The European market potential for walking tourism

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Interest in walking activities and/or holidays is increasing in most European countries. A large share of walkers are characterised by their interest in discovering remote destinations and immersing themselves in local cultures and cuisine, history and heritage, food, cultural attributes and wellness. They are also eager to contribute to local economies and are environmentally conscious. When properly developed and managed, investing in walking tourism will pay off for you as well as for the community.

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1. Product description

UNWTO sees walking tourism as “one of the most popular ways to experience a destination”. Walkers are autonomous. They tend to explore on their own instead of opting for a package trip. This changes when walkers go abroad for walking. Walking is often combined with (other) recreational, natural, cultural, wellness or culinary activities. This depends on the nature of the trip and the demands of the target group that you have in mind. Walking can also be the prime motivation of walkers.

Obtaining authentic experiences from the trip, and/or experiences that lead to change in human attitudes and/or behaviour, and/or that positively impact destinations that are visited, are key aspects. Travellers aim to contribute positively to local communities, both by being aware of their impact on the environment and financially. Walking tourism often strengthens local communities and is widely regarded as a sustainable activity with low impact on the environment.

Walking tourism refers to trips in which walking in the natural environment forms a significant part of the trip. It includes specialist niche markets such as hiking, trekking, long-distance walking, specialist walking (such as Nordic walking), hillwalking, rock climbing, scrambling or alpinism, mountain walking, mountaineering, backpacking and gorge walking. Some specialist niche markets overlap with sports tourism. See Table 1 for an overview of the specialist niche markets and their characteristics.

Table 1. Specialist niche markets, characteristics, description of the market

Specialist niche markets	Characteristics

Hiking	Hiking generally demands more effort than walking. The activity often involves (long) energetic, but easy, intermediate or challenging walks through rocky, hilly and remote natural landscapes on designated (and sometimes complicated) natural trails and/or footpaths. Hiking may be differentiated into three types: day hiking, summit hiking, long-distance hiking. A trip lasts a day or with overnight included and spans between 4–50 kilometres.
Trekking	In trekking, the duration of the trip is longer and usually starts from two days onwards. On average, seven hours a day, a few days in succession, are spanned. The amount of kilometres that is walked lies between 50 and, in rare occasions, even 24,000 km. Trekking may follow off-road directions (cross-country, unpaved roads, in complete wilderness, higher altitudes), but may also be carried out on established trekking routes with corresponding tourist infrastructure. An example of trekking are pilgrimages.
Long-distance walking	Long-distance walking is more than escaping everyday life for a few hours. It typically takes a day or at least a walk of 30 km. In many destinations, there are special designated long-distance footpaths, which sometimes include (basic) accommodation facilities along the way. Differences in elevation may be crossed, often on rough terrain. Long-distance walking crosses varying landscapes, which makes it a favourite activity for many Europeans.
Specialist walking (Nordic walking)	Specialist walking, like Nordic walking, is roughly defined as an activity in which walking through the countryside is central with the help of long poles. Nordic walking originated in Finland in 1997 as a means for cross-country skiers to train in the summer period. General walkers took over the means and also countries in Europe saw an increase in Nordic walkers in the past years.
Hillwalking	Hillwalking is the British equivalent for walking in hills and mountains and comparable to hiking. Often, challenging and rocky terrain is encountered.

Rock climbing / scrambling / alpinism	Rock climbing/scrambling involves a mixture of walking and climbing. It is often a technical walk and climb towards a specific destination (for example: a summit). The activity lies somewhere in between hiking and mountaineering. Rock climbing/scrambling is usually carried out by using one's hands on steep and sometimes difficult and varied terrain. No extremely steep slopes and glaciers are included in the trip. Participants may walk through, climb on, and encounter talus, scree, streams, (dense) shrubs and snowy slopes.
Mountain walking	Mountain walking generally takes place up to an altitude of 3,000 meters above sea level. Mountain walking usually does not require any special equipment to provide walkers with safety. Trails differ from a paved and flat or sloped surface without any danger of falling down, to trails which are not always visible, difficult to access parts that can be secured with ropes or chains at which there is a certain risk of falling, or trails in which (some) rambling is involved.
Mountaineering	Mountaineering involves climbing above an altitude of 3,000 meters above sea level in risky, rocky and snowy areas, and requires a high level of confidence, physical fitness, mental condition and many years of experience in other disciplines. Mountaineers should be able to survive in (very) tough conditions. A set of well-developed technical skills are essential and specific equipment and training are required. Long preparation is essential. Trips may last between a few hours until a few weeks.
Backpacking	Similar to hiking. Backpacking is usually done for multiple days and therefore requires more preparation and equipment.

Gorge walking	Gorge walking (in other words: gorge scrambling) is carried out on rocky terrain in mountain streams. A typical activity generally passes waterfalls, pools, chutes, rocky steps, holes and slides. The UK Scout Association defines gorge walking as: “following a river bed through a gorge”. Depending on the environment in which gorge walking takes place, physical activities in this subtype of walking tourism include climbing, abseiling, jumping, sliding, walking and swimming. Canyoning, canyoneering and ghyll scrambling are often confused with gorge walking but differ in the level of adventure that goes along with the activities. While canyoning and canyoneering are generally more adventurous, ghyll scrambling is less so. Gorge walking is somewhere in between. An activity usually lasts between three and four hours.

Below, some examples of tour operators are listed that offer walking or specialist niche market activities and/or holidays in developing countries. Most tour operators that offer opportunities for walking (in developing countries) are based in the United Kingdom, since the demand for walking holidays is considerable here.

Table 2. Examples of tour operators that offer walking activities/holidays in developing countries

Organisations	Type of activities offered
Walks Worldwide	Offers guided, private-guided, self-guided, centre-based, classic routes, coastal walks, culinary walks, cultural discovery, nature, point to point, short breaks, snowshoeing, solo walking.
Explore!	Offers walking & trekking, solo walking and self-guided.
Lopus Wandelreizen	Offers walking holidays.
HT Wandelreizen	Offers walking, trekking and expeditions.
SNP Natuurreizen	Offers activities in mountain walking, group walking holidays, trips from cabin to cabin, short walking holidays, walking holidays with dogs, individual walking holidays, short trekking adventures, snow walking.
Explore-share	Offers hiking, mountain climbing and rock climbing activities in a variety of destinations.

G Adventures	Offers hiking and trekking itineraries for several target groups to several destinations in developing countries. They also offer wellness tours.
Exodus Travels	Offers several activities such as self-guided walking holidays, summits, centre-based, point-to-point, coastal walks, desert treks and wildlife walks in combination with other features to a variety of destinations worldwide.
World Expeditions	Offers mountaineering, trekking, hiking and walking to numerous destinations worldwide.
10 Adventures	Offers hiking, pilgrimages, walking, trekking and climbing to several destinations in developing countries. Other activities related to walking tourism are also organised.
Naturetrek	Offers all sorts of trips, among which are walking, wildlife, birdwatching and photography, to several destinations worldwide

Walking tourism as part of adventure tourism

Walking tourism is usually perceived as a soft adventure, slow and/or special-interest tourism activity that is typically covered under the adventure tourism and/or nature-based tourism umbrella. Activities mainly take place in natural/rural environments. It is also closely connected with community-based tourism. Given the nature of the type of tourism, it may stimulate its users to positively impact the destination they visit, as a result of engaging actively and meaningfully with a range of its aspects.

Figure 1: European tourists hiking in nature

Source: Freepik

As a result of travellers' increasing search for escapism, meaningfulness, once-in-a-lifetime experiences, transformational and authentic experiences, ageing, active lifestyles and holidays and physical and health activities, adventure tourism is the fastest-growing tourism sector globally: from 2019 to 2026, 13.3% growth is expected. Walking tourism is regarded as a market with high potential (also already before corona). Adventure seekers increasingly opt for walking activities in itineraries.

Soft and hard activities in walking tourism

Walking tourism is considered a soft activity. Activities typically last a few hours and no or less (specific) skills, training or equipment is needed. In soft activities, usually a range of motives play a role. Being active and exploring the destination in depth by foot is central in walking tourism. Often, a wide array of side activities are part of a trip (such as wildlife watching). As such, walking is often seen as a means to experience and/or achieve something else.

In some specialist niche markets, the duration of a trip may take up to a few weeks or months. Some of these markets overlap with sports tourism and demand more specialist skills, training, preparation and investment in gear and equipment (for example in mountaineering, trekking). Given the difficulty of such activities, and the risks and sometimes extremeness that is involved, they are regarded as hard activities. In hard activities, often one main motive or a few motives relating to self-achievement play a role.

Soft activities usually attract a broad audience, given their relative ease, but you might face more competition. Hard activities are more applicable to a narrow audience due to their toughness and/or extremeness. You may consider soft activities as they offer more potential and opportunities, are more profitable in the long run and they require less expertise and investment for you as a provider of the activity.

Benefits of walking tourism for destinations

UNWTO suggests a range of cost-benefit pros that destinations can achieve by developing walking tourism. Proper development and management need to be taken into account. Please read the UNWTO's study for more benefits of walking tourism. They also connect to the United Nations' Sustainable Development Goals.

- Walking tourism often provides local communities and businesses with financial benefits. Examples are spending in local facilities (homestays, tiny lodges), offering of local products and local gastronomies.
- It may encourage communities to be involved in tourism by seizing new business opportunities and creating jobs/employment for locals.
- Walking tourism may lead to improvements in local living standards.
- Yields gained may be used for investing in maintaining certain facilities for both tourists and residents (for example: routes/trails maintenance, facilities, natural and cultural conservation), in training/education for locals (for example: guide training/education for locals, hospitality courses, marketing training, bookkeeping), or as investment outside the specific tourism market (for example: housing, education, access to healthcare).

Walking can be done in almost all environments, providing that footpaths and (potentially) attractive routes are available. Fancy footpaths are not always needed, or not needed at all, for some products in walking tourism, such as in mountaineering. Walking routes generally go through extraordinary and varied natural landscapes in which sometimes obstacles, rough terrain and fast-changing climatic conditions are encountered.

Potential of investing in walking tourism

Investments made in walking pay off. On average, every €1,38 invested in the development of walking tourism yields almost €18. Therefore, walking tourism may offer you a profitable market.

Some of the world's most striking routes/trails are listed in the table below. This is just to give you an idea of what a walking trail might lead to in the long run. Yet, also the growing demand for walking in society is recognisable here.

Table 3. Examples of best practice trails

Destination	Trail	Type or trail	Best practice
Jeju, South-Korea	Jeju Olle Trail	Long-distance	Number of visitors rose from 3,027 in 2007 to 950,541 in 2017
Spain	Camino de Santiago	Long-distance / pilgrimage	Number of visitors rose from 55,000 in 2000 to 300,000 in 2017
Italy	Via Francigena	Long-distance / pilgrimage	Number of visitors increased with 20% in 2018 to 50,000 in total

2. What makes Europe an interesting market for walking tourism?

The interest in walking increased over the past year in almost all of Europe. Overall, the corona pandemic may be regarded as one of the reasons for the increasing interest in being outside, simply because it was one of the few activities that was still possible to carry out in parts of 2020 and 2021. A part of the 'new walkers' will stay in the market and gradually develop their new-found hobby. However, already before corona, the market for walking tourism grew steadily every year.

Allied Market Research forecasts that the global adventure tourism market, of which walking tourism is a part, will significantly increase with 13.3% per year from 586.3 billion dollars in 2018 to 1,626.7 billion dollars in 2026. European countries contribute most to the global adventure tourism market. It is predicted that this will remain unchanged: from 2019 to 2026, the market grows with 11.9% in Europe. Demand in both soft and hard activities is estimated to grow. Note that these are pre-covid estimations, but nevertheless give an idea of the potential of this niche market.

50% of all European tour operators are active in walking tourism, which puts it in third place of the most-offered niche markets to consumers in Europe. Among European tour operators active in adventure tourism, this percentage is as much as 80%.

The growth of walking tourism (overseas)

Even before the corona pandemic, the market for walking tourism grew every year. The corona pandemic and its effects has accelerated societies' motivation in spending time outside (in nature). Walking/hiking is regarded as the main activity to perform in nature. This also has its drawbacks. Some nature areas were, and are still, overflown with recreational walkers that spend a few hours in nature for leisure purposes. They may damage valuable nature.

A part of the walkers that started walking during corona times are expected to stay in the market and some will gradually opt for developing their hobby.

Market segmentation

Walkers from Europe have money to spend, education levels are quite high and a share of the Europeans are experienced travellers that prefer gaining new experiences and meaning from the trips they make.

Walkers from Europe are explorers. They are eager to know what is around the corner and enjoy exploring a destination and region in a less common way than most travellers. Most of the time, absorbing the natural, cultural, historical and culinary aspects of a place in a slow or active pace is central in their motivation, just as meaningfulness, tranquillity and unwinding. Walkers want to learn something new when they are on a walking holiday. Other types of walkers prefer challenging adventures in which a certain performance can be achieved.

Walking tourism spans solo travellers to travellers that travel with friends, a group, in couples and/or with families. For most walkers, different motives play a role. The level of a walking activity depends on distance, duration, terrain, changes in elevation and weather conditions.

Walking may be part of a tourism package, the sole activity during a holiday or not part of a package at all. Some walkers want reliability (for example safe, marked/defined and/or guided routes). They regard walking as a soft, casual or intermediate activity and a means to also explore other features of a destination.

Others opt for unique, difficult or extreme routes (for example unpaved, rocky, chasms, climbing involved), walking on terrains without paths and in tough conditions. They regard walking as a challenging, serious or extreme adventure activity. Achieving a certain performance and/or enhancing their health condition is key. The offering of side-activities is not really applicable to them.

UNWTO (2019) distinguished walkers into three segments:

- walkers for which walking is their prime motivation (serious/committed).

- walkers for which walking is one of the activities that they undertake during their holidays (casual).
- walkers that wish to work on their health while walking (both physical and mental) and performing other healthy activities (healthy walkers).

Table 4. Segmentation of walkers (UNWTO, 2019)

Segment	Motivation in walking	Type of walking (routes)
Serious/committed walkers	• High • Experienced walkers looking for something new, extraordinary • (Very) critical towards the walking products and services that are delivered • Sole activity undertaken during holiday	• Quality of offered products that make up a walking tourism package should be high • Walking routes should be relatively difficult • May be eager to participate in long walking itineraries (multiday tours, tracks)
Casual walkers	• Medium • One of the activities undertaken during holiday	• Walking generally makes up between 0.5 and 2 days of a holiday • Preference for recreational/leisure, easy/moderate walks • Walking is meant as a way to explore and experience a destination, its local people, culture and nature
Healthy walkers	• Medium to high • Enhancing or protecting health as a driver, for which walking is one of the activities to be undertaken	• Walking activities should meet personal health conditions • Walking activities along with healthy activities (wellness, food, etc.)

The Dutch Wandelnet foundation segmented Dutch walkers into the following categories by using the BSR lifestyle model. However, this segmentation applies to other Western European countries as well.

Table 5. The Dutch walker segmented by the BSR lifestyle model

Type of walker	Who	What	With	Trail characteristics
Adventure walker	Women, 25–34 or 45–54 years old	• Off-road • Getting to know new environments • Unwind • Taking nice pictures • Encounter special animal(s)	Alone or with friends	• Unpaved • No signage • Alternated • Narrow and less walked paths
Cultural walker	More often women, 65 years or older	• Reliable routes • Routes need to be in good shape • Pleasant company	Friends, relatives, family	• Attractive environment • Combination of culture and nature
Organised walker	Women, 55 years or older	• Organised • Marked walking tour • Resting points included • Information on health	Partner, family, group	• Route must deliver the possibility to unwind • Marked by professionals • Clearly described • Varied • Possibilities to rest • Sanitary facilities

Social walker	45 years old or younger	• Prefers tours of 1–2 hours, sociability is central • The presence of catering facilities on the trail are considered important	Family, friends	• Catering facilities included • Little adventurous
Performance walker	Men, all age categories	• Sportive challenge	Alone, participant walking event	• Route tracking independently • Either physical challenge or pretty environment • Enough to experience
Quiet/Calm walker	More often men, 25 years or older	• Clearly defined route • Easy to reach starting point • Photographing is part of the experience	Alone, partner	• Lots of forest, nature • Little or no background noise (for example: highways)

Increasing popularity of walking tourism among younger age categories

Walking tourism in general is undertaken by different age groups in varying compositions, but the majority of the walkers are slightly older (above 55 years old). A rise is seen in younger populations who demand different aspects of walking trips (hard activities) than elderly. Young people, students and DINKs (people with double income and no kids) are increasingly seen engaging in walking tourism.

Families with older children (over 20) are also a target group that is eager to explore destinations by foot. The mentioned target groups are generally fit and especially DINKs have money to spend on such activities.

In specialist niche markets, relatively more younger age categories are present given the nature of most trips.

Expectations among younger age categories in walking tourism

Younger generations tend to focus more on self-guided walking holidays, in which flexibility and independence can be pursued. Trips are usually more attractive from a cost-benefit point of view.

Younger generations are more willing to undertake hard activities and challenge themselves. Millennial tourists are increasingly eager to participate in unusual tourism activities and acquire new experiences. According to GFK, both Gen Z and millennial tourists are most active during their holidays, especially before having children. Adults with younger children enjoy less active holidays. They return when the children grow older or have moved out.

Expectations among older generations in walking tourism

Older walkers above 55 years old generally focus on soft activities. Gaining cultural and nature-based experiences is often central. They generally have money to spend and focus more on low-risk activities, although they may be looking for physically challenging activities. As a result of ageing, improved health conditions and the desire to remain active at a later age, the share of older Europeans will continue to grow and, thus, the market potential.

Tips:

Target a specific segment with an offering that fits their specific needs. Start by creating personas and use the market segmentation in this document to find the products that are best offered to this target group. For more information, read our report on how to develop your tourism product.

Determine your unique selling points. Start by finding out your destinations' unique details, like having the highest or steepest rocks in an area to attract rock climbers, possessing the most thrilling trail, the most authentic dishes or the best wellness experience for cultural, casual, social and health walkers. Every place has unique details. For more information, read our report on how to determine your unique value proposition.

Monitor the number of walkers in fragile nature areas, if you wish to set up walking tourism or increase the number of walkers from Europe to your destination. There are examples of popular walking/hiking trails that attract high numbers of visitors resulting in negatively impacting the environment and communities.

3. Which European countries offer most opportunities for walking tourism?

The United Kingdom, Germany, the Netherlands, France and Spain are important source markets to focus on as walking and/or specialist types of walking are undertaken quite frequently in these countries. In most source markets, walking is mostly considered as a recreational activity and less as a sport.

In Eastern Europe, walking as a sportive activity (in groups) is becoming popular and walking infrastructure is more and more developing here. Although walkers from Eastern Europe mainly walk in their own countries, it may be considered a potential source market for the (distant) future.

United Kingdom: Walking tourism is hot among the Brits

The United Kingdom offers the largest adventure tourism market in Europe, accounting for 19% of the world's adventure travel tourists. Out of all British tour operators active in developing countries, 87% were active in at least one adventure tourism niche market. Walking tourism is, after wildlife watching, the United Kingdom's most important tourism product that is sold among Brits. A considerable amount of tour operators that offer opportunities for walking holidays/activities abroad are based in the United Kingdom.

Walking is the most popular leisure activity among Brits and has taken over from walking as a necessity or walking for practical reasons. Especially among generations over 50 years old, the demand for adventurous and active holidays is growing. In this regard, walking holidays are much preferred, a study by HF Holidays found out. Approximately 28% of UK travellers participate in walking activities when they are on holiday.

Walking holiday packages are often sold in combination with cultural activities, wildlife, art and culinary elements. This caters to the interests of Brits that are eager to explore destinations by foot. Health and wellbeing are central among Brits, just as exploring the countryside, unwinding and reconnecting with nature. Brits find companionship and good accommodation important in a walking holiday. Both aspects were marked almost as high as the experience of the walk itself.

The environmentally responsible nature of walking holidays as well as the social aspects (for example meeting new people and friends) is mainly of interest to individuals that are 65 years or older. Brits mainly prefer walking individually (alone or in couples). Undertaking hiking and trekking activities are less popular among Brits. Starting at an early age with nature education in elementary schools in the United Kingdom leads to more willingness to participate in nature activities at a later age.

Hiking and Nordic walking are very popular among German travellers

After the United Kingdom, German travellers make up a large part of travellers in adventure travel. The country accounts for 12% of the world's adventure travel tourists. In Germany, 17 million people went on a walking holiday in 2019. Among Germans, the age category that walks most is 50–59 years old. Germany has a lot of walking clubs. This country is also famous for their 'Volksmarching'. Walking is especially popular among women.

According to a study by Beyond Summits, German outbound tourists are very interested in hiking in nature. It is even in the second place of all favourite activities undertaken. Next to that, Germans are very eager to participate in Nordic walking. Unspoilt, well-preserved nature and scenery is often central.

Germans, especially in the south of Germany, are interested in mountain walking, sometimes in large groups of walkers (1,000 individuals) that are united in walking clubs. They organise walking trips once a year to countries in Central and Southern Europe. These trips are planned a long time before they actually happen (sometimes even years before).

In case you would like to address and attract German travellers, you need to offer them sufficient information. They tend to seek a lot of information before they decide to visit a place. This means that your online presence is quite important.

Like most Europeans, Germans are quite straightforward in their communication style, but they are also well-known for being organised and punctual. Germans tend to be loyal, which means that they are persistent in the activities they do. When you have grabbed their attention, they will not let you go easily. Germans are generally more willing to participate in organised trips.

The Netherlands: Dutch are eager to spend their valuable time in nature

The Dutch love to be outside: 78% enjoy being in nature. More than half calls themselves an outdoorsman/woman, which is associated with leisure activities such as walking, cycling and camping in green areas. Dutch outdoorsmen/women have a sense of freedom and enjoyment and demand rest. Dutch people older than 45 are more often outdoorsmen/women than younger generations. Among 25% of Dutch travellers, nature is the most important reason in going on a holiday.

Walking is a popular activity among the Dutch, just as biking. Walking is on the first place of leisure activities that Dutch generally like to do. Dutch citizens undertook 424 million leisure walking trips (minimum of one hour walking) and 95 million sportive walking trips in 2018. The popularity of walking among the Dutch increases every year: while 10.5 million Dutch (63%) walked for pleasure in 2016, this amount rose to 11 million (65%) in 2020.

The Dutch like to walk with someone else: of all walks, 43% is carried out with someone (mostly with the partner). Dutch people who consider walking a sports activity generally walk alone. The following motives are important.

Table 6. Dutch motives for walking

Dutch motives for walking	%
To be outside	30%
Relaxation/reflection/clearing mind	23%
Keeping in shape	13%
Getaway	9%
Prevention of unfavourable health conditions	6%
Experiencing nature	4%
Discovering the environment	3%
Performance	2%
Sense of freedom	1%

Among the 35–54 years old category, relaxation, reflection and clearing the mind play a key role in walking. They are also interested in thematic routes (for example culture, adventure, nature). As age progresses (from 55 years old), motives connected to health become more important.

The Netherlands count 1.2 million long distance walkers that walk at least 15 kilometres during a walk. Most walks are for leisure purposes, in which being outside, relaxation and maintaining physical shape plays a key role. Long distance walkers are mainly to be found in the 25–64 years old category. They walk with an average of 2.6 persons and make use of marked routes that are part of a network. They prepare themselves more than general walkers. GPS, maps, guidance and signposts are all important.

Most Dutch walkers are in the age category 25–65 years old (60%). Approximately 22% of walkers is under 25 years old and 18% is 65 years or older. Walkers between 45–55 years old contribute most to the amount of walks that are made.

The growing consciousness in Dutch society about being healthy, pursuing active lifestyles and ageing also affects the quest for sportive activities during holidays, among which walking and cycling are most important. It is expected that walking and cycling holidays continue to grow in the future.

In 2015, approximately 1.4 million Dutch people were willing to participate in a walking holiday in the coming three years. This number rose to 3.3 million Dutch in 2019. The most important motives for participating in walking holidays are experiencing nature (51%) and being in the outdoors (41%).

The Dutch love to be involved in multiple-day thematic routes (for example: cycling, culture, culinary, walking). This market is growing. Both participation in domestic as well as international walking holidays is proportional among those interested.

France

Walking is the most preferred activity among the French, especially among women. Twenty years ago, France counted 3 million dedicated walkers. This number has only been growing in the years since. Nordic walking is a popular pastime. Hiking and trekking are less popular.

The French are less willing to participate in organised walking holidays and prefer to explore destinations on foot themselves.

Spain

Spain is an important market for walking tourism, as travellers strongly prefer making adventure trips. The interest in walking in Spain is mainly driven by Santiago de Compostela, which is the arrival place for the world-famous Camino de Santiago pilgrimage. From here a network of different routes across Spain and Portugal have been created. Although the Spanish like to explore natural environments, they prefer cultural elements of a destination, according to Brandwatch. Among the Spanish, hiking is more popular than walking.

Tips:

- Connect with the European Ramblers Association (ERA) in order to find your way into the European market. If you would like to get directly into contact with national walking associations, Wandelnet (the Netherlands), Ramblers (United Kingdom), Deutscher Wanderverband (Germany), Fédération Française de la Randonnée Pédestre (France) and Federazione Italiana Escursionismo (Italy) are some important stakeholders when setting up walking tourism products for these specific source markets.
- Take country-specific characteristics into account. All source markets have certain characteristics when it comes to their walkers. Walkers from one country expect something different from a walking trip or activity than others.
- People over 55 tend to organise themselves and are more loyal to their hobby. They are by far the largest population when it comes to memberships of walking clubs. Moreover, they see walking more as a group activity. Younger age categories are more unorganised and are generally less loyal towards their hobby. They do not pin themselves down on only walking, but rather undertake a bunch of different activities when they are on holiday.
- Highlight the elements that are especially appealing to younger generations in your marketing. Younger generations opt for gadgets and activities such as GPS tracks and geocaching. They also find gathering once-in-a-lifetime experiences, self-reflection, education, and endurance really important aspects in the activities they undertake.
- Offer special walking packages for retired people, students that need some time to think over their future steps, people that suffer from burnouts or divorces. Offer them possibilities for self-reflection, self-development through walking and matching side-activities.

4. Which trends offer opportunities on the European walking tourism market?

The ‘new normal’ way of travelling perfectly suits walking tourism

Before the pandemic, travellers wanted to take several (short) breaks/holidays a year. The tendency is now moving towards fewer, but richer experiences. This is especially a result of the financial constraints many travellers have to deal or have dealt with. Opposed to that, 42% of travellers in a study carried out by Booking.com would travel more in the future and see it as a necessity. In addition, 61% of the respondents are more appreciative towards travel and consider it to be something that is not so certain as it used to be in the past.

A countertrend in regard to richer experiences is that experiences should not be over the top per se. Especially as a result of the corona pandemic, in which the small and simple things were (re)valued, simplicity might be a short-term trend to take into consideration.

Slow travel is on the rise. In this way of travelling, one destination is fully discovered and experienced in a sustainable and experiential way. Trips in slow travel take longer yet are carried out less often a year and therefore mitigate the negative impacts of travelling. Slow travel aims to contribute to local economies. Original Travel offers varying slow travel itineraries, also in combination with walking.

Secluded accommodations, camping in remote areas and extraordinary dining experiences in nature are examples that bring travellers closer to nature. Regarding accommodations, especially travellers in older age categories may opt more for exclusive cottages and villas that provide them with safety.

Whereas in 2019, the majority of travellers preferred to stay in hotels during their travels, travellers now, and in the coming years, might opt more for holiday rentals. Uyaphi African Safaris and Tours offers remote lodges in different African countries. Other trends that may perfectly combine with walking tourism are stargazing and dark sky expeditions, self-sufficient lodges and working on farms.

In the new normal, consumers will be more (price and/or budget) conscious in their booking behaviour. Opportunities are carefully considered and compared and reading reviews will be part of the process. Consumers will take more time looking for inspiration for their holiday. They will consider a variety of destinations and components of a trip and look for promotions, discounts and savings on certain components of a trip.

Travellers will be more sensitive regarding flexibility (for example: accommodations/travel organisations that employ refund policies, flexible cancellation/postponement procedures or offer changing dates for free, restaurants that can be booked last minute, increasing transparency in cancellation policies and insurance possibilities).

Tips:

Try to involve your local community in setting up walking tourism products, to create the best experiences for travellers and to maximise benefits for the community. Consider adding homestay possibilities, having dinner at restaurants, or in the outdoors, where they serve local food, cooking with locals workshops, wellness retreats, learning more about local challenges and more. Make memories together, connect with locals, enable travellers to completely immerse themselves in a different culture, invest in community life and make places a little better. Purposeful Travel is a small tour operator that offers a range of itineraries to developing countries.

Offer night walks to observe the sky and stars in a remote area.

Invest in travellers' pre-travel phase. You should find something that immediately grabs the attention of your potential target group(s) and that makes them decide to book your product.

Zoom in on the sustainable/naturalness aspects of your walking product. Sustainable in the sense of being good for people, planet, profit (for example: investing a part of the money from bookings in nature conservation, focus on walking as a low-carbon-footprint activity). A considerable part of walkers opt for meaning in tours.

Combining a new way of working or schooling (abroad) with walking tourism

It is increasingly accepted to work from home or somewhere else for a while and work remotely. Workcations or nomadic working, a combination of working and travelling, already started before corona, but is expected to rise in the coming years. Remote workers only need a good internet connection and perhaps office facilities. Although businesses' budgets for business travel are scaled down, there is potential in offering a combination of co-working camps, walking activities and retreats for personnel. Coworking Camp from Malaga offers co-working camps.

Combining work and vacation also affects the travellers that travel for business purposes, with the traveller being eager to combine business with leisure time. Here, many organisations updated their 'bleisure' packages and increasingly offer co-working camps and retreats.

A countertrend is a movement towards being offline, that may increase from 2021 onwards. Wi-Fi-free destinations, staying off-the-grid or in tiny houses and retreats are just a few examples of disconnecting. Also, Europeans increasingly opt for a sabbatical for a certain period of time. In sabbaticals, reconnection with self is central, yet also to break with certain routines. Walking is ideal for many to find inner peace, to absorb a totally different environment and to keep things in perspective. Offer walkers sabbatical walks. Original Travel from UK offers a range of itineraries, among which are different kinds of sabbaticals.

Many travellers consider sabbaticals that will last for a longer period of time to reconnect with the world and fully familiarise themselves with the destinations they visit. The corona pandemic and the uncertainty that it brought for schools and the positive experiences in regard to home-schooling has led to a trend in families moving for some time to a foreign destination and planning adventures here, named as 'edventures'.

Families with children are increasingly looking to spend time abroad, even during school time, and make use of remote learning on the spot. In their leisure time, they spend time on adventures. This target group won't be most interested in walking tours, however. In this way, theory will come to life. Responsible Travel offers a range of adventure options for families.

Tips:

Target travellers that are interested in nomadic working. Offer them leisure activities to stretch the legs and unwind by offering (guided) walks in nature, wellness after the walk, cooking local food afterwards and end the day with a local dance performance. This experience will definitely lead to new inspiration and a creative mind for another working day.

Offer families a package in which walking activities are combined with education. You could think of setting up a workshop on ecology, biology, geography for children during a walk through nature.

Offer travellers the possibility to disconnect and gain pure experiences in which good conversations, moments of rest and (re-)connection with nature are central. In this regard, focusing on self-reflection, self-development and meaning is crucial to address walkers.

The demand for staying in remote/off-the-grid areas with basic facilities only is increasing. This is appropriate to a group of walkers. Offer them the possibility to stay on small campsites, in tiny houses, lodges, or log cabins on the route/trail.

Generation Y and Z change the market

With a growing market share of generation Y and Z walking tourists, the focus lies on immersion with places and locals, (re-)connecting with one's inner self and finding peace and consolation. Especially amongst millennials, once-in-a-lifetime experiences are required. Millennials are the largest growth market in hiking.

Technology is becoming increasingly integrated into individual travel experiences and forms a platform for further personalisation of travel experiences. Consumers demand more virtual reality and online presence from destinations. This should improve experiences online, feelings of comfortableness and help travellers in the decision-making process. Suppliers will react by offering more incentives to tempt travellers (for example by using influencers for promotion on social media).

Getting a first glimpse of a destination that travellers wish to visit for the first time through virtual reality may give consumers the final push. A study by Booking.com indicated that 36% of respondents prefer virtual reality before they visit an unknown destination in order to feel at ease.

30% of respondents opt for acquiring virtual experiences at home without visiting a destination. This enables ‘stay-at-homers’ to experience collections from museums and galleries and destinations and tourist attractions online. Examples are going on a virtual safari and at the same time supporting conservation efforts, exploring ancient tombs or entering a simulated past living situation at a specific destination. WildEarth offers a range of (live) safaris for children.

Using technology during travelling is constantly increasing. Technology will be used throughout trips by travellers to regain spontaneity and self-confidence and to ensure safe and responsible travelling, especially in the light of the corona pandemic. This is also called ‘spontechnaity’.

Possibilities to communicate with providers should be easy (for example by one click, swipe). In regard to walking, technology mainly focuses on functionality. Apps, (digital) coaches and workouts and gamification can all increase the level of experiences of walkers that visit your destination.

Generations Y and Z also have a higher preference for visual communication. Messages should become more and more visual, emotional and extreme in order to grab their attention and to distinguish yourself from competitors. On Active Traveller Magazine, you can get an impression of how you can promote your product.

Tips:

- Use social media influencers to promote your product to the public. Working with prominent European travel influencers means that your product is communicated to a wide audience.
- Offer walkers a first virtual glimpse of what kind of walking experience is waiting for them. Would you like to show a part of the route/trail walkers will be walking? Would you emphasise that remarkable piece of paradise in the middle of the woods? Or a thrilling ledge with an abyss that walkers need to cross? Bring your potential visitors in the mood and help them make a decision.
- Consider combining walking with gamification to stimulate intrinsic motivations of walkers and to implement certain thrilling elements on routes and/or trails. In gamification, certain game principles and techniques are applied in real-life situations (for example: geocaching, fitness apps, Ingress, Run An Empire).
- Use photos on your (potential) social media accounts or website that show how extreme, genuine or authentic your product is. Especially when you would like to target younger generations. Older walkers respond better to different kinds of promotion.
- Interact regularly with your target group(s) on social media to build your brand. Especially younger generations spend a lot of their time on social media platforms. Share interesting and noteworthy content regularly as it leads to engagement with your audience and brand awareness.

More demand for certain specialist niches

There is a shift towards more structured excursions, private tours, self-guided experiences and/or tailor-made packages, in which products are individually tailored and experiences can be shared more intimately with family or close friends.

Ecological tours, where the focus lies on educating and informing walkers about the environment and how to safeguard this for future generations, are becoming more important. Revenues from tours are consequently used for funding ecological projects (for example for forest/animal habitat improvement).

Travellers will demand more sustainable options in itineraries and will be more eco-conscious in the decision-making process. According to Abercrombie & Kent, 60% of the surveyed clients in 2020 opt for more responsible travel options. 78% of those said they would base their decision on organisations' environmental credentials and certifications. A study by Booking.com reported that 58% will be opting for making more sustainable choices if travel takes off again.

Booking engines see a shift in keywords used towards more nature-based/rural/outdoor ways of travelling: in a study by Booking.com, it was found that people use words like hiking, clean air and nature quite a lot in search engines. This is more than in pre-corona times.

There is a tendency among travellers that travel organisations should be more transparent about how their money is being used for (re)building communities. Travel choices should directly support destinations. This is attractive to most walkers, as they generally aim to be a positive influence on the destination they visit; this is also called regenerative travel.

Especially younger generations tend to demand adrenaline-boosting activities. Tours and activities that last for multiple days are becoming more popular. They are also booked further in advance.

Farm-to-table experiences and/or regenerative eating combines local food experiences with being in nature. This combination enriches the walking experience for a lot of walkers. Food and farm tourism might be of great added value to walking tourism, as it taps into the characteristics that are associated with walking tourism. Gourmet Trails offers farm-to-table experiences and more for a range of destinations.

(New) skills and hobbies that were started or were picked up again during corona lockdown periods are increasing in popularity in itineraries. People would like to carry out their hobbies while on holiday or improve them. Examples are gardening (for example garden tourism), painting, cooking and outdoor activities. Saga holidays offers several special interest holidays.

Wellness or even extreme wellness has been another trend for years already that may really take off now, given the fact that travellers are now more health-conscious than ever and opt for more challenging and enduring activities. The Global Wellness Institute shows that the wellness industry is estimated to grow to 900 billion dollars in 2022, in comparison to 640 billion dollars in 2017. Wellness connects perfectly with walking tourism.

Offering holistic, personalised wellness programmes that focus on relieving, (digital) detoxing, meditation, yoga, massage therapies, spa, or walking therapy are all options in itineraries. In contrast, extreme wellness focuses on discomfort and endurance, in which extreme challenges are key. Nature and outdoor activities will be a driver in both forms of wellness and play a crucial role in escapism.

Tips:

Combine walking with a range of other activities, such as birdwatching activities, volunteering, wellness, food and cultural highlights. Example: a walk to a scenic location for meditation or yoga and tai chi in an outdoor setting and having lunch at a local farm afterwards.

Offer walkers value for money and something extra compared to what your competitors offer (for example: stargazing at night, sunrise/sunset walks up the mountain, birdwatching, wellness and walking, ‘mumcation’ (for mothers who want to refuel), save-your-marriage trips, ‘painmoons’ (travelling with the aim of recovering from a stressful period or a period of hard work), fertility trips. They will be more willing to book your product if they know that your offer is genuine and authentic and that it pays off. Consider offering extreme/spartan walking products to specific target groups in which endurance and discomfort is central.

Most walkers are eager to become educated about varying aspects in relation to the destination they visit. Offer them an educating walking experience by implementing an array of unique historic, natural/ecological, (socio)cultural, or culinary features. Let walkers become aware of your destination and stimulate regeneration.

Consider offering walkers the possibility to craft their own walk (perhaps including side-activities) in the booking process or directly on the spot. Younger walkers (for example millennials and Gen Z) prefer self-guided trips that offer more flexibility and independence. Older walkers tend to prefer more organised trips, in which most components in the itinerary are already fixed before departure.

Consider working together with organisations that aim to invest a (large) part of the money spent by bookers directly into your destination.

This study was carried out on behalf of CBI by Molgo and ETFI.

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