

Walking trails: information and evaluations

On the basis of a very quick review, there are some official reports and other studies of UK walking trails, including usage and benefits. Due to the resource costs of collecting data, published studies mostly relate to trails that have received significant public funding (and evaluation has been factored in) or as part of feasibility-type studies for new proposed routes. So, for example, there are several published studies of the Wales Coast Path (WCP) but none for the North Wales Pilgrim's Way or Offa's Dyke.¹

In Scotland in 2018, Scottish Natural Heritage published a report that drew on a range of commissioned research on paths and trails as part of its plans for a National Walking and Cycling Network across Scotland to support recreation, tourism and active travel. As part of this are plans for the national network to increase from 6,000m to 8,000km by 2035.

This note outlines the kinds of data relating to use of trails or long distance routes (LDRs) and highlights several useful studies relevant to thinking about the Slate Trail and developing community tourism.

What data is there?

1. *User/visitor numbers*: this is important in its own right and also because estimates of visitors are then used to produce estimates of economic or health benefits, as outlined below. Estimates of usage are based on counting devices on the paths and/or estimates from experts, aggregated to give annual estimates of numbers of visitors. These can be tracked over time, which can be tracked over time, as well as understanding seasonality/ variation over the year. This can be important because it is relevant to thinking about existing patterns of use in relation to local capacity, and the scope for spreading visits to an area out over the year.

For long distance paths this requires placing counters at intervals along the path to capture visitor numbers, as most data on usage suggests that only a minority of visitors to long distance paths walk the whole trail. The balance between proportions vary quite a lot depending on how close the trail is to urban populations. Whole trail walkers may be easier to estimate where there are stamps or certificates for completion.

A report for Scottish Natural Heritage (SNH) in 2014 provides interesting comparative data for a range of Scottish long distance routes (LDRs).² These estimates are based on a combination of counters, surveys, route completion certificates and 'observation and other anecdotal evidence'.³

There are technical and methodological issues with counters: for example the WCP surveys mention malfunctioning, vandalism etc. A 2012 report for SNH noted that few existing long distance routes have 'an effective monitoring strategy in place' and that those routes that

¹ Requests have been sent to the organisations that manage these trails to find out if there is any information about how the routes are used that they can share.

² [SNH Commissioned Report 743: Mull long distance route: A socio-economic study \(nls.uk\)](#) pp.24-27.

³ [Research Consolidation Report.pdf \(nature.scot\)](#) p.5. See a summary of this data later in the document.

had installed counters had ‘struggled with mechanical failure, problems with data download or difficulty analysing data output to produce meaningful figures’.⁴ And even when counters work, they do not distinguish between end-to-end users and those using only one section. Where there are active counters, most use of paths is April-October; and use tends to grow over time after new routes are ‘opened’.

2. *Surveys of visitors which typically collect data on distances walked, frequency of visits etc, as well as origin (local or out of area visitor), motivation, spending and demographic information.* A good example of this are the Wales Coast Path (WCP) surveys which have been carried out several times since the path was opened.⁵ A summary of the most recent survey is provided later in this document.

This data is obviously much richer than simple estimates of use. It is also essential to make sense of the visitor counts and to connect to the wider issues of tourism in the area. However, it is labour intensive, especially if it is to cover different sections of a LDR (there are regional differences with the WCP, for example) as well as different times of the week or year. Some of the data from published studies is probably very relevant for the Slate Trail: for example on demographics of visitors, which seem similar between the WCP and Scottish long distance trails. But the Slate Trail is also likely to have differences from the WCP in terms of proximity to significant local and tourist populations, which will reduce the total number of visits and also may affect the profile of visitors.

3. *Economic impact/ spending:* Scottish and WCP studies present data on average spending and its local impact. Data comes from official statistics or from visitor surveys directly, with a large difference between local visitors and those in tourist accommodation, even when the accommodation costs are excluded (visitors to the area spend more than locals⁶). Combining estimates of total visitors and average spend allows estimation of total spend in a year for example. These numbers do not distinguish between spend that directly results from the existence of the trail (i.e. from visitors who would not otherwise have come to the area) and spend that would have gone to some other local attraction/ businesses (i.e. visitors who would still be here without the trail and would have done something else in the area on that day/ spent money elsewhere).

SNH includes estimates of £9 average spend⁷ per visit for outdoor visits including walking or cycling (including those who spend nothing); and hillwalking is estimated to contribute ‘in excess of £65 billion’ to the Scottish economy (p.7). WCP reports also cite an average per person spend of £9 using their survey method (£19 per group -see more details later).

There is quite a lot of variation in the Scottish data on average spend. Eg on the John Muir Way which has a high proportion of local users, 29% spend money during their visit with an average of £3 in 2014/15 (including those that spend nothing). In contrast on the Fife

⁴ [SNH Commissioned Report 743: Mull long distance route: A socio-econominc study \(nls.uk\)](#) p.23

⁵ These reports are all available from [Wales Coast Path / Our Reports](#)

⁶ The SNH (2018) report (pp.22-23) cites data from the Great Britain Tourism Survey which estimates numbers of tourist trips (i.e. trips involving at least one night away from home) to produce estimates of how much is spent by tourists on trips that include a short walk or a long walk. This produces much larger numbers than the £9: average spend per trip including a short walk (up to 2 miles) £314 or long walk (>2 miles) £375 for those staying away form home; and £37 and £19 for day trippers on short and long walks.

⁷ The £9 comes from the 2012 Scottish Recreation Survey (SNH 2018, p.20), most commonly food and drink (23% of visits). This includes all outdoor visits so presumably covers visits to a local park on foot as well as travelling to walk. Only 2% of outdoor visits incur costs either for car parking or for public transport.

Coastal Path, 60% spend money; £26 on average (2007). The reports don't note this but the amount spent will also depend on the extent and range of facilities on or just off the route, as well as on the profile of users. More remote paths will offer fewer spending opportunities.

Estimates of the economic impacts of new individual paths are also presented eg John Muir Way cost £2m and is expected to generate £16.3m in direct expenditure and create or safeguard 700 FTE jobs in the first five years from coast-to-coast walkers (includes accommodation) plus £8.8m and 384 FTE jobs from day trippers. Similar studies have been conducted for other proposed routes eg Mull LDR in 2014.⁸

4. *'Health' benefits*: beyond trying to capture the economic contribution of visits to walking trails based on how much is spent locally, a smaller number of studies try to estimate health impacts arising from the walking activities. At one level this is an obvious thing to do given the well-known benefits of walking in terms of physical and mental health, including reduced social isolation, contact with nature etc. However, the standard way of capturing 'health benefits' is to use a tool (HEAT) developed by the World Health Organisation which aggregates physical activity and converts it into reduced mortality. At the simplest level x hours of walking saves a life, and that life saved can then be valued. HEAT is used in a 2014 study for NRW on the economic impact of health benefits arising from use of the WCP.⁹ This methodology clearly fits with standard approaches¹⁰ to putting economic values on reduced mortality but it provides a very narrow view of the health and wellbeing benefits of walking on a trail. Such methods will also miss outcomes such as appreciation of landscape, nature, history and culture etc which visitors to the trail may experience, as well as developing habits (using walking trails) that inform future use of leisure time. Significant here is a finding from Scottish studies that those who walk trails tend to do this again in other places, thus contributing to enhanced wellbeing over time through developing 'healthy' habits.

The SNH review of long distance trails does not estimate the value of health benefits but cites general evidence on why people visit the outdoors and the benefits from this. The most frequent reasons for 'visiting the outdoors' are 'health and exercise' (43% of outdoor visits) and dog walking (42% of visits); to relax and unwind (27%), to enjoy peace and quiet (13%). These reasons may be slightly different for long distance routes, especially those that require more travel to access, but there appears to be a lack of specific data on this in Scotland.

5. *Return on investment measures*: The SNH 2018 report notes that 'the expected spend to benefit ratio for investment in paths is 1:7' where benefits include 'economic, health,

⁸ [SNH Commissioned Report 743: Mull long distance route: A socio-economic study \(forestryandland.gov.scot\)](https://forestryandland.gov.scot)

⁹ Usage of WCP is estimated at 23,688 people walking an average of 4.38 miles per week (over 1.6 visits per week). This level of walking would prevent 7 deaths per year among the walking population, compared with people who do not walk regularly, according to the WHO's health economic assessment tool (HEAT). This leads to an estimate of £18.3m per year of economic value of health benefits. [Economic assessment of the Health benefits of walking on the Wales Coast Path](#)

This report for NRW is mainly concerned with methodological issues including unreliability of counters. Given the expense of conducting surveys which are needed to obtain the information about usage, it seems rather a lost opportunity to explore health and wellbeing benefits in a much wider sense.

¹⁰ Similar surveys have been conducted on other coast paths eg SW Coast path, Fife Coastal path.

environmental and social benefits'.¹¹ This seems to be based on investment required to build or upgrade to create a new waymarked long distance route.

Overall, there is some useful data and pointers about other LDR routes which will be helpful in thinking about the Slate Trail, though all the data needs careful interpretation. Just as importantly, it is important to note that most of the publicly-available data is narrow and concerned with measuring volumes and values to allow aggregation. There is very little evidence of understanding the use of trails by different kinds of people or groups for different reasons, the challenges encountered and the wide range of beneficial experiences and outcomes. There is an opportunity to think about how the limited amount of resource that will be available to research the Slate Trail could be used in a creative and innovative way to collect insightful and relevant information to identify opportunities and challenges for community tourism, as well as to better understand the values created by the trail.

Useful studies and their findings

1. The Wales Coast Path (WCP) has been the subject of several surveys and evaluations: two visitor surveys ([2015](#) and [2019-21](#)); an [economic assessment of health benefits](#) (2014) and an evaluation of [economic benefits to business](#) (2013). There have also been two earlier evaluations linked to the £4m of ERDF funding from 2007-13: [one compares achievements to targets](#); the other [assesses output and employment benefits](#). These reports are produced by various consultancies for NRW which was responsible for establishing the WCP and involve considerable resources. For example the 2019-21 visitor surveys include 1,519 interviews at 58 sites along the 870 miles of the WCP.

The 2019-21 visitor surveys provide data on: numbers and profile of users, how people travelled, how long they stayed (most of the users were visitors), how much they used the WCP (number of times, distance and time travelled), and how regularly they came. The survey also covered awareness of the path name, reasons for use of the path, information sources, spend and satisfaction (and in 2021 whether they felt Covid-safe). 'Satisfaction' included whether users of WCP felt 'that using the Path has contributed to their appreciation of Wales and its culture' (88% yes). The summary below comes from the Executive Summary. The main body of the report has more detailed breakdowns, including by section of the path for some questions.

Most users travelled 'relatively short distances': 58% travelled up to 2 miles on the WCP; 31% travelled 2 to 5 miles; and 11% travelled more than 5 miles on the Path. Average time spent was 1 hour 56 minutes. Motivations were: scenery/views 66%; health/ exercise 56%, fresh air/ enjoy pleasant weather 54%, relax/ unwind 45%. 94% of respondents were walking; 4% cycling, 2% other (assisted mobility vehicle, horse riding etc). Most respondents (60%) travelled less than 5 miles to reach the WCP from where they stayed the night before; 67% by car or van; 27% walking and only 7% by other means (including public transport).

91% of respondents were repeat visitors (first time visitors 9%); and most were frequent users (63% used the WCP once a month or more often). 42% of respondents were staying visitors (overnight or

¹¹ [Research Consolidation Report.pdf \(nature.scot\)](#) This ratio is cited in several places and seems to come from consultants.

longer – 6.4 days on average for stayers); this was slightly higher in 2021 perhaps because international travel was more difficult in the May/June survey period that year. Most visitors (79%) intended to use WCP on more than one day; 54% intended to use different sections of the path (8% were walking continuously over part or the whole WCP on this or separate trips). Most visitors did not use any information sources (70%); maps were the most frequently used (especially for first time users).

Average spend within 10 miles of the path (excluding accommodation) was £19 (£9 per person), with a large difference between those who were staying (£33) and day visitors (£10). Of the average £19, £10 was spent on the path (including start and finish points). Average accommodation spend was £77 (£37 pp). Camping and caravan based stays were the most common (43%). Types of accommodation varied by region eg Gwynedd 49% caravan (including motorhomes, static and touring), 20% self catering, 13% camping, 12% hotel/ B&B. Spend was higher in some regions (eg north sections) and on average higher in rural than urban sections.

Visitor profile: 48% male, 52% female (UK average 49/ 51%). Average age (excluding children) was 53 years (UK mean = 47 years); 52% of users were >55 years (UK mean 40%). ‘There was a fairly pronounced skew towards an ABC1 demographic’. 72% used WCP with at least one other person (most commonly spouse/ partner 38%, 16% family with children, 12% friends, 9% family with no children); 28% used the path alone. Average group size 2.3 (2 adults, 0.3 children).

Most respondents (62%) were Welsh residents (who generally live close to the path); 35% from England and 2% from outside the UK. 17% of respondents were Welsh speakers (no regional breakdown) and 3% chose a Welsh language interview. For users of the Gwynedd section, most English visitors were from NW England. Visitors from England were typically a higher % in the summer months (45%). 98% of respondents were White (2% minority ethnic groups, UK average is 3%). 15% of WCP users reported that they or another group member had a limiting illness/ disability.

For a slightly different perspective, there is a 2020 PhD thesis by Amy Jones on walking the WCP <https://cronfa.swan.ac.uk/Record/cronfa56844>. Chapter 1 is worth a read as it contains useful information about the creation of the path and expectations about outcomes, and further development beyond the establishment phase. (NB/ the data here is from the 2014 survey). The objectives of this research include understanding how walking on the WCP ‘facilitate a sense of cultural pilgrimage and feelings of attachment and commitment to Wales’. The study is based on those walking the whole length so it’s focused on those completing a long distance trail, rather than casual or episodic walking on long distance routes. It’s an academic publication but is engaging and useful in considering the act of long distance walking and what it means to people.

Scottish Natural Heritage 2018 report¹²

This is a very helpful report that brings together all kinds of information about existing and planned long distance trails.

For examples, it includes estimates of route users, where these exists, but also notes that there is relatively little data on upland paths like the Ben Nevis mountain path (pp.5-6). The user estimates are highest on LDRs close to urban areas eg Fife Coastal path 0.5m per year (35,000 end to end

¹² [Research Consolidation Report.pdf \(nature.scot\)](#)

users). The Moray Coastal trail, which is further from the major Scottish urban centres, has a much lower estimate of 23,000 per year (1,000 end to end visits).

Fife Coastal path: 500,000 visits, including 35,000 end to end users
 John Muir Way: 240,000 - 300,000 visits, including 4,900 - 6,000 end to end users
 Clyde Walkway: 155,000 visits, including 7,750 multi-day or end to end users
 River Ayr Way: 137,000 visits, including 41,000 end to end users
 West Highland Way: 120,000 visits, including 36,000 end to end users
 Southern Upland Way: 80,000 visits, including 1,000 end to end users
 Speyside Way: 52,750 visits, including 2,750 end to end users
 Great Glen Way: 30,000 visits, including 4,500 end to end users
 Moray Coastal Trail: 23,000 visits, including 1,000 end to end users
 Borders Abbeys Way: 15,000 visits, including 2,380 end to end users
 Cateran Trail: 8,000 visits West Island Way: 6,000 – 7,000 visits Ayrshire Coastal Path: 3,000 visits
 Rob Roy Way: 3,000 visits, including 450 end to end users
 Dava Way: 3,000 visits, including 400 end to end users
 St Cuthbert's Way: 2,579 end to end users
 Three Lochs Way: 1,500 visits, including 300 end to end users
 Kintyre Way: 1,000 – 2,000 end to end users

Mull long distance route: A socio-economic study (2014) – a commissioned report for SNH¹³

This interesting report on a proposed new long distance route (LDR) on Mull contains useful data and key points because it takes a wider look at who might use the route and why (this is touted as a pilgrimage trail), and the need for services on and around the route for walkers.

p.5 There is an increasing demand for LDRs including the growth of 'serial LDR users or route baggers', who after finishing one LDR look for the next one.

p.6 There is some older data on the profile of long distance walkers based on annual or sporadic surveys of users on the Great Glen Way (2012, annual), Southern Upland Way (2004) and Fife Coastal path (2006-7). There are some difference between these paths e.g. more international/ non-UK walkers on the Great Glen (40%) compared with Fife Coastal Path (4%), but overall there is similar demographic/ socio-economic data to that from the WCP surveys. For example: half of users of the Fife Coastal Path were 55 or over; 67% ABC1 social class; but also very strong local use for short walks.

pp.11-12 What factors shape the popularity of LDRs: scenery (and variety), good paths (& not too much tarmac) and waymarking, public transport accessibility of start and finish; availability of support services (eg baggage transfer), accommodation at intervals; distance achievable in less than a week (for those doing the whole trail).

pp.13-14 An interesting discussion of accommodation availability on the proposed Mull trail (suitability and capacity; acceptance of one night bookings by providers) and provision of refreshments on or near route (based on research on what is locally available and its suitability). There is discussion of the scope for development of other services (eg baggage transfer, picnics,

¹³ [SNH Commissioned Report 743: Mull long distance route: A socio-econominc study \(nls.uk\)](#)

centralised booking services and tours) (pp.33-7). The review of benefits of LDRs is based on other studies (especially SW Coast Path and Fife Coastal Path) (pp.38-)

pp.21 The report highlights a lack of data to understand the likely interest in the proposed Mull LDR from either visitors to the area or 'local community interest'. This is an interesting aside because there is little discussion elsewhere in such reports about local use of trails and its significance.

pp.29-31 There is discussion about pilgrimage routes specifically, including the growth in popularity of the Camino de Santiago (and other routes in Spain) and a comparison with a new national pilgrimage route in Jutland, Denmark which has had far fewer walkers than expected. A key enabler of growth in Spain was availability of hostels and other low cost accommodation. This was planned into the Danish route including funding to convert farm buildings into hostels still owned by farmers. However, provision of accommodation was not enough to attract the large numbers planned for. Several reasons were cited: the Danish route is level, easy-going and accessible but rather samey and lacking contrast in landscape, topography etc; too much tarmac on the route to be attractive to walkers; weather; 'less religious fervour'; not all walkers wanted budget accommodation; poor marketing and co-ordination.