here to go walking, whereas 33% of holidays had a walking element to it. Within this study the terms walker, rambler and hiker will be used interchangeably to describe a visitor who undertakes a journey by foot for pleasure. In essence, walker is a generic term, rambler is a walker who undertakes long journey of moderate difficulty, usually through "cultivated countryside"; Hiker is also a walker who undertakes long journeys however they are usually seen as tackling terrain of greater difficulty.

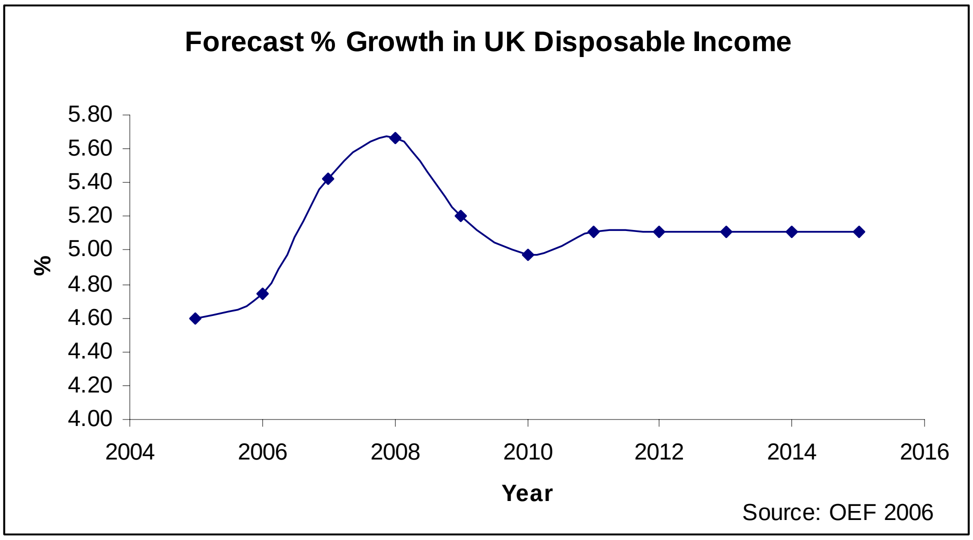
Looking to the future, many drivers are already in place, or are in the process of developing to ensure that walking will remain an attractive proposition for Scottish tourism to 2015. Principle to this development is the changing demographic of the main tourist markets. For the UK and European markets, the visitor demographic most likely to go walking are the 45-65 year olds. This sector is going to increase exponentially over the next decade, reinforcing the belief that this area of the tourist market is going to grow also. Other catalysts that will boost walking holidays in the future will be environmental awareness, carbon offsetting on travel, health and wellbeing, and climate change.

This study will examine the current walking market in Scotland and propose a trend for the next 10 years to 2015. Utilising published national statistics from United Kingdom Tourism Survey (UKTS) and population projections from respected research authorities, forecasts for the future of walking in Scotland will be developed.

Drivers for Walking Holidays

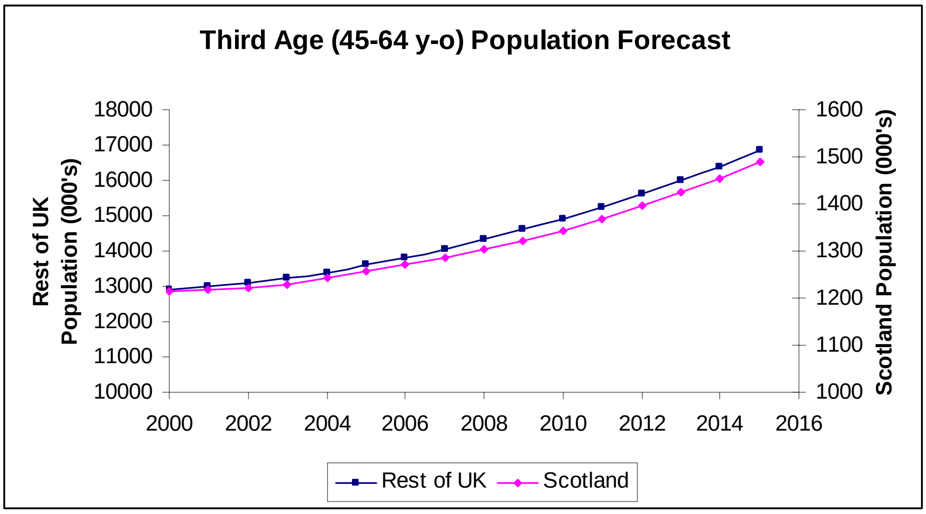
The key drivers for walking tourism have been defined through market research to be as follows:

- Economy - Increasing personal disposable income and consumer expenditure allows individuals the ability to undertake holidays. Leisure breaks are increasingly seen as a necessity and budgeted for accordingly. Walking, both as a main or part of a break is invariably organised independently, however increased wealth allows greater choice in distance of travel, quality of accommodation,



variation in required equipment and so on. Price sensitivity may be more relevant for foreign tourists where exchange rate is also a factor.

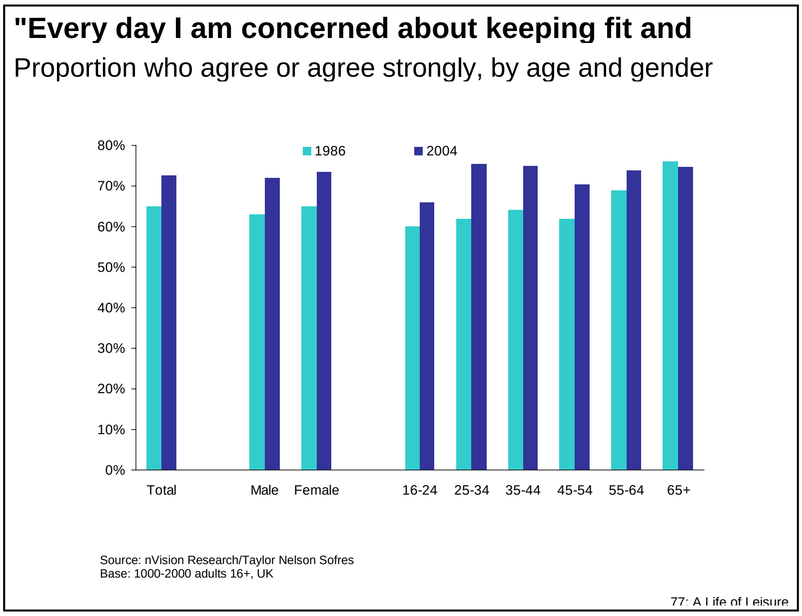
- Demographics – The third-age generation (45 to 64 years old with no children under 16) is set to increase in numbers over the next ten years. This baby-boomer generation is more affluent (compared to the upcoming generations) and conscious of the environment and their health. Walking is an activity that transcends gender, therefore popular with couples; non-competitive; requires minimal specialist equipment and can be incorporated as part of a short break. The third-age-ers are seen as pivotal in the growth of walking tourism, especially as younger generation who seek more extreme outdoor activities begin to decline demographically. Predicted growth for the UK is shown in the chart "Third Age (45-64 y-o) Population Forecast.



- Quality of the environment – Different grades of walker seek their own qualities from the environment they are about to traverse. Dedicated walkers seek the challenge and potential danger of open ground and summits. Occasional walkers look for the challenge of achieving a specified goal. Recreational walkers find added value a catalyst for a walk. Scotland provides all types of walker the qualities they seek. Exposed, highlands and taxing summits draw the dedicated walkers, established long distance paths attract the occasional walkers and culture and heritage is present throughout for the recreational walkers seeking added enjoyment for the journey. Principle to the walker's environment is the highly identifiable mountain grading scheme, where Munro bagging and the Corbett's act to draw committed walkers back year on year to complete the full range. Scotland also boasts the greatest prize for walking, the UK's highest mountain, Ben Nevis.
- Access and Expense – One of the commonly sited barriers for participation in outdoor pursuits is difficulty of access and cost. The recently implemented Countryside Access laws have opened up large areas to the public, with common sense approach the walker can traverse most areas. The growth of urban walks also encourages the city break tourist to engage in walking. Constantly improving transport links accompanied by promotion that the countryside is not far from the cities will encourage the visitor to undertake walking as part of their break, as well as distribute tourism spend throughout rural and urban economies. The Foot and mouth outbreak of 2001 damaged the rural economy to tourism, however effective communication to tourist on access and availability ensures that the perception of barriers to walking remain down. Many outdoor pursuits require significant expenditure on equipment, training or club membership. Walking can be undertaken independently with little financial restrictions on participation.
- Climate – Excluding the dedicated walker, a principle decider on a destination for walkers is the weather. Tourists to Scotland increasingly accept that the climate is that of a typical western European country and rain is a possibility. The climate does however swing the opinion of the occasional walker towards a specific destination. Scotland's brand image however is strong enough to overcome this negative, and it is argued that in the future, weather tourists may seek out the damper, temperate climates to escape the heat and drought that climate change is expected to deliver. According to the latest projections on Scottish Climate and subsequent change, into the next few decades, summers and winters will be longer in duration. Summers will be Hotter and Dryer, winters will be warmer and wetter and Autumn and Spring will be shorter in duration but represent the transition between the extremes therefore be similar to today. Regionally, the

east of Scotland will be dryer compared to the west with the highlands retaining much of its current climate character as it has today for much longer than the south of the country.

- Health & wellbeing – According to the department of health, by 2010, nearly a third of men in the UK will be obese. The reduction of obesity is one of the six overarching priorities of the "Choosing Health" white paper published in 2004. As time goes on public perception of health could change, with walking being an easy, accessible, cheap, inclusive activity which will increasingly be promoted by the government in the future.



Methodology

Within this micro forecast the definition of "a walk" is that used by the UKTS. A walk is a "distance greater than two miles"; it also covers the different varieties of walking activities including hiking, fell-walking etc which categorise the different levels of walking activity. It does not cover climbing and bouldering which are covered under extreme sport or other outdoor activities. Due to the nature of the respondents of all the surveys used in this study, walking may not be perceived as the principle activity of a break to Scotland therefore studies into tourist activity often categorise respondents where walking was the main or additional interest.

Tourism Attitude Survey

Analysing results from the 2005 Tourism Attitude Survey, tourist holiday highlights identify key and potential markets when it comes to the potential for walking. The table below "Attractions that prompted a Scottish holiday" illustrates the percentage response to specific aspects of the Scottish Break. As is illustrated the majority of respondents look to the scenery and mountains as a catalyst for holidaying in Scotland. Walking draws a lower percentage. This is partly due to the niche nature of outdoor activities as a principle reason for visiting a destination and secondly that although for possibly a large number of tourists, walking will be part of their holiday experience but they may not be conscious of it playing a major part (for example, spontaneously taking a forest walk in Perthshire to break up a journey or walking to a heritage site, where the site is the principle attractor and the walk is incidental). Although the walking element may not be seen as relevant, the access to the scenery the walk delivers is more memorable. According to the United Kingdom

Country	Scenery	Mountains	Walking
Scotland	15%	3%	No Response
England & Wales	26%	9%	4%
Germany	33%	11%	6%
France	35%	5%	3%
Italy	46%	3%	No Response
Sweden	35%	No Response	No Response
All Respondents (651)	37%	6%	4%

Attractions that prompted a Scottish holiday

Tourism Survey 2000; "UK visitors to Scotland to watch wildlife spend £85 million a year. The third highest outdoor activity after walking and golf". This illustrates that although the perceived activity was wildlife watching, walking would have been a prominent aspect of the activity.

Based on all respondents (651), activities participated in whilst on holiday in Scotland included:

- Longer Walks - 13% Main Activity / 36% Additional Activity
- Shorter Walks – 6% Main Activity / 82% Additional Activity

This suggests that short walks, although not main activities are a key activity for visitors. German and French tourists see walking as an important element (top main activity) than the English and Welsh (second main activity). The Scots had walking as their fourth main activity (but top additional activity). The Italians and Swedes had walking as fifth and fourth main activity. The Swedish are most likely to take shorter walks and the Germans most likely to take longer walks.

The above analysis suggest that the possible promotion of short walks combining the goal of a heritage destination or scenic view would be seen as attractive for most international and domestic tourists. It is also a possible driver for moving tourists between urban / city locations to rural ones.

Market Segmentation

Based on the VisitScotland CRM customer records on 7th August 2006, 37,249 (or 4%) records of 926,636 were associated with the Walking prospect pool. Of this prospect pool, the spatial distribution by TV region shows that Scotland, Northern England, Midlands and London constitute the majority of respondents. This is in line with standard distribution of tourists to Scotland. Looking to Mosaic consumer classifications, 50% of respondents fall within the "Suburban Comfort", "Symbols of Success" and "Ties of Community" groups. The first two groups represent affluent, professional individuals, with the "Ties of Community" group representing a less affluent individual but one loyal to domestic holidays. This predisposition of these specific groups to walking allows a potential for increased revenue (from the initial groups) and trips (from the third group).

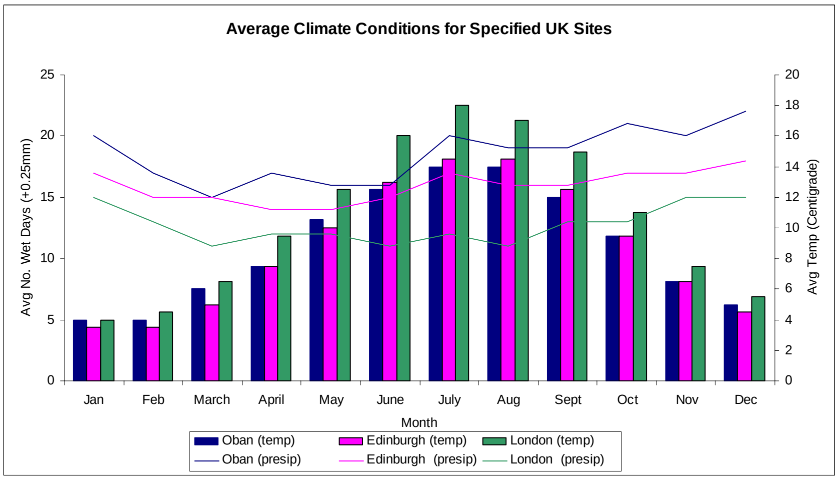
It is unsurprising that when viewing the main interest codes for the walking prospect pool, "Serious Walking" and "Walking" represent the vast majority of responses. Of the remaining responses, the distribution of interests is wide but with few counts associated with them. "City breaks", "Historic Sites", "Touring" and "Wildlife all show higher responses than other classifications (such as "Shopping", "Cycling", "Festive breaks") however, the specific nature of the main prospect pool would skew respondents to the obvious response for main interest in this case. When looking at respondents that had previously visited Scotland the number of the Walking prospect pool equalled 23,475, compared to 4098 that had not previously visited (the remainder made up of blank and null results). This strongly illustrates the attractiveness of the walking package within Scottish tourism with the high proportion of revisits.

Study by the Ramblers Association has shown that between popularity in recreational walking is rising. From 1987 to 1997 an 8% growth in walking occurred with 44.5% of the UK population engaged in the pastime. Ramblers Association membership has raised from 38,000 in 1980 to over 140,000 today. 77% of UK adults (or about 38 million people) say they walk for pleasure at least once a month. Of the people who regularly walk over two miles for recreation, the profile shows that they are more likely to be males aged around 43 years (median age) with a higher than average income. It should be noted however that as individuals lower than average income walkers tend to walk more often and walk further.

Weather & Climate

Good weather is key in persuading people to participate in outdoor sports. It should be noted however that consistent good weather has a detrimental effect on the sales of clothing and equipment. The perception of Scotland's climate is one of wet, temperate conditions throughout the year. This misconception works beneficially in attracting the outdoor enthusiast. Due to the greater number of positive images of walking in Scotland, the weather is not a main detractor from coming to Scotland. With the Scottish climate being no different to a great degree to other countries around the North Sea area, it benefits from the Gulf Stream providing a stable climate throughout the year, rather than extremes seen in other western European countries. Although it is true that the preceding winter will usually act as an influencer to choosing a summer destination (cold winter drive people to warm summer destinations, warm winters influence people to perhaps undertake cultural or heritage breaks), dedicated walkers will come to Scotland regardless and occasional walkers "pack appropriately".

Looking to the average temperatures and precipitation, the chart "Average climate conditions for UK Sites" shows that for Edinburgh, Oban and London, the extremes of conditions that the people's perception of Scotland hold is not as great as first imagined. In fact looking at the Edinburgh and Oban conditions the cooler summer temperatures and balanced winter climate provide an ideal all year walking environment.



Looking to the future and climate change, models on the Scottish environment suggest that the future will present warmer, wetter winters, longer dryer summers with temperature changes that will not be as extreme as southern Britain or indeed the Mediterranean. This leads to the suggestion that Scotland will increase in its appeal as an outdoor destination with walkers and tourists actively seeking temperate environments to escape dry and hot conditions at home and potentially experience "Rain Walking" as a novelty that is not seen in the tourist's locale.

Scenarios

Scenario 1 – Growth of the third age

Scenario 1 is the benchmark scenario; evidence has shown that growth in the UK walking market will be driven by the Third Age generation[2]. The 45 to 64 year old group is forecast to grow by 22% by 2015. This generation, compared to other generations are generally wealthy with adequate pension provision, independent of family ties and have a desire to travel both domestically and abroad. The attraction of walking to this group is that it provides a healthy pastime which is low impact and non-competitive which encourages couples to take part. The inclusion of walking to heritage and culture breaks is easily made which therefore engages this generation further. It is expected that an approximate 5% year-on-year growth in revenue is expected up to 2015 with added revenue possible through sale of walking equipment such as jackets, boots etc. This forecast is based on the percentage of the population within the 45-64 year old age group and forecast disposable income and relative economic conditions for the year.

Trips (m)	*2005*	*2006*	*2007*	*2008*	*2009*	*2010*	*2011*	*2012*	*2013*	*2014*	*2015*
Walking as main purpose	0.40	0.41	0.41	0.41	0.42	0.42	0.42	0.43	0.43	0.44	0.44
Walking as part of trip	3.83	3.85	3.87	3.89	3.92	3.94	3.97	4.00	4.03	4.07	4.11

Spend (£m)	*2005*	*2006*	*2007*	*2008*	*2009*	*2010*	*2011*	*2012*	*2013*	*2014*	*2015*
Walking as main purpose	133.34	138.70	144.62	151.20	157.93	165.17	173.56	182.92	193.41	205.08	218.02
Walking as part of trip	1013.1	1052.3	1095.8	1144.0	1193.3	1246.4	1307.9	1376.5	1453.4	1538.9	1633.7

Scenario 2 – Declining Health

Scenario 2 looks at the possibility that the prediction made by the Department of Health that obesity increases in the UK and the population does not follow government advice and change eating habits or undertake exercise. Predictions are nearly a third of men will be obese by 2010, along with more than 12 million adults overall and 1 million children[3]. With the country getting bigger, interest in exercise and the great outdoors is declining. Sedentary holidays are on the increase with coach tours and funicular railways, such as the Cairngorm Railway providing all the scenery and wildlife that the tourist to Scotland requires, whilst providing shelter and a café when you arrive. This scenario maintains a constant, muted growth to walking holidays where walking is the main purpose. This represents the core walking market, which is defined as low spend due to its nature of self catering and preference to staying at campsites. Growth in walking as part of a trip declines year on year representing the deteriorating health of the nation and lack of interest in exercise.

Trips (m)	*2005*	*2006*	*2007*	*2008*	*2009*	*2010*	*2011*	*2012*	*2013*	*2014*	*2015*
Walking as main purpose	0.40	0.40	0.40	0.40	0.40	0.41	0.41	0.41	0.42	0.42	0.42
Walking as part of trip	3.83	3.84	3.85	3.85	3.86	3.86	3.86	3.87	3.87	3.87	3.87

Spend (£m)	*2005*	*2006*	*2007*	*2008*	*2009*	*2010*	*2011*	*2012*	*2013*	*2014*	*2015*
Walking as main purpose	133.34	137.37	141.40	145.44	149.47	153.51	157.54	161.58	165.61	169.65	173.68
Walking as part of trip	1013.1	1039.4	1066.5	1073.8	1085.0	1094.6	1102.9	1110.3	1117.0	1123.1	1128.6

Conclusion

Scotland provides an exceptional environment for walking holidays at all levels. A myriad of surroundings from coast to forests to mountains can challenge the dedicated and stimulate the ambler. Walking represents a significant percentage of the activity undertaken by visitors supported by high proportions of both domestic and international tourists commenting on the scenery and mountains being a major factor of their break.

Key drivers in influencing walking holidays include the economy, demographics, quality of the environment, climate, access and expense and health and well being. Each driver influences the visitor in the possibility of undertaking a walk as an aspect of their break. Improving links to walks and promoting routes, both rural and within cities and creating durable pathways would enhance the walking experience for the great majority of those who see waling as part of their break. For the dedicated walkers who seek the challenges the wilderness of Scotland present maintaining bothys and mountain huts, publication of guides and waypoints would add value to the experience without destroying the authenticity this segment is seeking.

The future is in the hands of the Third-Age generation. The baby boomers with relative affluence and propensity to travel have been found through market research to be drawn to walking holidays. The accessibility and low impact nature allows couples to take part on an equal level and enjoy the wildlife, heritage and culture that Scotland has to offer, packaged in a healthy pursuit. The forecast growth in this market is reliant on the trends of this demographic segment.

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[1] Corporate Research (2004) UK residents walking holidays in Scotland 2003. VisitScotland, Edinburgh.

[2] Mintel (2005) Activity Holidays, Leisure Intelligence. Mintel International Group Ltd London.

[3] Department of Health (2006) Men to top obesity stakes by 2010. HM Government. Accessed at http://www.gnn.gov.uk/environment/fulldetails.asp?releaseID=223003&newsareaid=2&navigatedfromdeparment=false