

BRECON BEACONS NATIONAL PARK

WALKING TOURISM STRATEGY – EXECUTIVE SUMMARY

1. Introduction

This strategy seeks to establish a way of developing walking as a means of achieving sustainable rural development in Brecon Beacons National Park. It looks at the ways of integrating walking much more deeply into the three pillars of economy, environment and community.

2. Walking Resource

With an estimated 3848km of publicly accessible paths and tracks and 800km² of open access, the Brecon Beacons National Park provides an opportunity for access greater than almost anywhere else in England and Wales. Whilst this high level of provision presents significant challenges of management and needs to be responsibly used, it also has the potential to enable the Park to develop to be one of the major walking destinations of the UK.

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Public path networks serve many functions, including the provision of amenity access (routes to school, shops etc), and the promotion of healthy lifestyles through opportunities for outdoor exercise, as well as providing the foundations of a walking tourism economy. However there is no doubt that the public path network is quite simply the largest visitor attraction in the Park and is the foundation of the area's tourism income.

Five main factors have a bearing on the growth and development of walking opportunities within the Brecon Beacons National Park:

- **The state of the access network.** The rights of way network in the Brecon Beacons has been shown to be one of the best maintained in Wales but in terms of our competition, England is 3 times better than Wales. In economic terms, walking is worth £550M to Wales. This argues for significant investment in the infrastructure with an upgrade to adequate standard estimated at £26M, and annual maintenance £8M. In local terms it is important that the maintenance work continues and is focused on agreed priorities.
- **Control and repair of erosion damage** Upland access is often not related to rights of way but erosion control remains of significant importance.
- **Damage to and disturbance of wildlife.** It is widely recognised that walking has a relatively low direct environmental impact. Wet and peaty communities would appear to be most at risk and ground nesting birds can be a particular issue at certain locations. Habitat and species data has been collated and an analysis of the coincidence of public paths with the more sensitive of these has been undertaken. In these areas further specialist advice will need to be sought before projects that may increase pressure are implemented.
- **Safety issues** Whilst Mountain Rescue teams are an essential resource, safety is dependant largely on the state of the access resource and the information available to visitors.
- **Parking and traffic congestion** It is quite possible to plan a walk in the Brecon Beacons using public transport. An analysis of frequency of bus access shows that even with the current bus network, it is possible to gain access on foot to virtually of the National Park.

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3. Finding Out About Walking

A great deal of literature exists on walking but is not coordinated or particularly well targeted.

4. Tourism in the National Park

Much work has been done to develop tourism in this area in recent years and this needs to be built upon using walking as a key driver.

5. Walking Markets

Whilst the walking resource is varied and extensive, it is especially rich for independently minded, confident walkers. However, many potential visitors to the Park are not that confident, and for them the richness of the resource is conditional upon the quality of the access infrastructure and the information provided about opportunities to use it.

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One of the key strengths of the Brecon Beacons lies in walking that offers moderate challenge and good reward for effort. This is a difficult product to offer as it does not speak to the need for superlatives in marketing but it does constitute something many people are looking for. Developing a language to express this represents one of the important challenges of this strategy.

6. Segmenting the Market

The potentially valuable markets for this area based on an analysis of value, volume and ease of addressing the market have been determined to be:

Primary Markets	Secondary Markets
Independent, centre-based, walking holiday and break takers	Packaged walking holidays takers
Primary holiday walkers	Group walking (break takers and day visitors)
Incidental holiday walkers	Primary walking day visitors
Independent hillwalking break takers	

Independent centre-based walking holidays and break-takers

- Predominantly couples of all ages, ABC1, focused on M4 corridor/S England
- Easy country walks of varying lengths, but most commonly around 5-7miles, 7-11km. Keener walkers are interested in walking longer distances and in hill walking. Families are more likely to walk shorter distances. Younger, pre-family elements likely to be particularly attracted to a moderate challenge product.

Primary Holiday Walkers

- Walking plays a part in the holiday destination choice. Two distinct types– couples and family (much smaller) - both are ABC1
- Couples are looking for easy country walks of around 4-6 miles, 6-9km, across fairly gentle terrain. Keener walkers will walk longer distances but are not interested in hill walking. A key communication task in reaching this group is to avoid associations with serious walking. As well as opportunities for walks, they are looking for opportunities for more passive activities such as pottering around towns, eating and drinking

- Family Holiday Walkers are looking primarily for short easy walks of up to 4miles, 6km, with things for children of all ages to see and do along the way. Walks linked to water are particularly popular.

Incidental Holiday Walkers

- Holiday visitors who will go for short walks during a holiday, but as an incidental or secondary holiday activity. The activity is not a factor in determining holiday choice. The segment covers all ages, socio-economic groups and life-stage groups.
- They may only walk while on holiday and most are not well equipped for walking. These people are interested in short walks of no more than 2-3 miles, 3-5km along clearly defined and waymarked paths. They like walking along or to specific landscape features. The key approach will be to offer easily accessible, appropriate, rewarding and reliable walking experiences and encouraging their take up.

Independent Hill Walking Break Takers

- Primarily small groups of friends aged 16-34, both mixed and male-only groups.
- This segment is looking for all-action walking experiences in wild and challenging terrain. They look for circular hill walking routes of 8-15miles, 12-20km as well as National Trails or long distance walks. There is a good fit, particularly at the softer and aspirational end of this market.

Day walking visitors

- Day visitors account for a significant proportion of the Park's total visitors, and of these many come to walk. The focus of this strategy must be on adding value to existing visits within this segment. To achieve spend, it will be important to plan walks that allow time for eating and drinking and to attempt to convert them into future staying visitors. This can only be done by improving the quality of the food, drink, culture and accommodation offer to give a 'reason to stay'. Developing specific products to tempt this segment to stay longer – eg Weekend Walks packages – may also prove valuable.

7. Towards a Strategy

Aims

The **aims** of the walking tourism strategy are:

- To develop and manage opportunities for visitors to enjoy walking in and around the Brecon Beacons National Park in ways that will bring new economic and social benefit to the area, while minimising adverse environmental and community impact.
- To raise the profile of the Brecon Beacons as a walking destination of first choice, based on a quality of walking in an upland setting found nowhere else in southern Britain.

Objectives

In order to achieve these aims, nine objectives have been identified.

- To develop a high quality and environmentally robust walking infrastructure that is appropriate to the identified target markets
- To provide an excellent walking and tourism experience that will encourage repeat visits and recommendations
- To encourage those visitors already committed to the Park to consider extending their visits and to spend more in association with their walking activity

- To encourage those visitors already committed to the Park to consider new visits, especially in the off-peak season and where possible mid-week.
- To encourage new visitors to consider the Brecon Beacons as a walking destination that can sustain a staying visit at any time of year
- To make use of all available information opportunities to promote the enjoyment of walking in the National Park
- To make use of all available information and interpretation opportunities to promote an understanding of and respect for the special qualities of the National Park
- To encourage visitors to keep car miles to a minimum
- To monitor the impact of walking tourism on the economy, communities and the environment

8. Product Development Priorities

The following product development priorities are suggested:

- A portfolio of simple, 2-3 mile walks, providing simple rewarding experiences for existing holidaymakers, wherever possible meeting common standards (least restrictive access, car parking, toilets, good signing).
- A selection of easy walking experiences (4-6 miles) that are well integrated with selected places to eat and drink.
- A portfolio of easy walking experiences (5-7 miles) offering rewarding experiences easily accessible to serviced accommodation, focused on the east and north-east of the Park.
- A portfolio of more challenging walking experiences (7+ miles). These should be easily accessible from a range of accommodation likely to include some walks in the central and western areas of the Park
- Well researched route information for longer hillwalking routes (8-12 miles), developed in association with, and promoted through, group accommodation, including larger self-catering properties.
- A programme of guided walks that focuses on 'moderate' walks and includes mid-week walks
- A long distance recreational route, or routes.

9. PRIORITIES FOR ACTION

9.1 Develop a high quality walking infrastructure

The access resource

The competitiveness of the Brecon Beacons as a walking tourism destination depends on visitors being offered walking experiences that they can use with absolute confidence.

- The National Park Authority & partners should assure a minimum standard of path condition across the entire access network, and the Rights of Way Improvement Plan will consider these issues in a wider context.
- Additional investment is required in the preparation and maintenance of those parts of the access network selected as priorities for tourism product development.
- Via the RoWIP create an Priority Path network defined in part by their value to tourism
- Increase number of LAF members with tourism backgrounds.

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Environmental considerations

Walking tourism should be planned so as not to exacerbate existing visitor management problems.

- Criteria that seek to avoid the introduction of new problems should be set as ambitions for new product.
- Develop a code of good practice similar to that of the National Trust.
- These criteria can be shared and discussed with commercial publishers and journalists with the possibility of awarding a National Park 'kitemark' to indicate those routes that meet the criteria.
- Encouraging the development and promotion of walking routes based on individual accommodation enterprises will help to disperse visitor pressure.
- The NPA should consider the forward management implications of maintaining to a high standard any new product that it introduces and endorses.

Disability considerations

- The Rights Of Way Improvement Plan should take account of the needs of disabled people
- As the access resource grows, consideration should be given to increasing the profile of easier access within the area to disabled people.
- Paths improved for easier access by the NPA should clearly be given maintenance priority

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9.2 Provide an excellent walking experience

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- Any walk that is endorsed by the BBNPA should be well maintained, problem free, well signed and waymarked.
- Develop accommodation and other tourism businesses that are 'best of its kind' and 'excellent value for money'.
- Distinctiveness can be added to the general experience of holidaying in the Brecon Beacons through short walks linked with local food. The availability of good food in the early evening may encourage walkers to eat or stay rather than head for home.
- New enterprises should be recruited to the Walkers Welcome scheme.
- Development of a grant scheme dedicated to improving tourism business facilities for walkers
- A selection of walking opportunities should be made available that meet the needs of core visitor markets to the Park, including less committed walkers.
- The basic need to provide for a portfolio of simple, 2-3 mile walks can be met through developing the existing 'Waterside Places' type leaflet series .
- Wherever possible, common standards (least restrictive access, car parking, toilets, good signing) should be introduced
- Incidental holiday walkers should be targeted by wide distribution of the relevant leaflets throughout the Park, including through all accommodation sectors
- The formation of a Walking Tourism Group (WTG) should be encouraged, bringing together a network of identified tourism enterprises. The aims of the group could include:
 - Offer a training programme,
 - Encourage operators to take part in Walkers' Welcome.
 - Encourage operators to offer special walking opportunities to their visitors.
 - Offer support to enterprises in the development of new routes
 - Develop a standardized format for the presentation of walks information

- o Forming a partnership with a private sector partner, to pre-arrange for some of their clients to be recruited, with appropriate incentives, to trial and report on proposed new NPA walking routes before they are finalised and published. This would give not only give feedback on individual routes, but also presents a wider market research opportunity.
- o Work with local communities to develop individual settlements as 'walking hubs'

9.3 Encourage walking visitors to extend visits and to spend more

- A whole day, whole week culture should be presented in all press and media work, rounding off an active day of walking with relaxing hospitality
- Information about walking opportunities should suggest connections to, or progression from, a walk that has already been enjoyed:
- make connections in walks information between the National Park landscape and local produce
- Walking routes should routinely identify associated places to eat and drink, either on the route or near the start/finish.
- Use car parks to provide information about places in the locality to eat and drink, on screen information would be ideal if practical.
- There is a need for a collection of walking experiences that are well integrated with selected places to eat and drink.
- Encourage visitors to consider off-peak mid-week visits,
- Visitors should be presented with information about opportunities to return on another occasion to enjoy walking in other parts of the National Park, or at other times of year.
- A particular target is to get day visitors to consider an overnight stay on future occasions.
- Develop packages such as Weekend Walks with private sector
- Integrate walking with quality culture, food/drink and accommodation offers.

9.4 Encourage new walking visitors

- Establish a USP for the area based on a quality of upland walking that is not found elsewhere in southern Britain
- Promote a consistent walking message for the area to be used by all partners
- Support Wales Tourist Board 'Walking Wales' campaign and those of other partners with the development of appropriate product for the more recreational, short distance walker.
- Promote a joint campaign aimed at encouraging off-season or mid-week stays, using 'Country Walking' magazine as a promotional vehicle.
- Organise a special Country Walking supplement or feature on the area
- Focus on weekend/longer stays with insert in magazines distributed in the SE and M4 corridor.
- Wales Tourist Board support should be sought for extending the Walking Wales campaign to promote moderately challenging walking in the Brecon Beacons.
- Re-package the Beacons Way in partnership with BBPS as the prime regional walking route. It needs to be adapted to meet tourism criteria and this process should include accommodation operators via the WTG.

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9.5 Promote the enjoyment of walking in the National Park

- Current walking information should be audited against the needs of key markets, in order to plan future provision
- Produce fulfilment print summarising the range of walking opportunities in the Brecon Beacons, and how to obtain further information.
- Route information should offer a clear description of the walking choices available. The approach adopted by Country Walking magazine is seen as a good standard
- Develop an industry-leading walking website, making use of interactive mapping and providing walking suggestions as downloads and linking to tourism information
- Walking information provided by Information Centres (whoever manages them) should be integrated so that visitors can get an equivalent service no matter where they go for that information. This will involve training and regular briefings for information centre staff
- The NPA should develop a consistent approach to the display and promotion of walking across NPICs and TICs.
- Develop use of touchscreens giving tourism information in countryside areas where appropriate.
- Establish simple communication system to support tourism enterprises in distributing selected and appropriate walking information to their guests
- Develop commercial partners to format BBNPA walk information to meet market interest in GPS/PDAs
- Develop walking events based around the use of this technology.

9.6 Promote understanding of the National Park's special qualities

- Develop an information campaign to recruit support for well managed walking within the National Park, influencing visitors to limit their environmental impact. This could be most efficiently organised in partnership with other NPAs
- A Code of Conduct for upland walking should be developed,
- Any partnership with a commercial publisher should require that these messages are incorporated
- Incorporate walking and walking tourism messages into the overall interpretation strategy of the National Park Authority
- Review the Guided Walks programme in the light of the priority market segments identified in this strategy.
- Interpretation at key access points should be increased
- Walks information enables visitors to learn about the special features of the Park, through a set of themed walks for instance on wildlife.

9.7 Keep car miles to a minimum

- Encourage visitors to keep car miles to a minimum by including an overnight stay as part of their visit and suggesting walks from or near their accommodation.
- In partnership with local communities, develop a series of 'walking towns' or 'walking villages'. Support should be focused on selected communities that are prepared to meet tourism and management criteria.
- Prepare a community-based walking tourism toolkit to support such communities.
- Encourage tourism enterprises to plan walking routes for their visitors that are based on their premises. The toolkit above should be written with businesses as well as communities in mind.

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- Promote the use of public transport that meets the needs of walkers. Access by public transport should be considered as a criterion for all NPA walks
- Maintain and develop existing NPA commitment to recreational public transport (eg Beacons Bus)
- Public transport services should be reviewed for their ability to link developing walking opportunities with tourism facilities and businesses
- Promote public transport as part of the whole experience of a walking visit, including suggesting ways in which linear routes can be supported and where height gain can be offered.
- In season, 'walking special' minibuses operating on demand could serve popular accommodation corridors and access points
- Offer 'Walkers Welcome' training and recognition to public transport operators, and to taxi drivers
- Accommodation operators should be encouraged to promote such services.
- Accommodation operators who develop their own routes for guests should be encouraged to incorporate public transport into walking routes
- Work with Arriva Trains to develop and promote train based walks from Abergavenny and Llandovery/Llandeilo.

9.8 Monitor the impact of walking tourism

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- Establish a strategy delivery team comprising representatives from the key delivery partners and tourism businesses.
- A key role of this group will be to monitor and evaluate outputs and outcomes
- The strategy itself will need to be developed and updated. This should be done on an annual basis, with a major revision at perhaps 5 year intervals.
- Monitoring priorities include:
 - Collating baseline information on path condition at key locations on vulnerable routes, and introduce a regular monitoring programme.
 - Monitoring usage through counters placed strategically and analysed to a consistent and comparable standard, co-ordinating all stages of activity between key land managers.
 - Monitoring agreed environmental indicators for impact on key routes.
 - Recruiting accommodation enterprises and their visitors to monitor walking routes, establishing a clear point of contact to report problems and hazards
 - Establishing regular communication with tourism enterprises & local communities that records levels of performance, take-up and satisfaction and identifies problems