

Walking the talk: collecting data in situ on walking tourists

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Published in:
Sage Research Methods: Business

DOI:
[10.4135/9781529670509](https://doi.org/10.4135/9781529670509)

Publication date:
2023

Document Version
Author accepted manuscript

[Link to publication in ResearchOnline](#)

Citation for published version (Harvard):
Davies, N 2023, Walking the talk: collecting data in situ on walking tourists. in *Sage Research Methods: Business*. SAGE Publications Ltd. <https://doi.org/10.4135/9781529670509>

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SAGE Research Methods Cases: Business & Management

Case Study Title: *Walking the Talk: Collecting Data in Situ on Walking Tourists*

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Author bio: Dr Nick Davies is a researcher and lecturer in tourism and events management. Currently he is the departmental lead for teaching and learning and programme lead for BA International Tourism and Events Management. His research has focused on sustainable travel in a number of contexts including active leisure, sustainable transport, green infrastructure and tourism behaviour. Nick has produced research funded by the European Union and Commission, ESRC, EPSRC and ERDF; and many other local, regional and national organisations working with diverse partners such as Sustrans, the World Health Organisation, Transport for Greater Manchester and the National Trust. Recently Nick was the technical lead of the Nature Based Solutions Living Lab for the IGNITION project in Greater Manchester, funded by £1.7 million in Urban Innovative Actions funding.

Nick is also a co-founder of the research group, Healthy Active Cities at the University of Salford, and is developing a network with partners across the UK, Decarbonising Leisure Travel. He supervises doctoral students and has a growing number of completions, and his interest in research methods continues to develop in the context of tourism and leisure.

Discipline: Business & Management [D12], Other Management Specialties [SD-BM-14]

Academic Level of intended readership: Intermediate Undergraduate

Published articles based on the research project this case study explores:

- Davies, N. (2021). Understanding the diversity of recreational walking preferences and experiences: casual and serious walkers in the English Lake District. In *Leisure activities in the outdoors: learning, developing and challenging* (pp. 11-23). Wallingford UK: CABI.
- Davies, N. (2018). Who walks, where and why? Practitioners' observations and perspectives on recreational walkers at UK tourist destinations. *Annals of leisure research*, 21(5), 553-574.

Abstract

This case study is useful for students and researchers conducting research on visitors to outdoor tourism locations, rural spaces and places where active leisure are undertaken. It also provides insights into the difficulties on collecting data on mobile respondents in a large area effectively. The case study focuses on research on recreational walkers in a popular tourism location, the English Lake District. The aim of the research was to segment recreational walkers to understand differences in their motivations, characteristics, and route-choices in order to provide insights to practitioners involved in managing and marketing destinations in rural settings.

The case study details the considerations I encountered when planning and designing the research, how to select a data collection strategy to achieve optimal results and importantly, how over the course of a survey, I reflected on my experience in order to modify and adapt my approach. These lessons helped me to obtain a diverse sample required to segment walking tourists, and can provide suggestions to researchers aiming to understand more about visitor choices and behavior.

Learning Outcomes

By the end of this case study, readers should be able to . . .

- Understand sampling considerations in research on mobile tourists or consumers
- Critically assess methods for collecting data on different segments of active leisure consumers
- Appraise communication between researchers and research subjects in an outdoor setting
- Critically analyse strategies for collecting consumer data in outdoor and varied physical settings

Case Study

1. Project Overview and Context

Walking is the most popular recreational activity and is accessible to most of the population as an easy, healthy and relaxing option for spending leisure time. It encompasses everything from short walks in a tourist setting between attractions, to hikes in mountain settings; gentle strolls to all-day or multi-day trail walks; charity walking events to challenge walks; and walking in organised groups, with family and friends, alone or exercising dogs. Certain destinations or settings are often synonymous with all of these types of activity. The management of national parks and other sensitive areas, tourist destinations, tour operators and other key stakeholders have vested interests in understanding more about walkers, their motivations and choices to manage visitors better and market their products. There are also wider societal benefits for understanding what motivates or hinders walking activity and how walkers behave.

How might we find out more about such a diverse range of consumers? For leisure-related activities this complexity can be further complicated due to the fact that on any given day, in any given setting, people will make discretionary choices. However, understanding the subtle differences in motivations, behavior and choices can uncover many insights. For example, how can we encourage more people into the countryside? Who visits our tourist areas and what do they do when they get there? How can we understand visitors more to ensure that the main product – the tourist setting – is looked after and retains its value to potential new tourists? How might we realise health benefits in the population by ensuring walking as an activity is accessible? Do walkers need a certain level of experience or ability to be able to access the walking routes within a destination? What might they need to help them? Which routes do they take? Are there other aspects relating to their lives which are relevant to their recreational choices?

This particular research project was undertaken for my doctoral study on recreational walkers in a popular rural tourist area, the English Lake District. It developed as an area of study due to a number of factors including: the lack of a body of literature on walking and tourism, at least proportionate to the size and scale of participation in the activity; the need to understand the differences in motivations of recreational walkers and the interaction of people with rural tourism environments, and to provide interested practitioners with an understanding of who their target market. On this last point it is important to point out that this research followed on from another primary scoping piece of research in which the aforementioned practitioners were the research subjects. My initial research (Davies, 2018) involved providing a research framework for a survey of walkers which is the main focus of this case study. More details will be given on this process in the next section. The fundamental aim of the research was to explore segmentation of recreational walkers in order to understand different characteristics and motivations, and determine whether these affect route-choice.

Section Summary

Walking is a popular activity in tourist areas which covers an array of different forms and contexts

Researching recreational walkers who visit tourist settings can have a range of benefits including understanding visitor behavior, understanding motivations and being able to manage visitors better.

Researching participants in walking activities requires an appreciation of the diversity of different walking-related activities and differences between the consumers

The case study covers research on recreational walkers in the English Lake District.

2. Research Design

As with any academic research, the initial design of the study was important to its success. Several key questions needed resolving and decisions needed making at the outset. The researcher went through the 'onion process' (Saunders, 2007) of deciding on a philosophy and approach which aligned with a methodology. In this case a pragmatist worldview reflected the need for 'real-world' application of the development of knowledge; the approach was inductive reflecting the need to build theory and the methodology was a 'mixed-methods' approach. This involved a qualitative programme of interviews with expert practitioners who had an interest in recreational walkers, followed by a quantitative survey questionnaire of the recreational walkers themselves.

The first part of the research (Davies, 2018), although not my focus here, is important to briefly mention, as its findings were used as a basis to design the questionnaire. Using two data collection methods to incrementally build understanding is one potential strength of a mixed-methods approach. In this case, as a relatively underrepresented area of study, the use of 23 in-depth interviews helped me formulate a set of questions for the questionnaire in the absence of sufficient theory. These interviews were conducted with practitioners from a range of walking related roles: walking group leaders, health professionals, access managers, walking equipment specialists, national park managers, walking book writers and academics, amongst others. The interview findings provided a theoretical basis to design and ask the most pertinent questions in the survey questionnaire. Some of the main areas of enquiry arising from the interviews were: that there are different motivations for walking, which are related to whether people are serious or casual in their interest in walking; that certain characteristics such as age, gender, ability, level of experience, confidence and navigation (the ability to read maps and other forms of navigation) may affect choices; and that walking behavior and choice of walking route depends upon these characteristics but may also be subject to situational variables such as location, available time, and weather.

The interview findings and conceptual framework arising from them pointed to a need to segment the target group in the survey. Segmentation is a common tool in market research to understand differences in taste and consumer choices. My hypothesis was based on the premise that destination managers in walking locations could understand the behavior of visitors with regards to walking and market routes, provide information and manage locations better using segmentation as a tool and developing a model of route-choice.

The choice of a survey was an important decision to make within itself. Why use a survey? What are the strengths and limitations of this method? These were questions which were necessary to weigh up. The justification was that, in order to understand the breadth of differences of recreational walkers, information was needed about a large cross-section of people. Therefore, to reduce bias and provide a robust sample, it was necessary to survey a large number using mainly quantitative data.

The Lake District was chosen as a study area because it is a popular tourist location, with 15.8 million visitors per year (Lake District National Park, 2022) who embark on a range of activities based on diverse motives. The logic behind the choice was that to capture a varied sample of recreational walkers (in terms of characteristics motivations, preferences and different walking behavior), the Lake District suited. There are a range of hill walks, low-level walks of varying degrees of difficulty and length, and tourists prioritise walking differently compared to other activities (for some it is the

main focus of their visit, for others a subsidiary purpose). The practical reasons for choosing this area was its proximity to University of Central Lancashire where my doctoral study was based. It was the closest suitable tourist area and therefore easy to travel to, whilst still providing the necessary range of tourists to study. The plan going into the research was to target the Lake District with a series of surveys, ensuring that a broad range of locations (busy, quiet, hilly or flat, close or far from urban centres, etc) was covered, and as diverse a sample of people was covered in terms of their walking preferences. This requirement necessitated a number of practical considerations, which are covered in the next section.

Section Summary

- *A mixed methods approach using a qualitative programme of interviews with practitioners and a quantitative survey was employed (this article focuses on the quantitative dimension)*
- *Results from the qualitative research provided parameters for the survey, which sought to segment recreational walkers*
- *A large number of respondents were needed for the sample to provide a basis for segmentation analysis*
- *Sampling and data collection from respondents involved planning to visit an area visited by a wide range of recreational walkers with diverse tastes (long/short, difficult/hard walks), therefore the English Lake District was chosen as a study area*

3. Research Practicalities

Before undertaking research on people, it is necessary to understand, and mitigate for, any ethical considerations. Universities have processes to ensure that any research, including at undergraduate and postgraduate levels, is governed by suitable processes to ensure that ethical concerns are analysed. This may be the collection and use of personal or sensitive information, its storage and whether it can be attributed to individuals. In my research, concerns were of a relatively low level. The survey was anonymous and aside from home postcode, age, gender and job title, no specific information was collected by the survey. Most questions were on walking behavior on the day of the survey, general walking behavior (such as their usual types of walk, distance, preferences), Likert Scale questions on motivations, preferences and characteristics (such as level of experience, whether respondents live in a walking area, and how important walking was to them), and therefore used to gain an idea of trends and patterns across the sample population. Another key consideration was the health and safety of the researcher. A risk assessment form was completed to ensure any potential risks were identified. These included walking alone, walking in remote areas and at height. As I was a reasonably experienced walker, used to relatively difficult walking situations I was able to assess mitigation strategies such as in the scenario that the weather changed, to be able to shorten the walk with a predetermined route back to civilization, and to ensure I had a means of communication with me at all times.

A further consideration related to constraints and resources, and I was provided a finite budget for travel by my department. I assessed how many times I would need to travel to the Lake District in order to acquire a data sample sufficient to meet the research objectives. This involved two survey days each calendar month from January to December, one weekday and one weekend day, resulting in 24 survey days overall (to cover all seasons and quiet or busy times). The distribution of those 24 survey days covered a mix of busy/quiet sites, availability of different walks and a range of well-

managed/wilderness sites, some close to amenities and others much more difficult to access (up to a 2.5 hour journey), which involved more planning in advance. The study sites were based on ensuring each part of the Lake District, geographically was covered. There are different mixes of people visiting each area based on motivations and their desired walking experience and it was important to capture all of these. Using a map, the suggested sites were chosen to ensure coverage, but this was open to adaptation (this will be explained more in the next section).

A fundamental consideration was the choice of exactly where I would find and access the walkers I needed to survey in order to meet the research aims. This involves more thought than choosing areas on a map. The initial plan was to travel to car-parks which were used for accessing walks and employ an 'intercept survey'. Public transport stops nearby were also considered. The strength of this was catching people at the start or end of a walk, and anyone else passing through. However, there would be a flurry of activity in the morning and late afternoon (full day walks) or at lunchtime (part day walks ending or beginning), and this sometimes meant missing people or periods of time where it was quiet. An intercept survey allows access to respondents at a certain site and is sensible to ensure the best coverage of those passing through a location. In practice it involved my greeting people with a paper questionnaire and a reply-paid envelope and asking them to fill it out after their walk (as there were some questions about the nature of their walk on the day such as length, locations, purpose of walk and route choice).

It is important to explain why an intercept survey was more appropriate than other methods. The available time and resources were weighed up against maximizing the number of returned questionnaires. If I had asked people to stop and fill out the survey I would have increased likelihood of surveys being filled out, but compromised the chances of covering everyone I saw. By giving them the survey questionnaire to fill out and return later I was taking the risk that they might not do so, and relying on them to post it back once finished. Clearly they would not all do this. This leads me on to another consideration: how important it is to make a good impression by being polite and personable in my interactions. Having a memorised speech (a short one) was crucial in order to make sure that respondents were bought in, and it often involved me explaining a bit about what the research was intended to achieve. It also is important ethically for research subjects to be informed on the nature and aims of the research before participating. At the start of the questionnaire a short summary of this was provided as well as a confidentiality statement, and details of how the data would be anonymised, stored and managed.

Section Summary

- *Ethical considerations regarding the collection of people's personal information were analysed, and mitigated for, prior to undertaking the survey*
- *Conducting research in the outdoors requires risk analysis to mitigate any potential issues such as health and safety*
- *Ensuring a diverse sample which was suitable for segmentation analysis was important, and therefore I planned to cover a range of different study sites*
- *Intercept surveys using reply-paid envelopes and paper questionnaires were used as a means of maximising the number of responses*

4. Method in Action

The first of the 24 surveys took place in early January, in a car park at the bottom of the mountain, Coniston Old Man, which was a starting point for a number of walks. This one acted as a pilot for the survey, in order to ensure I was being effective in my strategy. Pilots are a good means of trialing research and if necessary changing things. In my case there was one question that a number of people misunderstood, which I ended up changing. The use of a car park seemed to work in this case as it was relatively small and could be reached by a single access road. People arrived and I was able to talk to them as they put walking boots on and packed their bags. Another survey in January was undertaken in the village of Grasmere, a popular centre for tourists and starting point for numerous hill walks and low-level walks. By using this location data was collected on an area far wider in terms of where people walked, but they had to have parked in the car-park or at least passed through on foot. Over time I began to wonder: if I was limiting myself by staying in one place all day, especially as, after the initial flurry of people at the start of the day there were long quiet periods where I did not see anyone.

Over time I began to develop other strategies of collecting data. Sensing that I was missing people parking in other places, or perhaps using public transport, or even those people on multi-day walks passing close to my study sites (there are a number of people on long-distance trails who may not be using car or public transport), I began to leave my station to try and find more people, and increase my responses. At first, being completely honest, I was bored. I would begin to walk around more to break up the day, with the added bonus of finding more respondents. Eventually, I adapted my approach completely. I would still find a car-park or location to start and end the day in, by estimating when the busiest times would be, in terms of people arriving and leaving. However, I would also plan a walk using the footpaths which intersected at the chosen car-park/study site. This effectively expanded my dataset, by including walkers who were using the footpath network from start or end-points elsewhere. When writing up and defending my thesis I ensured that I justified my change of approach for reasons of practicality and efficiency, in addition to providing a richer dataset for segmentation purposes.

Going into car-parks and other study sites to conduct a survey requires permission prior to the survey day. I had discussed this with one of the interviewees, a recreation manager from the national park authority, who had provided me with contacts from the organisations who manage the sites, including local water boards, the national trust and the forestry commission. This was also effective in getting advance information on when sites would be busy. For example, one contact I made advised me that on the weekend nearest to the summer solstice (the longest day of the year), many challenge walkers compete annually in the 3-peaks challenge, an organised event involving climbing the highest mountains in England, Scotland and Wales within 24 hours. Scafell Pike, the middle of these, is the highest peak in England and situated in the national park, and competitors usually climb it overnight. On that day I reached the site at 4am, to capture an important subset of walkers (challenge event walkers) who had previously been underrepresented in my dataset. One of the strengths of running a survey over a full year, was that I was able to develop my own understanding over time of who to access and how.

I must also discuss the point of interaction when stopping somebody who is on a walk, enjoying the countryside, and perhaps trying to make the most of their holiday. Put simply, it can be annoying if you are out walking, trying to get away from everyday stress, and a stranger stops and asks you to help them with their research. Thankfully, I was in the lucky position that my survey involved a mainly relaxed subset of people and most of the time they were receptive, and even interested in the study itself. If I got into a conversation about what I was doing, I became fairly sure that I had made enough of a positive impression to ensure they would fill out and return the survey. As walkers

are often invested in their surroundings, it was advantageous to explain that the results would be useful for the ongoing management of the location. The location also helped as people are generally more friendly in open spaces. Compare it to conducting a survey in a busy street – I would suggest many more people would ignore or avoid you. Therefore, I learnt a lot about how to read people before approaching them. In a few cases, it was obvious straight away that they did not want to be disturbed and the best approach would be to apologise and move onto the next person, rather than force the issue and try to continue to persuade people. This is another advantage of having a year to learn about interactions and adapt accordingly.

Adaptation also covers weather, which in my study area (the wettest part of England) was always going to be an issue. In February, I planned a survey in Thirlmere, arrived there and was met by torrential rain. Nobody was out walking and consequently I went home early. Similar issues happened in September in which the region suffered unusually heavy rain. These set-backs have to be acknowledged as part of the survey process. Additionally, I arrived at one site (Aira Force) in April and realised I had picked up a pile of the wrong paper questionnaires! Having printed off a few hundred for the pilot, I had left some in my office and never disposed of them after adapting a new version based on the learning points of the first survey day. The response to this was to abandon the survey that day and insert another one later in the month to make up for it. Overall, I would say that all of these problems, set-backs and adaptations are an important part of the research process.

Section Summary

- *The survey followed a planned format at first, using car-parks and busy sites to intercept walkers. Over time the approach was adapted to include walks as part of the intercept survey.*
- *Initial planning is important for a survey strategy in the outdoors, but monitoring and adapting to setbacks can be useful to improve coverage of the research subjects.*
- *By conducting my survey over a calendar year, I was able to build knowledge by networking and gaining awareness of dates and events in which I would come into contact with large numbers of walkers*
- *The interaction between researcher and the respondents is an important point at which, as a researcher, I learnt to read the situation and whether respondents were amenable to participating in the survey. This took time....*

5. Practical Lessons Learned

The experience of planning and conducting my survey taught me a lot about being a researcher in the outdoors. I will now briefly discuss several learning points which I believe are useful for anyone planning something similar in the future.

Firstly, my overriding feeling after a year's worth of conducting surveys in the national park, is that researchers should consider and regularly evaluate their approach to data collection. Having a well-thought out plan in the first place is important, but it may not be possible to anticipate all potential issues, and therefore being adaptive is key. It is also important to be able to justify any changes made when writing up and presenting findings. Adaptive sampling is an approach which Thompson and Collins (2002) describe as comprising any sampling design which is altered from observations made during a study, which can be used for elusive populations.

This adaptive approach also relates to my second learning point. By being receptive to potential changes, opportunities may arise to improve the quality and depth of your data set. My experiences of talking to walkers and practitioners during the survey year uncovered information on potential sites to access a more diverse set of respondents. The best example was the challenge walkers I encountered at Scafell Pike. Their involvement in the research meant that my sample contained data on people at the more extreme end of walking in addition to the many others which I had met elsewhere. Subsequently, this would improve the rigour of the segmentation analysis. A key finding of the research was that there is a continuum of 'levels of seriousness' about walking and that individuals and walks (in terms of the difficulty of routes) can be matched to different points on the continuum. This relates to Stebbins' (1982) theory of serious leisure which he developed to take into account types of leisure which participants treat as a career, to continually improve skills and progress.

A third learning point was that interaction with potential research subjects in an outdoor tourist setting requires an appreciation of context. Maximising responses for the segmentation exercise was my overall goal, but there will always be some limitation in terms of this data collection method. This limitation is nuanced towards context. It might be that your intended respondents are more interested in enjoying a walk, or trying to get from A to B, than speaking to a stranger conducting research. It could depend on the individual, their mood on the day, the weather, who they are walking with, whether they are in the middle of a conversation, or any other context-specific reason (which you might not be aware of). Tourism or any consumer behaviour is nuanced and decisions are made based on a combination of conscious and unconscious processes (Martin and Woodside, 2012). A researcher has to take this on board and do the best they can in the circumstances. Certainly, weather was a big factor at times for me and having contingencies in place such as being prepared to bring the whole survey day to a close if necessary and try again another day were necessary.

Finally, the reason why I am able to tell you all of this is that alongside my survey, I was also keeping a reflective diary in which all of my thoughts on the process, the sites, the people I met, the weather, the situations I found myself in, the changes in approach I made and why were recorded. I cannot state enough how much this helped me in my analysis and importantly when defending my work during my viva-voce and documenting limitations in my thesis. In fact, one of the recommendations by my examiners was to include this diary of observations in the form of a spreadsheet, in the appendices of my thesis. Indeed, field notes are a vital part of ethnographic studies due to their recording of changes in the thoughts of researchers (Elliot and Jankel-Elliot, 2003). A year is a long time to hold information in your head, and then recall it whilst writing about limitations.

Section Summary

- *An open mind and an ability to adapt were beneficial to me when conducting the research. Adapting my approach helped me to gain more coverage of different walkers for my segmentation analysis.*
- *Opportunities to access different groups of walkers arose over the twelve-month period. Networking and drawing information from walkers and practitioners can enhance data collection effectiveness.*
- *Not everyone in a walking tourism setting wants to stop and engage with a researcher. Judging situations is an important skill to develop in order to improve researcher-respondent interactions.*

- *Keeping a reflective diary can aid researchers when they come to justifying their approach to data collection.*

6. Conclusion

Ultimately, this study raises a number of issues with conducting research in-person, in situ, with the public. In particular, it provides an idea of the considerations underpinning the design and execution of data collection on tourists and recreationists in outdoor settings. From my study, the overall lesson learned was to be open-minded, reflective and able to adapt to issues faced during survey days. The success of my survey can be found in the 523 returned questionnaires I received, which provided a basis for a segmentation exercise (details can be found in Davies, 2021). They provided a broad range of data on the motivations, interests, characteristics, behavior and choices of walkers of all abilities, and walking on a diverse set of routes.

I suggest, for researchers looking to understand visitors to a set region or location, that my approach and methods can be replicated, but I caution that researchers should also assess the nature of the location and its visitors first. Alongside this, drawing insights from practitioners to design data collection strategies can be useful, and continual review of the process will allow researchers to obtain data on visitors. I also recommend that being in a location to collect data provides the researcher with an idea of where to find research participants and the best methods of intercepting them to collect data. Finally, being reflective, and documenting the process will ensure that decisions made during the course of a survey are well considered, and that limitations and strengths of the research can be identified later and appraised.

Discussion Questions

1. What are the key considerations of researchers when planning research in outdoor leisure spaces?
2. How does in-person research differ from online research in terms of capturing data on visitors to a tourism destination?
3. How important is obtaining a diverse sample when seeking to understand all of the visitors to a tourism destination?
4. Considering research on a subject you are interested in, what suggestions would you make to someone looking to understand more about tourists?
5. Why is it difficult to understand behaviour of people in a spatial area?

Multiple Choice Quiz Questions

1. What type of survey is most suitable for collecting data on visitors to an outdoor tourist area?

- a. Door to door survey
 - b. Telephone survey
 - c. Intercept survey -CORRECT
2. Of the three approaches below, what would be the most effective means of ensuring data can be collected on a diverse range of walkers in a tourist area?
 - a. Intercept walkers in a car park at the start and end of their walk
 - b. Intercept walkers by walking a number of routes over a day
 - c. Intercept walkers in a car park at the start of their walk, then walk during the day on a number of nearby routes, continuing to intercept walkers, then return to the car park to catch walkers at the end of their walk -CORRECT
3. When intercepting members of the public who were not willing to be surveyed, what is the most appropriate course of action for a researcher in the field?
 - a. Continue to try to persuade them
 - b. Apologise and move onto the next person -CORRECT
 - c. Change location to find other people
4. What is a common approach used by researchers to test the effectiveness of a survey questionnaire?
 - a. Carrying out a pilot survey-CORRECT
 - b. Using mocked up data to simulate the questionnaire
 - c. Analysed other previous questionnaires
5. What is the most effective way researchers in tourist areas can keep records, develop and improve their approach and recall the process in order to later justify their methods
 - a. Discuss approach with other researchers
 - b. Keeping a reflective diary- CORRECT
 - c. Asking the respondents

Further Reading

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Web Resources

Adventure Tourism Research Association available @ <https://atra.global/>

Journal of Outdoor Recreation and Tourism available @

<https://www.sciencedirect.com/journal/journal-of-outdoor-recreation-and-tourism>

Walk 21 'The International Walking Data Standard' available @ http://jimw6.sg-host.com/wp-content/uploads/2020/01/1-internat_walking_data_standard_summary.pdf

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