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1 INTRODUCTION

1.1 Introduction to the Brecon Beacons National Park

The Brecon Beacons National Park contains some of the most spectacular and distinctive upland formations in southern Britain. Situated amongst hills and mountains, the Park covers an area of 1,347 sq km. (520 sq.m.)

Stretching from Hay on Wye in the east to Llandeilo in the west, the Brecon Beacons National Park is made up of four distinct upland areas: the Brecon Beacons, the Black Mountains, Fforest Fawr and the Black Mountain. The Brecon Beacons themselves are the highest range of the group, rising to 886m (2907 ft.)

The Brecon Beacons National Park is a living and working landscape. Farming is a major influence on the landscape, with rough grazing on the open hills and commons and a patchwork of lowland fields dotted with farms, villages and small market towns.

The diverse landscape of the BBNP provides habitats for many wild species, including buzzards, ravens, red kite, and plants like purple saxifrage. Significant parts of the Park have been designated as protected areas. These are shown in Map Ref 1.1 (see Appendix)

For the purposes of this work, the area of consideration extends beyond the boundary of the Brecon Beacons National Park to include areas surrounding the Park. BBNPA refer to this as the Brecon Beacons National Park Area, defined by a set of postcode areas.

As a National Park, BBNPA has two main, and equally important, purposes:

- to conserve and enhance the natural beauty, wildlife and cultural heritage of the area
- to promote the opportunities for understanding and enjoyment of the special qualities of the area by the public.

Only in the rare event of irreconcilable conflict may the conservation objective prevail over that of understanding and enjoyment.

A third, additional, duty is to foster the economic and social well-being of local communities within the National Park.

A recent review of the National Parks in Wales¹ made recommendations that may, if implemented, alter the approach of the NPAs to this third purpose, and so to tourism.

The special qualities of the Brecon Beacons National Park are recognised as the landscape and natural beauty; peace and tranquillity; opportunities for walking and access to open country; open spaces and qualities of remoteness; traditionally managed farmland; and wildlife.

It is part of the National Park Authority's vision that quiet public enjoyment of the Park should be encouraged, and that opportunities for people to enjoy the Park should be

¹ Review of the National Park Authorities in Wales, prepared for The Welsh Assembly Government 2004

extended. The Brecon Beacons National Park Management Plan² sets out the challenge to enable as many people as possible to enjoy these special qualities, through pursuing their chosen activity with minimal regulation and in a sustainable way. Rambling and hill walking are listed as recreational activities that are likely to be appropriate within the National Park, subject to their proper management.

1.2 What is walking tourism?

In 2002, the Wales Tourist Board published Best Foot Forward³, their strategy for walking tourism in Wales. There is no universally accepted definition of Walking Tourism. However, for the purposes of this strategy we propose to adopt the definition used in the Wales Walking Tourism Strategy, which defines Walking Tourism as:

“Holiday and day visits where recreational walking is a significant part of the visit”

The strategy identifies three main types of visit that fall within this definition:

- Walking holidays – holidays and short breaks where walking is the main purpose of the holiday.
- Holiday walking – where walking is an important part of a holiday (although not the main purpose) and where good walking country is an important factor in holiday destination choice.
- Walking day visits – day visits where walking is the main purpose of the visit.

There are a number of estimates of the value of walking tourism in Wales. The most widely quoted are figures derived from UKTS⁴ that put the value of the market at £550m.

74% of UK holiday trips to Wales involve walking as a main or important part of the holiday, and walking is the main purpose of 5% of UK holiday trips to Wales.⁵

² Brecon Beacons National Park Management Plan 2000-2005

³ Best Foot Forward – A Walking Tourism Strategy for Wales, Wales Tourist Board, May 2002.

⁴ ibid

⁵ The UK Tourist Statistics 2001

2 THE NATURE OF WALKING IN THE BRECON BEACONS NATIONAL PARK

With an estimated 3,848km 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.

2.1 The linear access resource

Surprisingly perhaps, the total length of publicly accessible paths in the Park is not known. Whilst public rights of way as recorded on the definitive map form a core of the whole path network, there are many other types of publicly accessible paths recorded in differing detail in different ways. Given that it is the total access resource that is relevant to this walking strategy, some consideration is given to these other paths in this section.

As part of the process of understanding the extent and nature of the access resource, information about all types of linear access was collated from a variety of sources. This data was processed into a geographic information system (GIS) and subsequently mapped and analysed. This detailed, GIS-based information is an important and valuable output of this strategy development project, but the scope and detail of the information far exceeds that that can be presented in a written report. The Park Authority holds this background information in their GIS.

The total publicly accessible path network comprises:

Public rights of way recorded on the definitive map

The National Park Authority manages the Definitive Map on behalf of the Park's constituent Highway Authorities. The Map records the existence of 1,983km of public rights of way with 70% of these having the status of 'footpath' and the remaining 30% providing rights of access for cyclists and horse riders. All status of paths recorded on the definitive map may be legitimately used by walkers, walkers pushing bicycles and walkers with (well controlled) dogs.

The distribution and density of these recorded paths, shown in Map Ref 2.1a, varies significantly across the Park. In the upland areas relatively few recorded paths exist as, presumably, the long-standing tradition of free access in these areas meant that no such routes needed to be recorded. The most comprehensive networks exist in the more intensively farmed landscapes that surround the upland areas, and this network is three times more dense in the east of the Park (the old County of Gwent) than it is in the west (the County of Carmarthenshire). It is also the case that the path network is really a legacy network, resulting from a combination of historic use and historically inconsistent and parochial systems of recording and administration. As such, in some areas it is far from the optimum network needed to service today's user.

Unrecorded public rights of way

It is widely recognised that the process of recording paths on the definitive map was subject to different interpretations and was implemented differently and with differing levels of alacrity in different places. There are likely to be many paths that are in fact public rights of way, but that have simply not yet been recorded on the definitive map. The evidence that such paths are indeed public rights of way may come from historic sources (such as old maps) and/or from evidence from people that have used paths over a significant period of time. Such paths are often now termed 'Lost Ways'.

The Countryside and Rights of Way act has introduced a 'deadline' of 2026 by which time all currently unrecorded public rights of way need to be added to the definitive map if the rights that exist along them are to be protected. The project to organise and co-ordinate this substantial task is called the 'Lost Ways Project'.

Given the tourism importance of access to the upland landscape and the relatively low level of provision of recorded public rights of way in these areas, it is important to assess the adequacy of the total path network (as opposed to just the recorded public rights of way). Accordingly, information from air photographs which clearly show walked lines across the hills was 'captured' and added to the National Park Authority's GIS (geographic information system). This exercise identified 745km of paths (additional to recorded public rights of way) in the upland areas.

Unsurfaced, mostly traffic-free, tracks and permissive paths

These are often forgotten when considering path networks, but can provide important strategic links within the greater path network. Unsurfaced, unclassified roads are an identified part of the highways network and are usually maintainable at the public expense. These account for more than 500km of walkable paths in the Park, shown in Map Ref 2.1b. There are additionally a large number of publicly accessible tracks within forested areas (such as those on land managed by Forest Enterprise) adding an estimated further 620km of linear access.

Landowners occasionally permit a specified public right of access along paths where otherwise no public right of access would exist; these are normally termed permissive paths. The 'Tir Gofal' agri-environment scheme administered by the Countryside Council for Wales makes an annual 'per km' payment to farmers for allowing permissive access. The total length of this resource in the Park is negligible in comparison with other types of access (although it can be strategically valuable) and is not quantified here.

Total linear access

Further work is required before the extent of linear access in the Park can be confidently and accurately stated, and it is recommended that this estimate is confirmed and refined as better information becomes available. The best available estimate at present is shown by Table 2.1 below.

Table 2.1 *Total linear access*

Type	Length (km)
PROW	1983
Non PROW upland paths	745
Unsurfaced, traffic free tracks	500
Non PROW paths and tracks, including forestry	620
Total	3848

2.2 Area access

By custom and tradition the public have enjoyed open access to virtually all of the upland areas in the Park on a 'de facto' basis. Under new legislation (Countryside and Rights of Way Act) implemented 'on the ground' in May 2005, a 'right' of access on foot to these areas will be established. Map Ref 2.1a also shows Open Access in the National Park. The Act will extend access to those few upland areas that did not have such a strong tradition of access. With the new rights come new responsibilities, and the Act provides opportunities for landowners and authorities to restrict access for conservation and land management purposes.

Around 60% of the Park (800km²) will, subject to restrictions, be openly accessible to the public. It is thought that this will be the highest proportion of access land of any national park or county in England and Wales.

2.3 Implications for walking tourism of the Countryside and Rights of Way Act 2000

The key provisions of the Act in relation to walking tourism are the creation of new rights of access to 'open country' and 'common land'; these are the areas generally regarded as 'upland' in the context of the Park. The Act also provides a mechanism for landowners and others to restrict or withdraw (on a temporary basis) these rights. Given that the Park already enjoys extensive 'de facto' access (see above), there is some potential for the effect of the Act to actually be a reduction in accessibility of parts of the Park. At an England and Wales wide level, this scenario is an exception and most regions will see an increase in accessible countryside. This may itself have an impact on tourism, essentially a competitive business, where the quality and extent of countryside access may be as much of a factor in destination choice as, for instance, the quality of accommodation and other traditional determinants. Moreover, whilst the direct effect on walkers of restricted access may be very limited, the effects of publicity related to the implementation of restrictions could be disproportionately damaging to the development of walking tourism in the Park.

The integrated and dependent relationship between access and farming should be mirrored by the development of closer working relationships between the farming and tourism sectors. The Act has established 'Local Access Forums' that bring together a range of interests to advise on access issues. There are three forums in the Park and whilst some members have a tourism background, this could be further strengthened.

2.4 Walking tourism and the Rights of Way Improvement Plan

The CROW legislation requires access authorities (in this case, the National Park Authority) to prepare a strategy for the development and maintenance of the public paths. The strategy needs to consider existing and potential use of the path network and compare this to the current provision on the ground. Through a process of consultation, the strategy should prescribe the actions required to make sure that the access resource is managed to meet current and future demand.

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. The public path network is quite simply the largest visitor

attraction in the Park and is the foundation of the area's tourism income. Some access authorities have already recognised this relationship and are investing substantially in their public paths. For instance, in March 2004 Shropshire County Council allocated £1.5 million for a five-year programme of work, which will make over 2500km of hard-to-use rights of way in the county more accessible to local people and visitors. Authorities that fail to make the necessary investment risk losing market share to competing areas that are able to offer more accessible countryside.

In a national park environment where the local economy is so critically dependant upon tourism, the Rights of Way Improvement Plan may wish to focus on walking and activity tourism as a key rationale for the better funding and management of the path network.

Statutory Guidance requires local highway authorities to consider the needs and circumstances of people with a range of expectations, interests and levels of ability. They should, for instance, consider the adequacy of routes in order to support local tourism, economic regeneration or community-led initiatives. There is also specific guidance about how the Rights of Way Improvement Plan should consider the special interests of those with restricted mobility, and these are currently being addressed within the RoWIP for the Brecon Beacons National Park Authority.

2.5 The nature of the BBNP walking offer

2.5.1. Perceptions of the walking offer

There is no consistent set of attributes by which the nature of the walking offer of an area can be described. A general understanding of how a place translates into a particular kind of walking is something which is acquired by some, and often assumed of others. The range of possible attributes might include:

- subjective judgements about landscape and scenery
- land form and terrain
- land use
- height
- gradient
- remoteness
- fitness and stamina requirements
- length of walk

However, the answer to the question, "If I come to this area, what sort of walking can I expect to do here?" is an important one. The answer may be provided by walking publications and guides, which are of course selective in the information that they provide. Often they are led by the market for the publication, being focused on the requirements of an imagined reader; they may also be led by the interests of the author, likely themselves a seasoned walker.

The BBNPA website www.visitbreconbeacons.com invites visitors to walk in the Brecon Beacons:

"Step into another world ... If you enjoy walking, then you'll love the Brecon Beacons National Park."

The Wales Tourist Board website www.walking.visitwales.com suggests that:

“in the Brecon Beacons there are comfortable routes and paths for walkers of all levels, as well as the wild, open spaces for which this Park is known and loved.”

Wales Tourist Board describes the Brecon Beacons and the Black Mountains separately, as two of the thirteen walking areas that make up Wales.

When tourism enterprises in the Brecon Beacons NP area were asked about the kinds of walking experience the area is known for, they responded as follows.

‘Upland terrain, including popular summits’ was ranked first, followed by ‘Rolling hills and open ridges’.

In this context,

‘Rugged upland terrain, wild and remote’ was considered third most important.

However, enterprises placed these in a different order when they were asked about the kind of walking experience that their visitors were looking for.

‘Rolling hills and open ridges’ is now ranked first, followed by

‘Upland terrain, including popular summits’.

‘Gentle terrain following paths through farmland and villages’ and

‘Managed countryside sites’ now overtake

‘Rugged upland terrain, wild and remote’.

In other words, potential visitors will not necessarily recognise that the walking that they are looking for will be found in the Brecon Beacons.

2.5.2. Arriving at some objective evaluation of the walking offer

It is difficult to gauge how the walking offer of the Brecon Beacons National Park compares with the offer of alternative destinations. www.walkingworld.com is a commercial website that offers subscribers the opportunity to download carefully described, graded walks selected from across the UK. Their grading system offers a relatively objective way of comparing the described walking product of the BBNP with other walking areas.

The Walkingworld grading system gives an indication of the difficulty of the walk and of the conditions the walker is likely to meet. Basically the grades refer to the type of terrain, rather than the amount of exertion required.

The five grades that are used are described as follows:



(i) **Gentle Stroll**: the walk is likely to be under 3 miles and there are no obstacles, such as difficult stiles, awkward footbridges, steep slopes, etc. The route is well-surfaced, and could be done in almost any type of footwear.



(ii) **Easy Walk**: the walk is likely to be under 7 miles. Paths and tracks are easily walked in any weather, there are no significant navigational difficulties, and stiles and gates are in good repair. In favourable weather the route could probably be walked in trainers or other lightweight shoes.



(iii) **Moderate Walk**: the walk is likely to be more than 7 miles. There may be some more awkward obstacles, like badly maintained gates, and places where navigation involves more thought and skill. The walk should be done in boots or walking shoes.



(iv) **Hill Scramble**: the walk goes into regions where exposure to weather and difficult terrain means that walkers should always be equipped with proper footwear, spare clothing and food and drink. Map and compass skills are necessary, though they may not have to be used. The route may require some mild scrambling - the use of hands as well as feet - but the dangers are limited. Walking the route in winter should be carefully assessed.



(v) **Mountain Challenge:** the walk reaches higher altitudes (e.g. over 2,500ft) where weather conditions can change rapidly. The group should always have an experienced leader. There may be sections where the path is exposed or difficult and a fall could be serious. Participants must be fit, familiar with this type of terrain, and equipped for every eventuality. Walking the route in winter would require specialist skills.

A search of the Walkingworld database shows that virtually one quarter of the walks offered in Wales are associated with the Brecon Beacons National Park.

Table 2.2 Distribution of walk category selected by Walkingworld for specific areas of Wales

Grading		Brecon Beacons		Black Mountains		Black Mountain		Snowdonia		Wales	
			%		%		%		%		%
	Gentle Stroll	0	0.0	0	0.0	0	0.0	3	8.1	16	5.6
	Easy Walk	7	19.4	4	11.8	0	0	8	21.6	93	32.3
	Moderate Walk	21	58.3	26	76.5	0	0	16	43.2	145	50.3
	Hill Scramble	8	22.2	4	11.8	1	100	5	13.5	28	9.7
	Mountain Challenge	0	0	0	0	0	0	5	13.5	6	2.1
	Total	36	100	34	100	1	100	37	100	288	100

Compared with Wales as a whole, and also with Snowdonia, the walking experiences offered within the area of the Brecon Beacons National Park are particularly weighted towards 'Moderate walks' and 'Hill scrambles'. No walks are included that are graded at either extreme. Walks in the categories "Gentle strolls" and "Easy walking" are certainly under-represented.

The more demanding routes offered in the National Park, classified as 'Hill scrambles⁶', include:

In the Brecon Beacons

Llanfrynach – Gist Wen - Fan-y-Big – Cefn Cyff 16.9km
 Llangynidr – Llangynidr Mountain – Chartist Cave – Llangynidir 12.9km
 Llangynidr – Tor y Foel – Talybont – Llangynidr 14.5km
 Storey Arms – Cwm Llwhch – Llyn Cwm Llwhch 12.9km
 The Beacons Horseshoe (from the south east) 11.3km
 Cwm Gwdi – Bryn Teg – Pen-y-Fan – Cwm Gwdi 11.3km
 Torpentau – Graig fan las – Craig Cwareli 12.9km
 Talybont Reservoir Circuit 19.5km

In the Black Mountains

Grwyne Fawr and Waun Fach 15.3km
 Tal Trwynau – Pen twyn Glas –the Grwyne Fechen 14.5km

⁶ 'Hill scramble' is not a particularly appropriate description for any walk in the BBNPA, as there is little if any requirement for scrambling. However, these walks can be seen as more demanding than 'Moderate' walks and less demanding than 'Mountain Challenge' walks

The Hermits' Coach Road – Waun Fach – Pen-y-Gadair Fawr 17.7km

On the Black Mountain

Fan Foel – Bannau Sir Gaer – Llyn y Fan Fach 9.5km

Tafarn-y-Garreg – Fan Hir – Fan Brycheiniog 12.5km

2.6 Constraints on walking in the Brecon Beacons National Park

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

- The state of the access network
- Control and repair of erosion damage
- Damage to and disturbance of wildlife
- Safety issues
- Parking (including security) and traffic congestion

2.6.1. The state of the network

In preparation for the introduction of Rights of Way Improvement Plans, CCW commissioned a study to identify the current condition of rights of way in Wales.⁷

The study concluded that public rights of way in Wales are generally in poor condition. In 2002, the length or proportion of the footpath network that was found to be 'satisfactory' was 55% in Wales. On average users may expect to encounter a problem every 230m, and every 650m will encounter a problem that renders a path unusable. Much less than half (42%) of the individual path links in the network are wholly free from unsatisfactory furniture and other obstacles.

The condition of paths as determined by a similar survey in England in 2000⁸ indicated that the distances between problems that rendered a path unusable was approximately 2km. By this measure the path network in Wales is broadly three times worse than its counterpart in England.

However, National Parks in Wales are shown generally to have paths in better condition than the Welsh average, and the paths in the Brecon Beacons National Park were found to be in the best condition of all paths by some measures. The National Park Authority aims to keep all public rights of way open, adequately waymarked and in a satisfactory condition for public use. Within Wales, the Park is able to provide a competitive quality of access resource.

Variations in the standard to which rights of way are maintained, in England as well as Wales, are being recognised. Visitors, particularly those from areas where local authorities are investing in their path networks, will bring with them an expectation of quality access provision. If return visits and favourable 'word of mouth' promotion is to be achieved, it is clearly important that they find comparable if not better quality in the Park.

⁷ Rights of Way Condition Survey CCW 2002, published March 2003

⁸ The Rights of Way Condition Survey 2002, Countryside Agency, CA94

The path condition in areas bordering the Park may also contribute to visitor perception of the walking resource of the whole area. Rights of Way in Torfaen BC and Blaenau Gwent BC appear to be easier to use than some others.

Across Wales, the total cost of bringing the whole path network into a satisfactory condition is estimated at approximately £26m or £779 per km., and the total annual maintenance cost is estimated at approximately £8.37m or £252 per km. Currently, the poor condition of the path network in Wales may prevent its potential being realised in terms of providing access to the countryside, supporting sustainable tourism, amenity use by local people and potential health benefits to users. The report concludes that “the value of any investment being made in initiatives of these types would be enhanced if there were a satisfactory public rights of way network”.

The annual economic value to Wales of the path network has been estimated at £548m⁹. Comparing this with the investment required to maintain and enhance such benefit makes an overwhelming economic case for improving and maintaining the rights of way system.

2.6.2. Erosion control

It is known that parts of the Access Network in the Brecon Beacons National Park are vulnerable to damage by concentrated use. This is recognised in the National Park Management Plan with an objective to protect heavily used and/or fragile areas from all kinds of recreation pressure.

The Brecon Beacons National Park Local Plan¹⁰ defined a number of pressure areas, defined as areas where an increase in recreational use is likely to make seriously worse existing problems, including physical erosion. Sites identified where walking is a contributory factor include: Bwlch y Giedd; Nedd Fechan; Mellte, Hepste and Sychryd valleys; Brecon Beacons access and ridge routes; Torpantau; Llangynidr; Cockit Hill to Pengenffordd; Black Mountains north scarp/Hay Common; Offa's Dyke Path; and approaches to the summit of Sugar Loaf.

In some cases, the support of the public in controlling or limiting this damage has been invited. For example, the National Trust own almost 10,000 acres of the central massif of the Brecon Beacons mountain range, dominated by the table topped summits of Pen-y-Fan and Corn Du. The popularity of the area has contributed to the deterioration of many kilometres of upland footpaths, and the National Trust is undertaking a programme of footpath erosion control, through upland path repair and visitor monitoring. A leaflet explaining this work has been distributed within the Park by the National Trust, inviting visitor co-operation. Brecon Beacons Holiday Cottages have enlisted the support of their clients in contributing to the work to manage and repair damage.

2.6.3. Damage and disturbance to wildlife

The plants and animals and the distinctive habitats in which they live are major contributors to the Park's special qualities. Recreation is just one of a variety of factors with the potential to threaten these habitats and the species that they support. It is widely recognised that informal outdoor recreation in general and walking in

⁹ Best Foot Forward – A Walking Tourism Strategy for Wales, Wales Tourist Board, May 2002.

¹⁰ Brecon Beacons National Park Local Plan 1999

particular have an extremely low direct environmental impact, in comparison with the land use industries and built development. It is nonetheless important to give careful consideration to possible unwanted conservation impacts from walking.

Recreation is identified by the National Park Management Plan as a threat to three habitat types and, of these (blanket bog and raised bog, flush, mire, swamp and fen communities) one would appear to be most at risk from walking. Thought also needs to be given to avoiding any damage and disturbance to individual species that may also occur in more isolated incidents. Ground nesting birds are a particular issue in this respect.

The task of collating and managing species and habitat data for the area of the Park rests with the 'Brecon-based Biodiversity Information Service'. Working with the National Park Ecologist a list of species most likely to be sensitive to disturbance by walkers was prepared and BIS records relating to these species were mapped. Using GIS an analysis was completed to determine the extent to which potential conflict between species sites and public paths existed. In this case 'potential conflict' was determined simply as close proximity (within 200m) between the location of a potentially disturbable species and a public path. Map Ref 2.6 (see Appendix) shows the density and distribution of species in relation to the path network. The following four maps distinguish between different groups of species, as follows: ground nesting birds and animal species (Map Ref 2.6a); raptor species (Map Ref 2.6b); fungi (Map Ref 2.6c); and plants (Map Ref 2.6d).

The analysis shows that the proportion of species records that are located close to paths is low across the Park, but higher in the lowland areas where both the species records and path network is at its densest. However this does not really present the whole picture and there are three main limitations with this analysis:

1) Although BIS held species data generally gives the location of a record, it does not consistently show the nature of the record. For instance the record may be of a nesting site, or it may simply be a sighting. The nature of the observation is critically important when trying to understand any potential conflicts

2) If the map shows a blank for a particular species it does not mean that the species will not be found there - it simply means there is no record of it. Given that there has been very limited systematic survey of species, it is likely that many parts of the species map will be 'blank', not because there are no species, but because no-one has looked and recorded their findings.

3) The real likelihood of a species being disturbed depends significantly on the particular species, its detailed location relative to the path and also the level and type of use of the path itself. Typically badger setts may be found very close (or under) well used paths with little conflict caused and a ground nesting bird may be completely undisturbed by a path that is most used outside of the nesting season.

Better use of species data to inform strategic management of activities such as walking will only be possible when the quality and completeness of species data is improved.

The Brecon Beacons National Park Local Plan¹¹ defined a number of vulnerable areas, defined as areas where wildlife habitats, archaeological features or qualities of

¹¹ Brecon Beacons National Park Local Plan 1999

remoteness are especially sensitive to local increases in visitor numbers or recreation activity. Some of these are also 'pressure areas' (see above).

The EU Habitats Directive gives special protection to areas designated as Special Areas for Conservation (SACs). Eleven sites in the Park have been nominated as candidate SACs. The NPA is implementing a Local Biodiversity Action Plan (LBAP) in partnership with other organisations and local groups.

While a key objective is to increase the economic benefit derived from walking tourism, this does not necessarily equate either to increasing walker pressure on existing paths or extending walker pressure to new locations. However, where development of the product is likely to intensify or spread pressure then the potential conservation impacts need to be understood.

For this reason the development of this strategy has involved the collation of habitat and species data for the Park, and an analysis of the coincidence of public paths with the more sensitive of these has been undertaken. This shows that there is some coincidence between species rich areas and high level of access, and in these areas further specialist advice will need to be sought before projects that may increase pressure are implemented. However the absence of any apparent coincidence between areas of high access and high conservation value does not mean that developments can proceed without further consideration. This is largely because the species data for the Park is very incomplete, and the absence of species information does not mean an absence of conservation interest. More useful quantitative analysis will only be possible as better quality and more comprehensive ecological data becomes available.

2.6.4. Safety

Safety issues are paramount when walking in the mountains or near water. The Brecon Beacons are no exception and some parts require great care. NPA staff are trained in leadership and safety, and risk assessments are carried out for all its activities. Safety advice for walking in the BBNP is contained in a "Be Safe" leaflet. Safety on the hills revolves around careful route planning and notification, taking the right equipment and watching the weather as conditions can change rapidly, and such advice is included in BBNP publications and in many commercial walking guides. Mountain rescue is the responsibility of the police, and largely carried out by voluntary teams. Four civilian mountain rescue teams cover the Brecon Beacons National Park and South Wales.

2.6.5. Traffic congestion and car parking

Map Ref 2.6e shows the distribution of car parking provision, distinguished by capacity. A number of small, remote and informal car parking places are used and sometimes recommended in order to access particular walking routes. On busy days, these can become full and cause congestion and access difficulties. Some areas have been defined in the Local Plan as 'pressure areas' because an increase in recreational use is likely to make seriously worse existing problems of traffic congestion or inconvenience to local communities. These include: Cerrig Duon; Cwm Cynwyn; Talybont-on-Usk; Llangorse Lake, common and village; Black Mountains north scarp/Hay Common; Llanthony Valley; Llanwenarth access road to Sugar Loaf. Circumstances change over time, and these named sites may need to be kept under review.

The wider issue of positive traffic management across the Brecon Beacons National Park is beyond the scope of this study.

There is also concern about problems with crime in car parks, and the need for more secure car parking has been expressed. This is of special interest to walkers, who often leave vehicles unattended for a considerable period of time. A successful Car Park Watch scheme has been established but this remains a perceived as well as (to a lesser extent) a genuine problem.

2.7 The walking resource

The walking resource of the Brecon Beacons National Park is varied and extensive, and is especially rich for those who:

- choose to walk independently;
- read maps with confidence;
- are well prepared and experienced walkers;
- are prepared to deal with any difficulties that they encounter, including obstructions and poor weather conditions.

However, many potential visitors to the Park lack one or more of these attributes, and for them the richness of the resource is conditional upon the quality of the access network and the information provided about, and support for, opportunities to use it.

A walking tourism strategy has the greatest opportunity to influence the experience of these visitors, and it is on them that attention should primarily be focused.

In this section we consider the walking opportunities that are currently offered to visitors in a variety of ways by the National Park Authority and its partners.

2.7.1. Places to visit for a walk

The following locations are widely promoted, and to varying degrees managed, as places to visit, where a walk may form part of the visit.

The National Park Visitor Centre (Brecon Beacons Mountain Centre) at Libanus is managed by the BBNPA, and is the starting point for a range of walks of varying lengths.

Craig-y-Nos Country Park is managed by the BBNPA, and includes waymarked trails that offer walks of up to an hour.

Waterside Places, published by the Brecon Beacons National Park Authority, suggests sixteen waterside locations for a visit, including rivers, waterfalls, reservoirs, lakes and canals. While this is not badged as a walking publication, there are many suggestions for walking opportunities, from short walks of 1.6km to an all day walk around the waterfall area.

Garwnant Visitor Centre, one of a number of Forestry Commission Wales (FCW) sites in the Brecon Beacons National Park, is the one that is promoted most strongly by FCW, and managed by them with full visitor facilities. There are two waymarked trails (Willow Walk (30mins) and Wern Walk (1hr)), and the Taff Trail passes through

the Centre. The site at Glasfynydd has a promoted trail, Dare you drink from the Physician's Well?. Other sites promoted on the FCW website as places to visit, but not necessarily to walk, include Taf Fechan, Coed Taf Fawr, Cwm Giedd, Blaen Llia, Mynydd Du and the Waterfalls.

The National Trust *Countryside Guide to Wales* identifies three locations in the Brecon Beacons: the Brecon Beacons themselves, including Pen-y-Fan and Corn Du; Sgwd Henrhyd Falls, highlighting a 6.4km circular walk; and Sugar Loaf, indicating a 4.8km walk to the summit. *30 Places to Visit* also lists these three locations, together with Dinefwr, on the outskirts of Llandeilo, with a number of scenic walks including a wooded boardwalk.

Craig Cerrig-gleisiad a Fan Frynych is a National Nature Reserve. Independent visitors are encouraged to visit the Reserve, using rights of way or the additional paths that have been provided by CCW. The latter may be closed for certain periods of time to conserve sensitive wildlife or to prevent the erosion of certain areas.

Places to visit with Easier Access, published by Brecon Beacons National Park Authority, is a guide intended to give an idea of suitable places to visit in the Brecon Beacons National Park for those who are disabled, less mobile, visually impaired, elderly or parents with children in pushchairs.

2.7.2. BBNPA promoted walks

The Brecon Beacons National Park Authority publishes a number of one-third A4 booklets, detailing walks based around one place or a particular bus service. The endorsement of the Park Authority implies a commitment to ensure that these routes can be walked with confidence. It is not entirely clear who is the audience for these walks, and the purpose and presentation of the booklets is currently under review.

Walks from the Mountain Centre

Circular walks from 11.3km to 20.9km taking from half a day to a full day, starting and ending at the Mountain Centre.

Average distance: 15.8km

Range: 12.1km - 20.9km

Walks from Abergavenny

Eleven routes from gentle strolls to upland walks exploring the east of the Park Routes described introduce the varied delights of the nearest 'bastions', but also offer gentle exploration of waterside routes.

Average distance: 11.3km

Range: 4.8km –19.3km

Walks in the Craig-y-nos Area

Thirteen walks in the valleys and uplands in the west of the Park.

Average distance: 5.3km

Range: 2.4km – 10.1km

One Way Walks by Bus

Eleven linear walks based on access using public bus services in the Park.

Average distance = 9.2km

Range: 1.6km –16.1km

Walks in the Brecon Area (out of print)

All the walks start from the Tourist Information and National Park Centre in the main car park of Brecon

Average distance: 11.4km

Range: 3.2km –16.1km

2.7.3. Trails and promoted routes

A number of long distance trails and regional routes pass through or near the Brecon Beacons National Park, including:

Offa's Dyke Path National Trail (Chepstow-Prestatyn, 270km). A trail along the Welsh border, much of it high and some stretches rough and remote. Offa's Dyke Path National Trail passes along the eastern boundary of the Park, entering the Park at Pandy and leaving near Hay-on-Wye. Affords relatively easy (if high) walking and views over the Welsh Marches.

The 93km Taff Trail is a walking/cycling route that links Brecon to Cardiff and has a circular option for walkers around the Central Beacons area. It follows canal paths, country lanes, former railway lines and forest tracks, to cross the stunning scenery of the Brecon Beacons. The route is described in six sections as a series of leaflets (section 5 Merthyr Tydfil to Talybont-on-Usk, section 6 Talybont-on-Usk to Brecon)

Usk Valley Walk (Caerleon-Brecon, 80km). Waymarked path following the River Usk from its source in the Brecon Beacons National Park, to its end at the Severn Estuary. There are plans to extend the walk to the source and beyond, approximately thirty miles (48km), following the northern fringe of the Park. Quiet, peaceful and mostly low-level, including towpath of Monmouthshire and Brecon Canal.

Wye Valley Walk (Chepstow-Plylimon, 218km) Attractive valley route crossing from England, via Hereford and Hay-on-Wye, into Wales. Touches on the BBNP around Hay-on-Wye.

Cambrian Way (Cardiff-Conwy, 440km) A tough, high-level route across the Welsh mountains, including substantial parts of the Brecon Beacons NP in its southern sections. The BBNPA currently does not promote this route.

2.7.4. Shorter promoted walks

Various walks have been developed, in particular by neighbouring local authorities, often supported by the production and distribution of simple one-off leaflets. These are usually developed by an authority's countryside service, frequently independently of the tourism service for the same authority. Little thought appears to have been given to a strategic or market led approach to the development of these walks and their associated information and publicity. Examples include:

- Bryn Oer Tramroad – an 12.9km historical route (bridleway status) along a former tramroad that linked the coal, iron and limestone of the heads of the valleys area to the canal at Talybont. Booklet 'Walks and Rides along the Brinore Tramroad' available from Brinore Tramroad Conservation Forum.
- Blaenavon Circular Walk – a three hour walk over the mountain above Blaenavon, Torfaen County Borough
- Llandovery Country Walk, Llwynwermud Country Walk, Carmarthenshire County Council

2.7.5. Guided walks

Two guided walks programmes are offered within the Park, one by the National Park Authority and one by the Brecon Beacons Park Society.

The Brecon Beacons National Park programme of guided walks and events offered 93 walks in 2004, spread across the various classifications of difficulty as shown in Table 2.3.

Table 2.3 Representation of walk classifications within BBNP programme

Brecon Beacons National Park – Guided Walks and Events 2004		
Classification	Number in programme	%
Easy	14	15
Moderate	36	39
Energetic	25	27
Strenuous	18	19
Total	93	100

Easy – taking it at an easy pace, suitable for novice walkers

Moderate – some ascent involved, taken at a steady pace

Energetic – some steep ascents, good for improving fitness

Strenuous – several steep ascents, a good level of fitness required and usually over 12 miles (19.3km) in length

Walks are distributed across all four of the classifications, with a focus on moderate and energetic walks. Some walks are led by BBNPA staff and many are led by volunteers.

In 2004, the average length of walk in the National Park programme was 12.1km, ranging from 4.8km to 25.7km. The majority of walks (81%) were at the weekend, with just 19% on weekdays.

The programme also includes a significant number of events as well as guided walks. The average number of participants on each walk was 7.9, and feedback has been positive: 100% of those asked said that they would come on a BBNPA walk again.

The Brecon Beacons Park Society programme is run entirely by volunteers. There are a large number of walks and they are somewhat more demanding, as follows:

Table 2.4 Representation of walk classifications within BB Park Society programme

Brecon Beacons Park Society – Guided Walks Programme 2004		
Classification	Number in programme	%
Easy	3	3
Moderate	27	22
Energetic	69	57
Strenuous	22	18
Total	121	100

Strenuous - walks require fitness and stamina to cope with several steep climbs and/or cover a good distance at a steady pace.

Energetic - walks generally involve two steep climbs but they will still require determined application

Moderate - walks will seldom have steep climbs but if they do the climb will be taken at a relaxed pace.

Easy - there is no description of what constitutes an easy walk.

Compared with the NPA walks, there are significantly more energetic walks and fewer easy/moderate.

In addition, the programme also included eight day-walks along the proposed Beacons Way which, although not classified, are likely to be at least 'Energetic' and probably 'Strenuous'.

The Park Society's programme has been almost entirely a weekend programme, with the exception of one week in August and the pioneer first walk along the Beacons Way. From September 2004, a programme of Friday walks has been added, and the response will be evaluated.

2.8 Development of new access

A number of different organisations are working independently to develop and promote the following new access in and around the Brecon Beacons:

- The Beacons Way was launched in 2005 by the Brecon Beacons Park Society as a new linear walk (157km) across the Brecon Beacons National Park, from Abergavenny (the Holy Mountain) to Llangadog. It is described as an 8 day walk, in daily sections of 15 –27km. Map 3 shows the proposed route, together with parts of the Taff Trail, Offa's Dyke National Trail, Usk Valley Walk and Wye Valley Walk.
- The Epynt Way will be an 80km multi-activity route around the Sennybridge Training Area, which is planned to open shortly.
- Eluned's Way is a project put forward by the Wellsprings Fellowship, to develop a waymarked footpath between Castell Dinas and Brecon that will follow Eluned's 6th century journey.
- The Forestry Commission have plans to develop a circular walk at Cwm Giedd up the river Giedd, returning along the Nant Ceiliog.

- The Crychan and Halfway Forest, Cynghordy, Carmarthenshire is a joint initiative between the local community and the Forestry Commission to provide new opportunities for walking and other access.
- Blaenafon, Walking Town is a joint initiative on the edge of the Brecon Beacons National Park between Wales Tourist Board and Torfaen Borough Council, based around the World Heritage Site at Blaenafon. A pack of 8 walks has been prepared, with walks ranging from 4.0km to 16.9km, and featuring a two part “Iron Mountain Trail”. The pack was launched at Easter 2005, with an associated website.
- Llanfynydd Walking Pilot is a joint initiative between Wales Tourist Board and Carmarthen County Council Tourism Department, bringing tourism providers together to promote the area as a walking destination and monitor the impact of the project in an area where there has been a recent push on upgrading and opening paths in the area.

2.9 Walks based on public transport

It is quite possible to plan a walk in the Brecon Beacons using public transport.

- There is a reasonable network of regular bus services focused on the historic market town of Brecon, which acts like the hub of a wheel, with spokes from Hereford and Hay on Wye, Abergavenny, Cardiff and Merthyr Tydfil and from Swansea via Craig y Nos Country Park.
- This suggests Brecon as a good base for to explore the National Park without a car, with a choice of places to walk every day of the week.
- *Discover the Brecon Beacons* is a free National Park leaflet that contains most local bus timetables, suggested walks etc.
- Abergavenny offers a good railhead for the National Park, given the Marches Line rail services to Abergavenny (through services from Manchester, Crewe, Shrewsbury, Newport, Cardiff, Bristol, Bath and easy connections at Newport to London Paddington)
- From the end of May to the end of August, the Beacons Bus operates on Sundays and Bank Holiday Mondays connecting six centres (Carmarthen, Swansea, Bridgend, Cardiff, Newport and Hereford) with Brecon, and offering access to many parts of the National Park. A free BBNP publication, “*One Way Walks with Beacons Bus*”, suggests a number of linear walking routes based on these services.
- The western area of the National Park, around the Black Mountain, is lightly populated with little or no public transport. There are a few services around this edge of the Park, including the Heart of Wales Line from Swansea and Shrewsbury to Llandeilo or Llandovery, providing good access for those prepared to walk some distance to the Park boundary.

The frequency of bus access along individual routes into the National Park is shown in Map Ref 2.9a, with Map Ref 2.9b indicating the seasonality of services.

Analysis suggests that, with careful planning, it is possible to gain access on foot to most of the Park. However, the timing of first and last buses does not always allow for walks to all areas away from the roads to be completed, including some of the

popular summits. Map Ref 2.9c and Map Ref 2.9d show the parts of the Brecon Beacons National Park that are accessible by bus and then on foot at weekends, assuming a walking speed of 1km/hr and 2km/hr respectively.

Interestingly, additional services during the week often enable a longer stay in the Park than at weekends, and open up more of the remoter areas for access on foot. Map Ref 2.9e and Map Ref 2.9f show for comparison the parts of the National Park that are accessible by bus and then on foot on weekdays, assuming a walking speed of 1km/hr and 2km/hr respectively.

3 FINDING OUT ABOUT WHERE TO WALK

A first time visitor's experience of walking in the Brecon Beacons National Park will be highly dependent on the ease with which they can gain easy access to helpful information setting out appropriate options that match their walking interest. This section reviews the sources of information currently available.

3.1 Pre-arrival information

When considering or planning a possible trip to the Brecon Beacons, potential visitors are most likely to turn to one of two streams of information: one is provided by the National Park and the other by Wales Tourist Board (WTB). Both have websites that include information about walking, backed up by printed information.

WTB Walking Wales website

WTB describe the Brecon Beacons and the Black Mountains separately, as two of the thirteen walking areas that make up Wales.

They suggest the following as the highlights of the Brecon Beacons, mentioning specific BBNPA publications for route descriptions and further information:

- Pen-y-Fan, the highest point in the Brecon Beacons
- Waterfalls of Ystradfellte
- Llangorse Lake
- Twyn-y-Gaer, from the Brecon Beacons Mountain Centre in Libanus
- Craig-y-Nos Country Park
- Abergavenny, as a base to explore the Monmouthshire and Brecon Canal
- Gospel Pass, at 541.9m the second highest road in Wales
- The Black Mountains, rising over 600m and offering ridge walks with wonderful views.

The Black Mountains are clearly distinguished from the Black Mountain, which is mentioned as a spectacular wilderness environment in its own right, with no reference to further information.

BBNP Website

Currently, the BBNP website carries limited information about walking opportunities, referring customers to the mail order system for selected publications, *Publications by Post*, where BBNP's own publications can be ordered together with selected commercial publications (see below). Specific reference is made on the site to the Offa's Dyke Path National Trail, Beacons Way and the Taff Trail.

Telephone contact with Information Centres

The National Park Authority and the local authorities/Wales Tourist Board each support a network of Information Centres. Joined up service delivery is currently being planned and implemented, which will improve the fragmented response that has historically prevailed. Phone calls to a number of the NP Information Centres and Tourist Information Centres in early 2004 indicated that co-ordination between the two services has been poor, even where they are co-located. Information offered was patchy: there was no co-ordinated response or ready prepared material to fulfil

enquiries about walking opportunities in the National Park on a consistent basis, although some individual staff went to some lengths to photocopy information to create their own mailing pack. Where offered, the BBNPA Publications List provided a useful overview, although there is insufficient information about individual publications to make an informed choice.

3.2 Commercially published walking guides

Commercially published walking guides are an important source of ideas and information for potential visitors, and there are a number of different commercial guides that feature walks in the Brecon Beacons National Park. The selection below includes a brief indication of the nature of the walks that are included. Certain walking publications have been selected by the NPA for inclusion in its 'Publications by Post' service: these are indicated below with an asterisk*. Others are on sale in National Park Information Centres.

Brecon Beacons and Glamorgan Walks*

Jarrold Publishing, Pathfinder Guide.

6 walks in the Brecon Beacons are graded as short, easy walks; 10 walks are graded as walks of modest length, likely to involve some modest uphill walking; and 8 walks are graded as more challenging walks which may be longer and/or over more rugged terrain, often with some stiff climbs

Average distance: 9.3km

Range: 4.0km – 15.3km

Classic Walks in the Brecon Beacons National Park*

Chris Barber, Blorenge Books

Average distance: 13.4km

Range: 1.6km – 27.0km

Circular Walks in the Brecon Beacons National Park*

Tom Hutton, Gwasg Carreg Gwalch

12 circular walks highlighting the landscape, beauty and history of the Brecon Beacons National Park

Average distance: 10.8km

Range: 5.6km - 19.3km

Walking the Brecon Beacons and The Black Mountains*

David Hunter, Sigma Leisure

Average distance: 10.6km

Range: 4.8km – 20.9km

50 Walks in Brecon Beacons & South Wales

AA Publishing

Each walk is rated for its relative difficulty compared to the other walks in this book. Walks marked '1' are likely to be shorter and easier with little total ascent. The hardest walks are marked '3'.

5 walks in the Brecon Beacons are graded '1'; 12 walks graded '2'; and 7 walks graded '3'

Average distance: 17.2km

Range: 7.7km – 29.8km

Exploring the Brecon Beacons National Park

Chris Barber

Regional Publications

Average distance: 2.6 hours

Range: 0.25 – 7 hrs

Mountain Walking in the Brecon Beacons

Kevin Walker, Heritage Guides

Average distance: 12.9km

Range: 6.4km – 22.5km

Of the 115 walks we looked at in detail, high level walks featured strongly: 41 (36%) included sections over 600m and a further 26 (23%) included sections between 400-600m.

Corn Du, Pen y Fan, Twmpa and Bal Mawr are frequently featured in walks in commercial guides, together with sections of the Taff Trail and Offa's Dyke Path.

None of the commercial guides currently available makes a special feature of opportunities to eat and drink in association with the walks: just 27 walks (23%) refer specifically to the availability of refreshments in the vicinity.

3.3 Membership organisations and magazines

Regular walkers or those with an interest in walking may be members of organisations or subscribe to magazines that keep them informed about opportunities. The Ramblers Association (RA) has 142,000 members, strongly weighted towards older age groups: 76% of their members are 50+. A very high percentage of their membership are active walkers. The three most popular walking magazines are *Country Walking* (102,699 readers), *Trail* (77,545 readers) and *TGO* (The Great Outdoors), and each regularly carries features that relate to the walking interests of their readership, which are very well regarded by them.

3.4 Packaged walking offers

Packaged walking holiday opportunities are increasing, and there are a number of operators active in the UK, including some in Wales. Potential visitors are likely to find out about packaged walking offers through prior knowledge/personal recommendation, adverts in specialist magazines, and internet searches.

Walking packages fall into two main types: centre-based holidays and linear itineraries, sometimes with baggage support.

There are a number of smaller operators that base their holidays entirely on their own accommodation, and the walking opportunities available in the immediate area. Essentially, they are accommodation operators who are adding both profile and value to their product.

The larger operators use a broader range of accommodation and offer product over a wider geographical area. Most offer a mixture of centre based holidays and linear itineraries, but some choose to specialise. These operations vary in size: many are quite small but there are some substantial players.

Currently, packaged walking holidays have very little impact in the Brecon Beacons National Park: only a very small number are offered.

Locally based operators include HF Holidays, Hostels Wales, Kevin Walker Mountain Activities, Marches Tours and YHA. Most operators with a more extensive programme appear to select the majority of their offers based on the existence of a named and promoted route. Offa's Dyke Path is offered by a number of operators, although it has only limited impact on the Brecon Beacons. Two operators offer holidays on the Cambrian Way.

Packaged walking holiday operators include:

Byways Breaks*

Offering one programmed holiday of 4-7 nights each week, some of which are based in the Marches and Mid-Wales, though not specifically Brecon Beacons. They are listed by the Offa's Dyke Association, although their current programme appears not to include Offa's Dyke.

CHP Walks and Breaks*

Unable to locate and believed to have ceased trading

Celtic Trails*

Wales' leading independent walking specialist – tailor-made independent walking holidays include Offa's Dyke Path, Cambrian Way

Contours Walking Holidays*

Specialists in self-guided walking holidays based on trails across the UK, including Offa's Dyke Path

Footpath Holidays*

Offer centre based, transport supported 'daypack hikes' on long distance paths and national trails, including Offa's Dyke Path South, offered as 6 days walking based at Abergavenny

HF Holidays

Graded guided walking holidays, which include a year round programmes in Brecon Beacons run from their own 30 bedroom country house hotel in Brecon, Nythfa House. In 2004, HF also offered two scheduled 14-night holidays with luggage transfer on Offa's Dyke Path, and one opportunity to walk Cambrian Way (South) over 6 days, based at Brecon.

Instep Linear Walking Holidays

Self-guided holidays include Brecon and Abergavenny Canal, Offa's Dyke Path, with accommodation in small guesthouses, farms or hotels supported by luggage transfer.

Kevin Walker Mountain Activities

Navigation, walking and climbing courses for individuals and groups including courses in the Brecons run from Bear Hotel, Crickhowell.

Marches Walks

Guided and self-guided centre based walking holidays including the Black Mountains, Brecon Beacons and Offa's Dyke Path, based on their own accommodation at Glasbury-on-Wye.

Wycheway Country Walks

Self-guided walking holidays include Offa's Dyke Path

YHA

Centre based breaks and holidays include in the Brecon Beacons

*Listed on the WTB 'Walking Wales' website

3.5 Post-arrival

3.5.1. Information centres

BBNPA provides a range of information services to the public. Recently, there has been a review of the whole service.

There are five National Park Information Centres:

- National Park Visitor Centre (Mountain Centre) at Libanus
- Craig-y-Nos Country Park
- Abergavenny
- Brecon
- Llandovery

Recently, ten proprietors of local village service outlets throughout the Brecon Beacons National Park have been selected by the Park Authority to act as Village Information Agencies, providing information about tourist facilities. They are located at Crickhowell, Talybont-on-Usk, Pontneddfechan, Llythrdyr, Brynamman, Govilon, Llanddeusant, Abercraf and Sennybridge.

Tourist Information Centres at Abergavenny, Blaenavon*, Brecon, Crickhowell*, Hay-on-Wye, Llandovery, Llandeilo, Merthyr Tydfil, Pontneddfechan* and Talgarth* also carry information about the Park.

*seasonal service

At present, there appears to be no consistent approach to presenting information about walking as an activity. The greatest exposure to information about walking opportunities is often the shelf/rack space devoted to the sale of commercial guides.

Visits and/or phone calls to a number of the NP Information Centres and Tourist Information Centres indicate that the information offered is patchy. The historic problem of poor co-ordination between the two services, even where they are co-located, is currently being addressed.

Currently, the National Park has no stock control system that monitors the distribution or sales of BBNP publications or commercial publications.

3.5.2. Walking Wales magazine

This magazine, published quarterly, has been run by the current company for two years. Distribution is around 4,000 and they claim that sales trends are good, with steady increases, and a healthy subscription base.

Its inclusion as post-arrival information reflects its distribution pattern within Wales. In North Wales the largest distributor is Tesco, whilst in South and Mid Wales it is a mixture of TICs and shops. Within the BBNP, its presence in TICs seems very patchy. There may be a bias in editorial and advertising towards North Wales.

3.5.3. Tourism enterprises distributing information

Many tourism enterprises play a valuable part in informing their visitors about walking opportunities within their accommodation: for instance, in our survey around 60% of respondents reported that they have OS maps available to borrow. However, they appear to be better at providing some types of information than others. The National Park 2004 Guided Walks and Events programme, for instance, was less widely available than local walks leaflets, yet staying visitors could be considered a prime target for these special opportunities. Self-catering accommodation operators are generally better at providing information to borrow or to look at than were enterprises as a whole. There are many tourism enterprises that prepare their own routes for their visitors to follow, although this was less common amongst self-catering operators than serviced accommodation. Many tourism enterprises also said that they have specific places to walk or particular walks that they regularly suggest to their guests.

4 TOURISM IN THE BRECON BEACONS NATIONAL PARK

4.1 The tourism resource - tourism enterprises in the BBNP

Initial information about tourism enterprises in the National Park area was provided by the TGA. This database was cleaned and Wales Tourist Board information was added. Finally, enterprises within the National Park Area were identified using postcode selection.

In total, over 500 tourism enterprises were identified in the NP Area, based on best data available at the time. However, information was not available on a consistent basis that would allow us to relate attribute data (enterprise size and type, quality grading etc.) to this list: this information is available for those enterprises that responded to a survey that was carried out in June/July 2004.

The main database was boosted with the co-operation of Brecon Beacons Holiday Cottages, who agreed to approach the owners of their c. 200 properties in the National Park area.

Map Ref 4.1 (see Appendix) shows the distribution of accommodation enterprises within the BBNP area: they are highly concentrated in the eastern end of the Park, especially in the Abergavenny/Brecon and Brecon/Hay corridors. Map Ref 4.1a and Map Ref 4.1b show respectively the distribution of serviced and self catering accommodation. Self-catering accommodation tends to be slightly more dispersed across the Park than serviced accommodation, and is often slightly further from main routes. Map Ref 4.1.c shows the distribution of activity based accommodation, which follows a similar pattern but is if anything more concentrated in the most popular areas. Finally, Map Ref 4.1d shows the distribution of other accommodation, which includes camping and caravanning sites, youth hostels and bunkhouse barns; these accommodation types appear relatively to be marginally more dispersed.

It was subsequently agreed that the food and drink sector was significantly under-represented in the database, and an additional c.500 enterprises were identified through a commercial listings service. These enterprises were also mapped, and Map Ref 4.1e shows the distribution to be a little different to that of accommodation enterprises, following broadly the same pattern in the east but with the addition of a clear band of places to eat and drink along the southern edge of the Park. These additional places to eat and drink were not included in the enterprise survey.

There are a number of award winning hotels, pubs and restaurants that offer the highest quality of comfort and care, and food of the highest standard. For instance, WDA's Dining Out in Wales 2004 publication includes ten places to eat around the Brecon Beacons amongst the 100 top places to eat in Wales.

Nevertheless, concern remains over consistency of quality across the Park. Certain sectors, such as self-catering accommodation and caravan sites, demonstrate strength in quality,. However, it is important to remember that quality issues are a concern within the Brecon Beacons for tourism as a whole, and cannot be tackled solely through walking tourism.

Forty enterprises in the BBNP promote themselves as welcoming walkers or cyclists, having completed the relevant WTB training. Eighteen enterprises in BBNP have signed up to the Green Dragon Standard and have made a commitment to offer eco-friendly accommodation.

Some accommodation sectors are well organised in the Park. The Association of Bunkhouse Operators represent 22 independent bunkhouses and camping barns in the BBNP area which together offer 440 beds. There are Youth Hostels at Llandeusant (26 beds), Ystradfellte (28 beds), Llwyn-y-Celyn (41 beds), Brecon (54 beds) and Capel-y-Ffin (38 beds) and this year YHA took over from BBNP the management of accommodation at Danywenallt, taking their total bedspaces in the Park to over 200.

A total of 121 enterprises responded to the survey of enterprises that was carried out as part of the development of this walking tourism strategy.

87% of respondents provide overnight accommodation, including 37 serviced accommodation enterprises, 49 self catering enterprises, 16 group accommodation facilities (bunkhouse barns and youth hostels), and 11 caravan and camping sites. The response from these various sectors can be taken as some indication of their interest in walking tourism.

4.2 Volume, value and performance of tourism in the BBNP

2003 STEAM data for the Brecon Beacons National Park Area suggests that just over 2m tourist days are spent in the Park, giving a total value of tourism of £72.6m, 6% up on 2002. However, while revenue is rising, it is outperforming gains in the total number of tourism visits: for instance, visitor numbers to serviced accommodation appear to have fallen by 10% between 2002 and 2003. Recent STEAM data seem to suggest that fewer people are staying in the area but that they are staying longer. This may be thought to be helpful to the long-term development of sustainable tourism in general and walking in particular.

Non-serviced accommodation is important to the Brecon Beacons National Park, generating more revenue than serviced accommodation (£21.1m; £17.0m), and substantially more tourist days (343,000; 194,000)¹².

The average stay in serviced accommodation is 1.78 days, and in non-serviced accommodation 6.60 days (calculated from 2003 figures). While seasonal variation is relatively small for serviced accommodation, length of stay in non-serviced accommodation appears to peak from April through October, with short breaks becoming important off-season.

Isolating further information about the performance of the tourism industry in the Brecon Beacons National Park is challenged by its division by many administrative boundaries. The Brecon Beacons National Park relates to a part of three of the four economic regions of Wales for which the Wales Tourist Board releases figures, the greatest overlap being with Mid Wales.

¹² Brecon Beacons National Park STEAM Report 2003

Unpublished weekend/weekday occupancy data for Powys, provided by Wales Tourist Board, suggests that room occupancy levels at weekends normally exceeds weekday occupancy by 3-10% for guesthouse/B&B accommodation, less for hotels. During holiday periods (April/May/August), this difference increases to 11-20%.

4.3 Value of walking tourism in the BBNP

Data is not available to reproduce at a Brecon Beacons level, the all-Wales calculation used in the Walking Tourism Strategy for Wales referred to in 1.2. However, it is possible to arrive at an estimate of the figure for the value of tourism in the Brecon Beacons National Park that can be attributed to walking.

We suggest two different ways of making a calculation.

The value of different categories of visits to Wales, which has been drawn from a number of different sources, is presented in Table 4.1 below.

Table 4.1 Value of different categories of visits to Wales, 2003

£m	All Wales	All Wales - Walking
UK staying visits	1766 ¹	908 ⁴
O/seas visits	269 ²	164 ⁵
Tourism day visits	1400 ³	112 ⁶
Total	3435	1184

Sources:

1 All trip spend United Kingdom Tourism Survey 2003

2 All trip spend International Passenger Survey 2003

3 Total expenditure on tourism day trips Great Britain Day Visits Survey 2002-03

4 Active Holidays in Wales, Wales Tourist Board 2004

5 61% of overseas visits to Wales involve walking – TNS Travel and Tourism

6 8% of all countryside tourism day visits in Wales have walking as the main activity – GBDVS 2002-03

Calculating from the above, the proportion of tourism spend associated with walking as an activity pursued can be calculated as a proportion of all Wales tourism spend as $\text{£}1184/\text{£}3435 = 0.34$.

Applying this to the STEAM figure for the economic impact of tourism in the Brecon Beacons National Park 2003, suggests that $(0.34 * \text{£}72.639\text{m}) = \text{£}25.04\text{m}$ can be attributed to walking.

An alternative figure can be derived from the proportion of countryside/village trips where walking (2+ miles) is an activity, which is given as 43%¹³.

If we assume that virtually all trips to the Brecon Beacons are classified as countryside/village, as opposed to seaside or city/town, then applying this to the STEAM figure for the economic impact of tourism in the Brecon Beacons National Park 2003, suggests that $(0.43 * \text{£}72.639\text{m}) = \text{£}31.23\text{m}$ can be attributed to walking.

We would therefore suggest that the annual value of walking tourism in the Brecon Beacons National Park will lie somewhere within the range $\text{£}25.04\text{m}$ to $\text{£}31.23\text{m}$, and that $\text{£}28\text{m}$ might represent a reasonable working figure.

¹³ Tourism in Wales 2003 by Location, Wales Tourist Board

4.4 Key features of visits to the Brecon Beacons National Park

The most recent survey of visitors to National Parks in England and Wales was carried out in 1994¹⁴. In the absence of more recent information, this gives the best picture available and suggests the following key features of visits to the Brecon Beacons National Park:

- Within the family of National Parks, the pattern of visits to the Brecon Beacons is quite extreme.
- In 1994 the Brecon Beacons was the third least visited of all the National Parks – 3,622,000 visitor days – with only Exmoor and Northumberland lower.
- 53% of all visitor days to the Brecon Beacons were made by day visitors: this was 2nd only to the Peak District.
- It has the second largest catchment population, after the Yorkshire Dales – in 1994, 1,969,000 people lived within 20 miles (32km) of the Park boundary.
- 44% of holiday visitors were on their first visit to the Brecon Beacons – second only to Northumberland.
- 17% of all visitor days to the Brecon Beacons were made by holiday visitors staying inside the Park, the third lowest, with only Northumberland and Dartmoor lower.
- The origin of visitors on holiday to the Brecon Beacons included:
 - 23% from South East England
 - 15% from South West England
 - 13% from overseas

4.5 Branding and promotion

4.5.1. The Brecon Beacons National Park within Wales

The Brecon Beacons is included as part of the promotion of a number of different destination marketing areas within Wales. Wales is divided into twelve distinct holiday areas, each with its own brochure, of which The Valleys of South Wales; Wye Valley and Vale of Usk; Carmarthenshire; and Mid Wales and the Brecon Beacons each include parts of the Brecon Beacons National Park. Three regional tourism partnerships, Tourism Partnership Mid Wales, South West Wales Tourism Partnership and Capital Region Tourism, are responsible for the development and marketing of mid, south-west and south-east Wales respectively. Made up equally of private and public sector membership, their principle role is to lead the implementation of regional tourism strategies that seek to improve the competitive performance of tourism so that it makes a better contribution to the economic and social prosperity of Wales. In partnership with the Wales Tourist Board, local authorities, tourism businesses and with other organisations, they undertake a range of marketing, product investment and business support activities on behalf of the tourism industry. In 2002, the National Park Authority established a Strategic

¹⁴ National Parks Visitor Survey 1994

Tourism Partnership whose membership includes the three regional tourism partnerships and nine local authorities.

4.5.2. Partner activity

Although recognising the importance of walking tourism, most of the potential RTP and local authority partners are not themselves giving walking high attention within their promotional activity, focusing instead either on general campaigns with larger markets or on niche products, such as golf and fishing, which are regarded as having more potential for their area as a whole, with competitive advantage and perceived higher value.

With limited budgets, consortia are seen as an important vehicle for promotional activity: this focus has served to move interest even further from the National Park.

Where walking is promoted, activity tends to have been geared around the promotion of longer distance routes. An example of this is *'Walking in Mid-Wales and the Brecon Beacons – Accommodation Guide'*, produced by Powys CC. There is no real coverage of the Brecon Beacons, so the title is somewhat misleading. Accommodation is covered in relation to six walking routes in Powys: Ann Griffiths Walk, Glyndwr's Way, Kerry Ridgeway, Pererindod Malangell, Severn Way and the Wye Valley Walk. There is no mention of Offa's Dyke Path. The Wye Valley Walk does touch on the NP at Hay-on-Wye, and six accommodation establishments in the vicinity are included.

Walking is featured in Capital Region's overseas publication, Southern Wales and in their travel trade publication. Capital Region is currently developing an active/relaxing proposition, where the 'soft' walking that Monmouthshire focus on may find a place. Caught between the two, BBNP may find that this could conveniently also match with Tourism Partnership Mid Wales' focus of healthy lifestyle.

Most local authorities identified the lack of packaging of the walking product as a constraint on its promotion.

4.5.3. WTB Walking Wales Campaign

As one of a number of activity holiday sectoral campaigns, Wales Tourist Board runs a 'Walking Wales' campaign. The campaign has focused on the more recreational short distance walker: families, couples and those for whom walking is a part of their holiday.

The aim of the campaign has been to generate requests for the Walking Wales magazine, drive people to www.walking.visitwales.com and to generate enquiries and ultimately bookings.

Specific tools have included:

- Walking Wales, a 52pp magazine, which has focused on centre based walking, guided walks and point to point walking along Wales' three national trails.
- Quarter page ads in Country Walking and Rambler magazine.
- Walking Wales inserts placed in magazines.
- Direct mail to warm and cold lists, including requests for regional information, such as 'Mid Wales and the Brecon Beacons National Park'.

- The website www.walking.visitwales.com, covering similar product to the magazine.
- Banners and Pop up placed on popular third party sites

Wales Tourist Board's campaign generated 32,193 requests in 2003 for the Walking Wales magazine, and 33,342 requests in 2004.

A three-year campaign programme is currently being devised for each of the walking, cycling and adventure products. Brecon Beacons National Park have previously bought into the Walking Wales campaign, although at present they have limited relevant product and no dedicated print to fulfil enquiries.

The walking campaign will still tackle the softer end of the market, but may include more hillwalking in the 2006 edition. WTB also plan to aim at younger audiences.

Results from conversion research carried out in summer 2004 are included in section 5.6.

4.5.4. ANPA Branding

The Association of National Park Authorities is working to develop a brand for the whole family of UK National Parks. The most likely choice will be "Breathing Spaces". The brand matches well with the BBNP walking product and this walking tourism strategy should seek to reflect its main messages.

5 THE WALKING TOURISM MARKET

5.1 The UK walking tourism market

- Walking holidays are the most popular activity holiday amongst UK holiday-makers. They account for around 5% of all holiday trips.
- 5.1m walking holidays were taken in the UK in 2002, generating £868m.
- A recent Mintel report¹⁵ showed that 26% percent of UK holiday-makers have taken, or would be interested in going on, a walking / rambling / hiking holiday.
- Walking is also the most popular activity undertaken whilst on holiday in the UK. 24% of trips in the UK included walking of more than 2 miles as part of the holiday¹⁶. Four out of five holiday-makers have engaged in holiday walking in the last three years.

5.2 The market for walking in Wales

- 74% of UK holiday trips to Wales involve walking as a main or important part of the holiday¹⁷. 5% of UK holiday trips to Wales have walking as the main purpose.
- There are a number of estimates of the value of walking tourism in Wales. The most widely quoted figure is derived from UKTS,¹⁸ which puts the value of the market at £550m.
- Using the UKTS figures, and comparing them with other activities, we can see that walking is the most valuable type of activity holiday / holiday activity in Wales, accounting for over 50% of the value of the activity holiday market.

Table 5.1 Value of activity holidays in Wales, 2000

Activity	Value (£m)
Walking	550
Watersports	160
Adventure	133
Cycling	103
Fishing	76
Horse-riding	18
Total	1,040

Source: Countryside Experiences, Wales Tourist Board 2004

¹⁵ Activity Holidays (UK), Sept 2003, MINTEL

¹⁶ UKTS

¹⁷ UKTS

¹⁸ Best Foot Forward – A walking strategy for Wales, Wales Tourist Board 2002

Table 5.2 looks in more detail at the value of the various segments within the walking tourism market in Wales.

Table 5.2 Value of Walking Tourism in Wales

Activity	Value (£m)	%
UK Walking Holidays	76.9	14%
UK Holiday Walking	404.6	74%
Overseas Holiday Walking and Walking Holidays	38.9	7%
Walking Day Visits	27.8	5%
Total	548.2	100%

Source: Best Foot Forward: A Walking Tourism Strategy for Wales 2002 – 2010, Wales Tourist Board, May 2002.

We can see that the market with the largest value is those who are looking to walk as one of the activities they do whilst on holiday: the value of dedicated walking holidays is much smaller.

5.3 Walking within National Parks

Some information may be gained from looking at the scale of participation in walking amongst visitors to National Parks in the UK. A survey undertaken in 1994 by the former Countryside Commission and Countryside Council for Wales showed the following levels of participation in walking in National Parks¹⁹.

Table 5.3 Extent of participation in walking by National Park Visitors (UK)

Activity	Type of visitor			
	Day trip	Holiday visitors staying inside Park	Holiday visitors staying outside Park	All visitors
Walking (less than 1 hour)	37%	48%	54%	45%
Walking (1 – 4 hours)	31%	57%	41%	43%

Source: Visitors to National Parks, Countryside Commission / Countryside Council for Wales, 1994. Respondents could offer multiple answers.

As the table shows, almost half of all visitors were undertaking at least one walk. Walks of an hour or less were taken by 45% of visitors, whilst slightly fewer (43%) included a walk of between one and four hours in their visit. Holidaymakers staying inside a National Park were more likely to walk for longer (1-4 hours).

Walking is also important as a motivator of visits to National Parks. The same survey showed that walking was the most important single reason for a visit (40%). Amongst holiday visitors, nearly one third (31%) were on moderately active holidays that included short walks, with a further 17% on active holidays involving hill/fell walking.

¹⁹ All Parks Visitor Survey 1994

5.4 Walking within the Brecon Beacons National Park

Within the Brecon Beacons National Park, walking may be slightly more popular than for National Parks as a whole. For instance, research in 2003²⁰ showed that 47% of visitors to the Park walk or intend to walk during their visit.

However, the research²¹ also provides some evidence that Brecon Beacons may attract less people for whom walking is the primary motivator of visits, identifying that just 18% of visits are stimulated by walking. This is less than half the 40% who in 1994 fell into that category for National Parks as a whole. This suggests that within the BBNP, incidental walkers (those for whom walking is not the main motivator of a visit) may be especially important. However, the local research was designed for a different purpose and its sampling techniques may have introduced some bias into the results: they should be used with care.

5.5 Walking day visits in Wales

Walking, defined as walking over 2 miles (3.2km), is by far the most popular physical activity for residents in Wales. Research conducted by the Sports Council for Wales (SCW) in 2000/01²² showed that one third of all adults claim to have participated in walking within the previous four weeks. The next most popular activity is swimming, at 12.3%.

Participation rates in walking are gender neutral, and levels increase with age up to the age of 65.

Participation rate in walking (2+ miles)

	%
15-24	28.2
25-34	31.6
35-44	35.0
45-54	37.6
55-64	39.3
65+	29.8

Social class is a key discriminator of participation in all sports and physical activity, and the gap between AB and C1 is at its widest for walking.

Across Wales, the Valleys SCW Region offers the greatest scope for the promotion of a more active lifestyle through increased walking. The region, which includes Blaenau Gwent, Merthyr Tydfil, Torfaen, Neath Port Talbot, Rhondda Cynon Taff, and Caerphilly (all partner authorities of the BBNPA), has the lowest levels of participation in any sporting activity, at 45%. Differences are particularly acute in measures that include walking.

The Great Britain Day Visits Survey²³ found that:

20 BBNP Visitor Information and Interpretation Research, BBNP, Jan 2004.

21 Ibid.

22 Adult Sports Participation and Club Membership in Wales 2000/01, Sports Council for Wales 2001

23 2002/03 Great Britain Day Visits Survey, Countryside Agency 2004

- Across the UK, 'walking/hillwalking and rambling' is the most frequent main activity for leisure day visits to the countryside. 32% of such visits have walking as the main activity, with going out for a meal in second place at just 15%.
- However, when longer day trips are considered, walking becomes much less important as a component. 'Walking/hillwalking and rambling' was the main activity of just 8% of tourism leisure day visits to the countryside²⁴, the fourth largest category, after 'eating and drinking', 'visiting a leisure attraction', and 'visiting friends and relatives'. In England, visits to rural attractions were found to have increased by 6% in 2003.²⁵ Visits to formal attractions appear to be displacing some walking day visit activity.
- 20% of adults in Wales had visited the countryside during the previous 2 weeks (65% within the last year).
- 35% of adults in Wales claimed to have visited a National Park over the previous 12 months (33% actually to a NP).

5.6 Characteristics of walkers and walking visits

Little is known about the characteristics of walkers in general and the kind of walking that they enjoy, but information is available about two categories of those who have an interest in walking: those requesting the Walking Wales magazine from Wales Tourist Board, and readers of Country Walking magazine. The Brecon Beacons National Park has a potential fit with the interests of both these categories of walkers.

However, it is important to bear in mind that these are subsets of a wider group of walkers. Research conducted for the Wales Tourist Board²⁶ concluded that "there was a bias in respondents to the Walking Wales campaign, and it is likely that they form only one of a number of different walking segments that Wales attracts."

Respondents to Walking Wales campaign

Research in 2002²⁷ found that people requesting the Walking Wales brochure were generally:

- From older (55+) age groups
- On holiday with their partner
- Doing easy country and coastal walks and circular walks
- Walking 5 miles (8km) or less a day when on holiday
- Booking independently and taking centre based holidays.

More recently, WTB follow up research²⁸ on those requesting the Walking Wales magazine between May 2003 and May 2004 has looked more closely at comparisons with those responding to the general UK campaign. In general:

- Those requesting the walking magazine are more highly concentrated in the 45-64 age group
- Of these, those aged 55-64 are more likely to take a walking holiday

²⁴ Tourism Leisure Day Visits are defined as trips lasting 3 hours or more, not taken on a regular basis.

²⁵ Visitor Attractions Trends England 2003

²⁶ Best Foot Forward, Appendix 3 – Walking Wales Brochure – Telephone Survey of Brochure Recipients

²⁷ *ibid*

²⁸ Walking Wales Campaign Evaluation 2003/04, Beaufort Research

- ABC1s (66%) are more strongly represented amongst those requesting the Walking Wales magazine
- Affluent empty nesters (22%) and older families (15%) are more strongly represented amongst those requesting the Walking Wales magazine than amongst those responding to the general campaign (15%, 9%): low income, no family (22%) and affluent retired (17%) are also important segments for walking requests.
- The research confirms the importance of couples, accounting for 50% of those taking walking holidays
- There is very little difference in length of stay between those taking a walking holiday (mean 5.2 days) and those taking any holiday as a result of the main UK campaign (mean 5.5 days)
- Those taking walking holidays are most likely to use guesthouse/B&B accommodation (29%) and self-catering accommodation (26%). Hotel/motel accommodation is more likely to be used by general holiday visitors to Wales.
- The low income/no family segment are likely to have taken the most walking holidays in Wales in the last five years (mean 10.2). They are closely followed by the affluent retired (9.3) and affluent working empty nesters (8.7).
- Although only a small number of young professionals requested the Walking Wales brochure, those that did were likely to have taken a walking holiday or holidays in Wales, an average of 8.0 such holidays in the last 5 years.
- Requests for the Walking Wales brochure generated small numbers of day trips as well as staying visits: the mountain biking campaign generated over four times as many day visits as the walking campaign.

Country Walking Magazine

Additional insights into the characteristics of walkers can be gleaned from analysis of the readership of walking magazines. *Country Walking* magazine has a circulation of over 47,500 and more than 100,000 readers. In a recent readers' survey, the majority categorised themselves as 'serious walkers'. The survey found that:

- On average, *Country Walking* readers have been on 2.82 walking weekends and 1.7 walking holidays in the last 12 months.
- The average distance they usually cover on a walk is 8 miles (13km).
- The most popular types of walking are forest/woodland walking (84% of readers participated), coastal walking (80%) and hill/fell walking (73%).
- 73% of readers state "enjoying the great outdoors" as the most important reason to go walking, followed by "health/fitness" and "bird watching/nature".
- The average age of the *Country Walking* reader is 52.
- Overall, the reader split is 78.8%ABC1 and 21.2% C2DE. Nationally, 50% of the UK population are ABC1.
- Whilst readers were on a holiday or weekend away, the majority stayed in either a B&B or a self-catering cottage/flat (36% for each category). The next two highest categories were hotels with 28% and tents with 18%.

Countryside Experiences in Wales

Recent research²⁹ suggests that the majority of visitors to the countryside are thought to spend at least half their time engaged in activities other than walking. 'Strollers', (who may take the odd stroll but the majority of their time is spent doing less active things such as visiting places of interest, looking round towns and villages etc) may account for more than half (55%) of the market for visits to the countryside. A further 15% of the market is in the 'Light Actives' segment (spend some time doing physical outdoor activity but equal, if not more time doing other things (e.g. visiting places of interest, shopping etc).

These results suggest that the wider product offering within the BBNP may be just as important as the facilities that relate directly to walking.

5.7 Spend per head

Traditionally, walking tourists have been considered as low spenders, but the available evidence suggests a more complex picture. Spending may vary across segments, for example:

- A survey of hillwalkers in Scotland³⁰ found that spend per person per day averaged £34. This was slightly less than per day spending for all visitors. However, they were likely to stay for two days longer.
- Walking holiday visitors to Wales spend an average per night of £36.60, compared to £30.40 for all holiday visitors³¹.
- Research for Wales Tourist Board³² found that total average expenditure on walking and related activities (such as buying equipment/kit) was £126.85 for each walking trip (excluding travel, accommodation and meals).
- Walkers on Pembrokeshire Coast Path were found to have spent an average of £15.80 per day³³.
- Holiday walkers spend just as much as other holiday visitors to Wales³⁴.

The figures suggest that those engaged in walking whilst on holiday may have a higher overall daily spending than holiday-makers in general, whilst those on walking holidays may have slightly lower levels of daily spend than all holiday-makers.

5.8 Future trends

Walking Tourism is expected to grow by an average of 3.5% per year until 2010. This growth rate may be lower than that for some other activity sectors, but walking will still account for almost 50% of the value of the activity holiday market. The value of the walking tourism market is projected to be £700m in 2010, over three times the value of watersports, the next most valuable activity holiday market. This is shown in Table 5.4.

29 Countryside Experiences, Wales Tourist Board 2004

30 'An Assessment of Outdoor Activities in the UK and their Potential Impact on Scottish Tourism', VisitScotland, 2000

31 Best Foot Forward – a Walking Strategy for Wales, Wales Tourist Board 2002

32 Walking Wales Campaign Evaluation 2003/04, Beaufort Research

33 Economic Impact of Walking in Rural Wales, Ramblers Association Wales, March 2000

34 *ibid*

Table 5.4 Activity Tourism Growth in Wales 2000 - 2010

Activity	Current value (£m)	2010 Potential Value (£m)	Cumulative Growth	Annual Growth
Walking	550	700	27	3.5%
Watersports	160	225	40	5%
Adventure	133	220	65	7.4%
Cycling	103	172	67	7.6%
Fishing	76	115	51	6%
Horse-riding	18	27	50	6%
Total	1,040	1,459	40%	5%

Source: *Countryside Experiences, Wales Tourist Board 2004*

The following trends are also likely to stimulate growth in walking activities:

- **The growth in the number of those over 55**, who are increasingly active and healthy and have time and money available. This group is already well disposed to walking. Similarly, the 45-54 year old age bracket is also increasing in size and well disposed to walking, including serious walking. Walking holidays are generally not sought by families with children, a life cycle group which is diminishing in size.
- **The increasing stress of urban life and the growing interest in health, fitness and improving activities.** There is growing medical evidence and general awareness that walking is an ideal form of exercise and promotes good health.
- **A growing awareness of environmental issues.** Walking is seen as a 'green' activity, compatible with the conservation of the countryside.
- **The changing image of walking**, illustrated by the movement of walking and outdoor gear into the High Street.

5.9 The walking activity of current visitors to the Brecon Beacons

The following results are based on analysis of the responses from 121 tourism enterprises who responded to the survey that was carried out as part of the development of this walking tourism strategy.

5.9.1. The current visitor market

The responses give us a rough and ready indication of how tourism enterprises perceive the make up of their current visitor market.

About 40% of visitors are thought to be visiting the Park for the first time, with a further 34% having visited on a previous occasion, and around 26% making regular/frequent visits.

In total, just over half (51%) of all visitors are couples. The largest group of visitors are older (45+) couples. Younger (25 – 44) couples are less important: for self-catering accommodation they are half as important.

The group visit market amounts to 24% of all visitors, with younger (25-44) groups of friends being a little more important than older (45+) groups of friends.

Overall, the family market amounts to 23% of all visitors, combining families with young (<11) children (13%) and older (11+) children (8%). For self-catering, the family market is as important as the older couples market. Brecon Beacons Holiday Cottages respondents report that the family market is especially important: families with young children may represent 21% of their visitors, with families with older children adding a further 13%.

For most enterprises, weekend short breaks are an important part of the market, perhaps 45% of visits fall into this category. Mid-week breaks and stays of 4-6 nights are considerably less important.

For most accommodation, stays of one week or more are a small part of the market (13%). Weekend breaks make an important contribution even to the self-catering market, with 26% of visits being stays of 1-3 nights at a weekend. BBHC owners report that 55% of their visitors are staying one week or more.

About one third of visitors are reported as coming from London and the South East, certainly the most important area of origin. Other important areas include Southern and South West regions, and the West Midlands. 11% of visitors to all enterprises are from overseas, reducing to about 8% for self-catering accommodation.

5.9.2. The current importance of walking

Enterprises see “opportunities for walking in the countryside” as being of greater importance in attracting their visitors to the Brecon Beacons than the fact that they are located in a National Park, or that there are opportunities for active outdoor recreation in general. All three factors are, however, important.

Enterprises were asked to say in what ways walking played a part in their customers’ visits to the Brecon Beacons. The response indicates that there is a range of ways in which walking plays a part.

Visitors with walking as the main purpose of their visit to the Brecon Beacons were felt to form the largest group amongst customers, followed by those who ‘go for occasional longer walks (over 1 hour)’. For self-catering, the picture was a little different. Here it was felt that more visitors can be described as ‘going for a short walk most days, and an occasional longer walk’, followed by those who ‘go for occasional longer (over 1 hour) walks’. Visitors with walking as the main purpose of their visit are the third most important group for self-catering accommodation. In both cases, visitors who simply ‘go for occasional short (under 1 hour) walks’ were the least important group.

When questioned about the kind of walking experience that appeals to their customers, enterprises ranked ‘rolling hills and open ridges’ first, followed by ‘an upland experience, including popular summits’. The next category was ‘gentle terrain following paths through farmland and villages’.

The least interest was expressed in the two extremes of walking experience: 'a rugged upland experience, wild and remote' and in 'managed countryside sites (forests, nature reserves etc.)'.

5.10 Summary

The following observations summarise our findings:

- The importance of walking in attracting visitors to the Brecon Beacons National Park is well recognised amongst tourism enterprises.
- Walking in general is significant to all ages and lifecycle groups, appealing to young and old alike.
- Walking is relatively up-market with two thirds from ABC1 socio-economic groups.
- Holidays associated with walking appeal particularly to those aged 45-64
- Holidays associated with walking appeal particularly to couples
- Important segments for holidays associated with walking in Wales are affluent retired, affluent working empty nesters, low income/no family.
- Young professionals may also offer good prospects.
- UK holiday walking and walking holiday visitors to Wales as a whole come primarily from the same regions as all domestic holiday visitors (i.e. Wales, North West England, West Midlands and London and the South East).
- Walking day visitors to Wales come mainly from within Wales and parts of neighbouring English regions.
- There is very little difference in length of stay between those taking a walking holiday and those taking any holiday as a result of the main UK campaign in Wales.
- Walking (more than 2 miles (3.2km)) is marginally more important amongst long holiday takers (37% participate) than short holiday takers (22%), both as an activity and as a purpose of visit³⁵.
- Most walking holidays are DIY holidays, where people have arranged their own accommodation, planned their own routes and made their own travel arrangements. These walking holidays are fairly equally spread across long walking holidays and short breaks.
- Packaged walking holidays appeal primarily to singles or couples and are most popular with the 45 – 54 age group.
- Walking holidays are slightly less seasonal than general holidays, and particularly popular in June and September.
- There is a need to align the presentation of the walking product of the Brecon Beacons National Park with the identified interests of those who wish to make visits there that are associated with walking.

³⁵ UKTS

6 SEGMENTING THE MARKET

The potential walking tourism market has been seen as large and diverse. We now wish to identify the particular parts of this diverse market on which we believe the Brecon Beacons should concentrate.

6.1 Walking tourism segmentation

The Brecon Beacons National Park offers a wide range of walking opportunities amongst a number of landscape settings. With the exception of the coastal experience, which is not represented, it is possible to consider walking tourism segments within the National Park in the same way as they have been considered at a national, all Wales level. Table 6.1 outlines the market segmentation put forward in the Wales Walking Tourism Strategy.

Table 6.1 Segmentation of the Walking Tourism Market

Main Segment	Sub-segments	Description
Holiday Walking	Primary Holiday Walkers	People for whom walking is an important part of holiday, but not the main holiday purpose
	Incidental Holiday Walkers	People who will go for occasional short walks while on holiday, but very much as an incidental holiday activity that is not necessarily a factor in destination choice
Walking Holidays	Independent centre-based walking holidays and break-takers	People basing themselves in one location for a holiday or break that they organise themselves, which is entirely or primarily focused on walking
	Independent point to point walking holidays and breaks	People on self-organised walking holidays and breaks that involve stopping at different places each night along a long distance walking route
	Independent hill walking breaks	People taking high-level or mountain walking breaks that they plan and organise themselves
	Long distance walkers	Walkers on self-organised walking holidays on long distance paths and walking routes
	Group walking holidays and breaks	Ramblers and other walking groups and clubs going away as a group
	Packaged walking holidays and breaks	People buying a packaged walking holiday or break from a walking holiday operator
Walking Day Visits	Primary Walking Day Visitors	Day visitors whose main visit activity is walking
	Group Walking Day Visits	Ramblers and other walking groups and clubs going out for a day's walking in an area
	Incidental Day Visit Walkers	Day visitors who will include a short walk as part of a day out, but for whom walking will not be their main purpose of visit.

Source: *Best Foot Forward: A Walking Tourism Strategy for Wales 2002 – 2010*, Wales Tourist Board, May 2002.

Three main market segments are subdivided into a further eleven smaller sub-segments, based on a mixture of different variables, including type of walk (e.g. long distance walkers), the part walking plays in destination choice (i.e. incidental and primary) and booking characteristics (i.e. groups / individuals; independent/ packaged).

Accepting its limitations, it would seem appropriate to base the targeting of this strategy on the segmentation method used in the WTB Walking Tourism Strategy. In addition to Wales Tourist Board themselves, the area's Regional Tourism Partnerships and some local authorities currently use or refer to this segmentation.

6.2 Segment profiles

We now look in turn at what is known about each of the segments used in the Wales Tourist Board Walking Tourism Strategy. This information is largely gleaned from the strategy document³⁶, and was largely informed by telephone interviews with those requesting the Wales Tourist Board Walking Wales magazine. Although these interviewees represent just one subset of all of those with experience and interest in walking, they are especially important for they are the ones that wish to be reached and are open to influence.

At this stage we have given no special consideration to the overseas market, as the National Park Authority requested first consideration to be given to the domestic UK market.

Best Foot Forward attaches the label "**Independent**" to a number of these segments, by which it means those who make their own holiday arrangements, as opposed to those who purchase holidays through a commercial operator. Use of the word does not necessarily imply the independently minded walker who is at home in the hills and able to make their own decisions about their walking activity. To avoid confusion, we have retained the WTB wording. However, it is extremely important to bear this distinction in mind.

6.2.1. Holiday Walking

These two segments consist of people for whom walking is an important part of a holiday but not their main holiday purpose.

Primary Holiday Walkers

For primary holiday walkers, walking plays a part in the holiday destination choice.

Who are they?

- Two distinct types:
 - Holiday walking couples (HWC) – all ages but bias towards older age groups
 - Family holiday walkers (FHW) – a smaller segment
 - Both are ABC1

Volume

- The primary holiday walking segment is sizeable – estimates suggest that it accounts for 30% of all holiday trips to Wales.

³⁶ Best Foot Forward - A Walking Tourism Strategy for Wales, Wales Tourist Board 2002

Walking interest

- Holiday Walking Couples are looking for easy country and coastal walks of around 4-6 miles (6.5 –10km) across fairly gentle terrain. Keener walkers will walk longer distances. Not interested in hill walking.
- Family Holiday Walkers are looking primarily for short easy walks of up to 4 miles (6.5km), with things for children of all ages to see and do along the way. Walks linked to water are particularly popular.
- Circular walks are particularly popular. Linear walks will also be undertaken.

Accommodation interest

HWC – B&Bs, self-catering, small hotels or inns

FHW – self-catering, camping and caravanning

Length of stay

HWC – primarily short breaks, especially weekend

FHW – One week +

Ease of influence

Information obtained or borrowed once arrived. HWC can be reached through magazines and destination marketing activity. HWC have low propensity for repeat visits. FHW seasonal market, largely constrained by school holidays. Their primary requirements for holiday information are for general information about an area, accommodation information, and information on family attractions and activities; FHW will be attracted by destinations that clearly offer good family walking opportunities with clear differentiation for children of different ages.

Incidental Holiday Walkers

Incidental holiday walkers are 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.

Who are they?

- The segment covers all ages, socio-economic groups and life-stage groups.

Volume

- Incidental holiday walkers are a large and diverse market segment accounting for up to 40% of all holiday visitors to Wales.

Walking interest

- 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 such as waterfalls, lakes or viewpoints.

Accommodation interest

- All

Length of stay

- Any

Ease of influence

- Incidental holiday walkers are unlikely to consider walks information prior to reaching their destination. Information on walks is most likely to be obtained from TICs or accommodation establishments.

6.2.2. Walking Holidays

Walking holidays are holidays and short breaks where walking is the main purpose of the holiday. The walking holiday market is a much smaller market than holiday walking. It currently accounts for some 500,000 holiday trips to Wales, around 5% of all holiday trips to Wales.

Independent centre-based walking holidays and break-takers

Who are they?

- Predominantly couples of all ages, ABC1

Volume

- This is by far the largest segment of the walking holiday market – 92% are centre based.

Walking interest

- In general, members of this segment are looking for easy country and coastal walks of varying lengths, but most commonly around 5-7 miles (8-11km). Keener walkers are interested in walking longer distances and in hill walking. Families are more likely to walk shorter distances. This segment is primarily looking for circular walks, but will also do linear walks along a landscape feature e.g. a stretch of coastline or a river, or along a stretch of a National Trail or waymarked regional route.

Accommodation interest

- Couples tend to use accommodation in B&Bs, small hotels, inns, and self-catering. Families will tend to stay primarily in self-catering accommodation.

Length of stay

- These holidays tend to be short breaks

Ease of influence

- OS maps and walks guidebooks tend to be obtained in advance. Local walks leaflets are obtained primarily at the destination. They appreciate being able to borrow walks books and leaflets from accommodation establishments. Keener walkers will usually plan their own walks using OS maps, possibly only using published walks material for ideas on where to walk. Can be reached through magazines. High propensity for repeat visits.

Additional comment

- Signposting and waymarking is of importance to the majority of walking holiday takers, irrespective of experience. They also have some interest in guided walks. Keener walkers are more likely to be interested in guided walks as a means of getting the most out of an area.

Independent Point-to-Point Walking Holiday and Break Takers

Who are they?

- Predominantly couples or small groups of friends. Assumed younger profile.

Volume

- A much smaller market than the centre-based market (just 8% of walking holidays)

Walking interest

- More likely to be keener walkers who will walk reasonably long distances each day. This segment frequently uses sections of National Trails or waymarked regional walking routes. Members may do circular day walks off the main route.

Accommodation interest

- Tend to use B&Bs, guesthouses and small hotels. They are also users of youth hostels.

Length of stay

- This group are looking for short breaks

Ease of influence

- This is a largely independent and well-informed market segment that plan their own holidays. They are less likely to be influenced by Tourist Board and unitary authority tourism marketing activity.
- Like to read specialist walking and outdoor magazines.
- Primary requirements for holiday information are for information on long distance routes, and accompanying accommodation information for routes.
- Possibly more disposed to accessing information via the Internet.

Additional comment

- Likely to be more positively disposed to using public transport than other segments.

Independent Hill Walking Break Takers

Who are they?

- The segment is primarily made-up of small groups of friends aged 16-34, both mixed and male-only groups. Socialising is an important part of the holiday.

Volume

- No information to gauge this.

Walking interest

- This segment is looking for all-action walking experiences in wild and challenging terrain. Challenge and a sense of achievement are important for them. They look for circular hill walking routes of 8-15 miles (13-24km) and also more challenging stretches of National Trails or long distance walks.

Accommodation interest

- Primarily centre-based. The main opportunities focus on weekend breaks and self-organised holidays using youth hostels, bunkhouses, camping and other forms of basic accommodation, particularly those where a pub is at hand.
- There is also some local evidence³⁷ that this segment may be using larger self-catering properties.

Length of stay

- Primarily weekend breaks

Ease of influence

- Self-organised – reject organised holidays. Likely to try different locations and activities: a downside of this market is that it has a low propensity for repeat visits. Will access information from the internet.

Additional comments

- Looking for clearly waymarked routes
- Also interested in other adventure activities.
- May be open to using public transport.
- Felt likely by Best Foot Forward to be an important segment for the Brecon Beacons and Snowdonia

³⁷ Brecon Beacons Holiday Cottages report demand for larger properties.

Long Distance Walkers

Who are they?

- Split between older long distance walkers and a youth market on backpacking holidays.

Volume

- A very small market segment

Walking interest

- Keen and experienced walkers. Walking on National Trails, waymarked regional walking routes, and long distance paths promoted by Ramblers Association and other walkers groups and individuals.

Accommodation interest

- Older long distance walkers are more likely to use B&Bs, guesthouses, inns and youth hostels.
- The youth market opt more for camping, camping barns or youth hostels.

Ease of influence

A highly independent self-organised segment they are unlikely to be influenced by Tourist Board or unitary authority tourism marketing activity, but more so by the Ramblers Association and the Long Distance Walkers Association.

Group Walking Break Takers

Who are they?

- Ramblers and other walking groups

Volume

- Organised groups represents a very small market segment.

Walking interest

- They tend to visit less well-known areas, and avoid honeypot destinations. They do fairly long walks each day – averaging around 10 miles (16km).

Accommodation interest

- The market is usually centre-based although a minority of groups may do point-to-point breaks. Accommodation preference is for small hotels – may also use self-catering accommodation or youth hostels.

Length of stay

- Primarily weekend

Ease of influence

Will plan own walks using OS maps – may use published walks leaflets and guidebooks for ideas for walks.

Packaged Walking Holiday Takers

Who are they?

- A diverse market segment covering a wide range of age groups and party types. Primarily couples, small groups of friends, singles. Predominantly 35+. There appear to be two distinct types of packaged walking holiday taker: inexperienced walkers looking for the security of an organised walking holiday, and experienced walking enthusiasts using the services of a walking holiday operator to help them get the most out of an area. Latter primarily older people (aged 55+), looking primarily for point-to-point walking holidays. Hill walking breaks have stronger appeal to younger age groups.

Volume

- A small but growing market segment, currently accounting for around 4% of walking holidays to Wales.

Walking interest

- Demand appears to be evenly divided between self-guided and guided holidays, and between centre-based and point-to-point holidays.

Accommodation interest

- Mainly use B&Bs, guesthouses, inns, and small hotels.

Ease of influence

- Small home-based walking holiday operators will largely plan their own routes: they are unlikely to use published walks material. Larger operators tend to favour well known, named routes, including National Trails.

Additional comments

- The social aspect of being on an organised walking holiday is important for many people, particularly singles.

6.2.3. Walking Day Visits

In terms of volume, walking day visits (involving day trips of 3 hours or more away from home) are the most significant element of walking tourism. However, currently they are much less significant in terms of value.

Primary Walking Day Visitors

Primary walking day visitors are day visitors for whom walking is their main visit activity.

Who are they?

- A very diverse market segment including all age, life stage and socio-economic groups and all levels of interest in walking. The most significant group are occasional to frequent recreational walkers, but keen walkers are also represented.

Volume

- This is a significant market segment estimated to account for over 2 million day visits to Wales each year.

Walking interest

- Occasional to frequent recreational walkers looking for walks of 4-6 miles (6.5-10km), primarily easy country and coastal walks. Keen walkers walk longer distances and in the hills. Circular walks are the most popular, but they are also interested in linear walks along a particular landscape feature or a stretch of a National Trail or regional walking route. A minority may join guided walks.

Accommodation interest

n/a

Length of stay

n/a

Ease of influence

- Day visitors from concentrations of population to the south and east of BBNP can be directly targeted.

Additional comments

- The majority will access walks by car but some may be interested in walks that are easily accessible by public transport.

Incidental Day Visit Walkers

Incidental day visit walkers are day visitors who will include a short walk as part of their day out, but for whom walking is not the main purpose of their visit.

Who are they?

- A diverse market including all age, life stage and socio-economic groups.

Volume

- This is a very large market segment, including at least 7 million day visitors to Wales each year. The value of the segment depends on the way spend is defined: walking-related spend is very low given the incidental nature of walking to their visit, but overall spend levels for the total visit are possibly higher than for primary day walkers.

Walking interest

- Most likely to be infrequent recreational walkers, not likely to be well equipped for walking or to have map reading skills. They are mainly interested in short easy walks along clearly defined and waymarked paths, possibly along or to a particular landscape feature. Walks are short, no more than 2-3 miles (3-5km), and often much less.

Accommodation interest

n/a

Length of stay

n/a

Ease of influence

- Incidental day walkers are people whose decision to visit is not influenced by the opportunity to walk. Instead, walking is an unplanned activity. Some may use easy to follow walks leaflets, although many will not use any published walks materials.

Group Walking Day Visitors

Who are they?

- Ramblers and other walking groups going out for the day on an organised group walk

Volume

- A small market segment

Walking interest

- Usually do circular walks of reasonable distance.

Accommodation interest

n/a

Ease of influence

- Will plan their own walks using OS maps. May use published walks literature for ideas and information. Groups tend to visit less well-known areas, and avoid honey-pot locations.

Additional comments

- The groups could be interested in using public transport, but guaranteeing transport for groups can be a concern if pre-booking is not available.

6.3 Evaluation of possible market segments

The profiles outlined in the previous section provide some initial insights into the segments which offer most scope for the Brecon Beacons National Park. However, a more systematic assessment will identify those that are most relevant to the BBNP.

In this section, we assess each of the market segments against a set of nine criteria, grouped under two main headings.

6.3.1. Assessment criteria

Attractiveness

The following criteria grouped together are designed to help form an opinion of the relative attractiveness of market segments outlined in the previous section.

- Market size: Some of the segments represent small niches whilst others are more mainstream, high volume markets. Niches will score lower on this measure than high volume markets
- Growth: This looks at the growth potential for each segment
- Product-fit: To what extent is the BBNP well suited to develop this segment based on the various facets of the walking product available. This includes the quality and nature of the walking, accommodation, transport requirements etc
- Seasonality: The extent to which the segment provides a tourism product that will generate visits away from the peak season
- Spend: This rating refers to an estimate of spend per head per day of each of the segments. These figures have been converted to a rating scale to allow comparison with other measures.
- Create new business: Segments that fill excess capacity or open up new markets within the Park will score higher than segments that do not.

Implementation challenge

There is also a need to take account of how easy (or otherwise) it would be to implement a strategy which targets a particular segment. The following criteria attempt to capture a measure of this.

- Competition: The extent to which there is extensive competition to attract the segment. Segments for which Brecon Beacons NP has a market advantage will score higher than segments for which Brecon Beacons is in competition with many other destinations. A rating of 1 would indicate many competitors, whilst 5 would reflect a market with fewer competitors
- Identifying & influencing markets: Some segments are known to be unlikely to be influenced by marketing methods. Instead, word of mouth

and past knowledge influence decisions where to go. Other segments are easier to identify and target using a range of marketing methods

- **Identifying partners & funders:** Segments that are shared as priorities for other potential partners will score higher than segments which are not, as here it is likely to be harder to find funding to develop or market product.

6.3.2. Segment assessment

Table 6.2 presents an analysis of the potential importance of each market segment to the future development of walking tourism in the Brecon Beacons National Park. Each segment is given a score for each of the nine criteria described in 6.3.1. The scores are based on an assessment of market commentaries contained within the Wales Tourist Board's walking tourism strategy³⁸. In the original document these assessments were based on pan-Wales attributes, but the scores given here have been derived from them to reflect the situation in the BBNP. Scores range from 1 to 5, with 1 being the lowest rating and 5 being the highest. The total unweighted score across all the criteria is then calculated.

Table 6.2 Segment Scoring Matrix

	Assessment Criteria									Total score
	Attractiveness						Difficulty in implementation			
	Market size	Growth	Product Fit	Seasonality	Spend	Create new business	Competition	Identify & influence markets	Identify partners /funding	
Holiday Walking										
Primary holiday walkers	4	3	4	3	3	4	2	3.5	4	30.5
Incidental holiday walkers	5	3	3	2	4	3	2	2	4	28
Walking Holidays										
Independent centre-based walking holiday and break takers	2	4	4	3	3.5	4	3	4	4	31.5
Independent point-to-point walking holiday and break takers	1	3	2	4	3	3	2	1	2	21
Independent hillwalking break takers	1	3	3	4	3	3	4	3	4	28
Long distance walkers	0.5	2	2	3	2.5	4	2	1	1	18
Group walking break takers	0.5	2	3	3	3	4	2	3	2	22.5
Packaged walking holidays takers	0.5	3.5	4	3	4	3	2	3.5	3	26.5
Walking Day Visits										
Primary walking day visitors	4	1	3.5	3	1.5	2	4	3.5	3	25.5
Group walking day visitors	2	1	3.5	4	1	3	4	3.5	2	24
Incidental day visit walkers	5	1	2	2	2	1	2	2	1	18

38 Best Foot Forward – Walking Tourism Strategy for Wales, Wales Tourist Board 2002

6.3.3. Summary of market segment priorities

Taking into account the scores for each segment contained in the matrix above, the segments have been prioritised under two broad headings: primary and secondary market segments. Primary market segments should be seen as management priorities for the period 2005 – 2010. Table 6.3 below presents a summary of the market segments to be targeted in this Walking Tourism Strategy.

Table 6.3 Summary of market segment priorities

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	

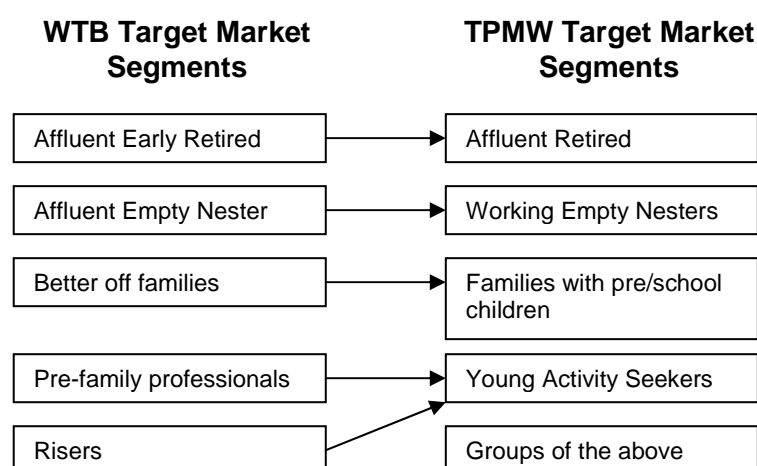
6.4 Relating the selected segments to partners' promotional activity

Segmentation of a market can be carried out using a wide variety of criteria or characteristics. Individual organisations often employ different methods, which presents a challenge when a number of organisations come together to work on tourism marketing campaigns. Such partnerships are important to Brecon Beacons National Park, who have much to offer and to gain through working in this way.

In order to make maximum use of resources, it will make sense for the strategy to identify the broader UK consumer markets at which new walking product should be targeted. There will be a need to try to identify the overlap or link between walking segments and these broader consumer segments.

Wales Tourist Board (WTB) and Tourism Partnership Mid Wales (TPMW) are well placed to play a major part in the successful implementation of this strategy. Each has prioritised broadly similar target segments for their consumer campaigns. Figure 6.1 below shows how these two sets of segments can be related to each other and identifies the similarities between them. It should be noted that it appears that currently no attention is being paid to the 'low income/no family' market segment identified in Section 5.6.

Figure 6.1 WTB and TPMW Segment fit



The priority walking-specific market segments that we have considered fall down on their lack of clear linkage to these market segments used in national and regional consumer campaigns targeted at the broad population, such as those run by WTB and TPMW.

Discussions with Wales Tourist Board suggest that they have used information gathered on the holidaying preferences of the consumer segments to provide a rough measure of the overlap with the walking segments.

Based on this, Table 6.4 proposes a relationship between the walking segments identified as priorities in this strategy, and the consumer segments indicated above.

Table 6.4 Proposed walking tourism segment fit

Walking Tourism Priority Segments	WTB Segments that have major overlap with Walking Tourism Segments	TPMW segments that have major overlap with Walking Tourism Segments
Independent, centre-based, walking holiday and break takers	Risers Affluent Early Retired Affluent Empty Nesters	Young Activity Seekers Affluent Retired Working Empty Nesters
Primary holiday walkers	Affluent Early Retired Affluent Empty Nesters	Affluent Retired Working Empty Nesters
Incidental holiday walkers	Risers Affluent Early Retired Affluent Empty Nesters Better off Families Pre-family Professionals	Affluent Retired Working Empty Nesters Young Activity Seekers Families with pres/school children
Independent hillwalking break takers	Pre-family Professionals Risers	Young Activity Seekers
Primary walking day visitors	N/a*	N/a*
Packaged walking holiday takers	Affluent Early Retired Affluent Empty Nesters	Affluent Retired Working Empty Nesters
Group walking (breaks and day visitors)	N/a*	N/a*

Note: * WTB and TPMW segments relate only to staying visitors.

7 TOWARDS A WALKING TOURISM STRATEGY FOR THE BRECON BEACONS NATIONAL PARK

This section reviews the emerging consensus about the opportunities for guiding the development of walking tourism in the Brecon Beacons National Park. It is based on consultations undertaken as part of the development of this strategy, including:

- a consultation workshop held in Brecon on 5th July, attended by 24 representatives of the public and private sectors;
- a survey of tourism enterprises throughout the National Park area, which received 121 responses

7.1 SWOT analysis

The following is an analysis of the strengths, weaknesses, opportunities and threats of the Brecon Beacons National Park area as a walking tourism destination.

Strengths	Weaknesses
<ul style="list-style-type: none"> • Designation as a National Park • The variety of outstanding landscapes: peaks, ridges, remote areas, rivers, canals, waterfalls, lakes, farmland and forest • Safe, varied, challenging terrain • Fantastic views: from the tops and of the tops • The great access opportunity within the Park: low level linear access; high level open access • Relatively accessible summits and ridges: excellent ratio of reward for effort • Possible to find solitude • Access is managed (BBNP/National Trust/Forestry Commission) • Good access to walking markets: regional population (Bristol, Cardiff) and 2.5 hrs to London • Tourism product strengths: <ul style="list-style-type: none"> – Strong self-catering product – Some good camp/caravan sites – Bunkhouse barns and YHA – A number of award winning pubs and restaurants – Beacons Active – Guided walks programmes – BBNP and Park Society – Bus services supported and promoted by Park 	<ul style="list-style-type: none"> • BBNP has a low profile within family of national parks • No marketing identity for the BBNP • Perceived lack of appreciation of the economic importance of tourism and walking to the Park. • Complex delivery partnerships – multi local authority and region • Tourism and countryside services not well connected in surrounding authorities • High management demands of rights of way network: maintenance, signage and waymarking. • Tendency to promote more demanding routes • Lack of well known trail/routes • Low interest from walking holiday operators • Limited information distribution and presentation • Distribution of accommodation, skewed to north east and east of the NP • Variable quality: serviced accommodation; eating; customer service. • Perception of poor promotion and reliability of existing public transport • Lack of visitor attractions

Opportunities	Threats
<ul style="list-style-type: none"> • Growth of interest in health and wellbeing • High proportion of first time visitors to NP • Interest of competitor destinations diverted to new niche markets • Use promotional opportunities eg Walking Wales, Country Walking • Develop new offer to match market requirements, extending recreational walking opportunities, lowland walks and circular routes • Lengthen the tourist season • TGA activity • Engage with the industry, promoting benefits of walking product to businesses • Industry interest eg. Walkers Welcome • Interest of YHA, Association of Bunkhouse Operators • Development of BBNP Rights of Way Improvement Plan • Review of BBNP information services (walks publications, guided walks, information centres) • Development of new long distance routes, such as Beacons Way • Good rail access to edge of NP at Abergavenny • Plan, connect and promote parking, public transport and walking • Farming community interest in diversification eg secure car parking on farm • Less negative attitude detected re sensitivity of protected areas 	<ul style="list-style-type: none"> • Aggressive interest in same markets from some competitor destinations promoting walking • Wales Tourist Board focus on recreational walking overlooks BBNP strengths • CRoW Act – new open access in other, competing areas • Potential degradation of National Park quality (eg off road vehicle intrusion, windfarms) • Sheer amount of access opportunity is a management challenge for BBNP • Pressure on management funding, including NP, FC, NT • Attitude to access of some farmers • Variable quality of accommodation and food and drink • Car park security • Public transport time-tabling, including weekend operations • Burden of H&S legislation in a risk averse culture • Footpath erosion and potential environmental damage in heavily visited walking areas

7.2 An emerging prospectus for walking tourism in the BBNP

Through a series of structured tasks, the workshop developed an aspirational prospectus for the Brecon Beacons as a walking tourism destination, summarised below.

The Brecon Beacons will be recognised as ...

- The walking destination of first choice for southern Britain.
- An easily accessible unspoilt area with opportunities for a wide range of walkers in a unique and distinctive landscape.
- A centre of excellence for year round walking with safe, reliable, well-signed routes and good, accurate information.
- A high quality all season product, marketed for its hospitality, food, events, activities and locations

The Brecon Beacons will attract ...

- A higher proportion of staying visitors – from within and, increasingly from outside, the UK.
- A higher proportion of repeat visits
- Two-night weekend visits
- Mid-week and year round visits
- Walkers of all ages and ability who value the qualities of the area
- High spending, ABC1 visitors with a low impact on the environment
- Both low level and high level walkers

... to come walking here.

Walking in the Brecon Beacons will be ...

- High quality
- Value for money
- User friendly:
 - Easy to access*
 - Easy to choose an appropriate route*
 - Easy to find the way*
- Well maintained and signposted
- Safe
- Available to a whole range of abilities
- Facilitated by reliable information in several languages
- Served by a good integrated transport system
- Energising, enriching, rewarding
- A distinctively Welsh experience
- A family-friendly activity
- A dog-friendly activity

People will feel ...

- Welcomed
- Safe and secure
- Surprised by the tremendous variety
- Wonder
- Relaxed and exhilarated
- Cared for
- That they have had a quality experience
- That the experience has been well matched to their need
- That their expectations have been exceeded
- That they have had good value for money
- That they understand more about the special qualities of areas that they have visited within park
- That they want to come back here
- That they will tell others about the area

... about walking in the Brecon Beacons

7.3 Improving opportunities for walking tourism in BBNP

Suggestions from the workshop for how this aspirational prospectus could be achieved fell into the following action areas:

- Improving the walking resource
- Developing the walking product
- Improving preparation and distribution of information about walking
- Promoting BBNP as a walking destination
- Improving transport access to walking opportunities
- Delivering an improved service for visitors through working together

Enterprises were also asked in their survey what importance they would attach to four suggested kinds of assistance that might help their business to gain more benefit from the walking product in the National Park. The assistance that was considered most important was 'Support for improved information about existing walking opportunities', followed closely by 'Support to improve signing and waymarking of existing walking routes'.

7.4 Consideration of possible objectives for walking tourism in BBNP

The workshop also undertook an exercise to rank a selection of possible objectives for the Walking Tourism Strategy, in order of importance to the individuals present. The results are given below, with the objective considered most important first.

	Score
Extends the season for visits to the Park	185
Encourages current visitors to stay for longer in the Park	174
Brings new economic benefit to the Park area	172
Gives visitors an experience based on the special qualities of the National Park	171
Introduces visitors to a better understanding of the Park	161
Distributes spending more widely across the National Park	124
Supports the services on which those who live in the Park depend	117
Reduces the environmental impact of every £ spent by visitors	116
Improves the health and well-being of those who come to the Park	86
Encourages visitors to use public transport	79
Offers opportunities and benefits to the farming community	74

There is broad agreement that the focus of this walking tourism strategy should be on increasing economic benefit, and that visitors should be offered a walking experience that is based on the special qualities of the Park. Objectives that relate to environmental and community benefit are important considerations for the National Park Authority, yet were less well supported by participants at the workshop.

7.5 Aims and vision for a walking tourism strategy for the Brecon Beacons National Park

In developing this walking tourism strategy, the National Park Authority has to be mindful of its wider responsibilities. Their commitment to a Sustainable Tourism Strategy suggests that the walking tourism strategy should be based on the integration of economic objectives with environmental conservation and community development.

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.

The **vision** for walking tourism is that in 2010:

All visitors to the Brecon Beacons National Park area can benefit from a high quality walking resource enabling them to identify walking opportunities well matched to their interests and abilities and which adds significant enjoyment to their visit.

Walkers enjoy and respect the high quality of the National Park environment, and are led to walk in places where they will cause minimal damage or disturbance. Clear advice and information is offered to walkers that supports their safe use of the National Park, and their understanding of its special qualities. Walking routes are designed to keep to a minimum the unnecessary movement of traffic, and wherever possible with public transport access in mind. Access routes are well maintained, well signed and used with confidence.

Visitors are aware of the many opportunities to enhance their walking experiences year round by enjoying the hospitality that is offered within the Park. They are drawn to stay longer, visit more often and recommend others to enjoy the experience of staying and walking in the Brecon Beacons National Park.

7.6 Objectives for the walking tourism strategy

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

1. To develop a high quality and environmentally robust walking infrastructure that is appropriate to the identified target markets
2. To provide an excellent walking and tourism experience that will encourage repeat visits and recommendations
3. To encourage those visitors already committed to the Park to consider extending their visits and to spend more in association with their walking activity
4. To encourage those visitors already committed to the Park to consider new visits, especially in the off-peak season and where possible mid-week.
5. To encourage new visitors to consider the Brecon Beacons as a walking destination that can sustain a staying visit at any time of year
6. To make use of all available information opportunities to promote the enjoyment of walking in the National Park
7. 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
8. To encourage visitors to keep car miles to a minimum
9. To monitor the impact of walking tourism on the economy, communities and the environment

8 PRODUCT DEVELOPMENT FOR TARGET MARKETS

8.1 Commentary on priority market segments

The selection of key market segments was discussed in section 6.3, and agreed as follows:

Table 8.1 *Priority market segments*

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

These will form the target market segments for the development of the walking tourism strategy.

8.1.1. Moderate challenge walking

Before commenting on each of these selected market segments, we reflect on a particular strength of the walking product in the Brecon Beacons.

Market segmentation based on type of walking product usually splits the market between two extremes – hill walking and low level walking. However, our assessment of the walking product within the Brecon Beacons suggests that one of the strengths of the National Park lies in walking that offers moderate challenge and good reward for effort.

The dearth of information on this type of ‘moderate challenge walking’ means that matching the Brecon Beacons walking product to potential markets is not simple. However, the segment-specific market information contained in the national walking tourism strategy enables us to identify three of the four selected primary target markets where this kind of walking may be especially important:

1. *Primary holiday walkers*
2. *Independent centre-based walking holiday and break-takers*

It is likely that the more experienced amongst these two segments will wish to engage in at least some moderately challenging walking, rather than exclusively low level walking.

3. *Independent hill walking break takers*

At the other end of the spectrum, the Brecon Beacons is likely to appeal to the softer end of this more ambitious market.

Special consideration will be given to the needs of these groups for walking opportunities that offer moderate challenge.

8.1.2. Primary market segments

The primary market segments offer the best strategic match between market potential and opportunity within the Brecon Beacons National Park. Product development and communications will be focused around these key segments.

Independent Centre-based Walking Holiday and Break Takers

The segment is already reached by national marketing activity. WTB research³⁹ found that 92% of the recipients of the Walking Wales brochure that were identified as walking holiday takers had opted for centre-based, as opposed to point-to-point, walking holidays. Couples of all ages are included in this segment.

Keener or more experienced walkers in the segment are likely to respond positively to the setting of a hill-walking area such as the BBNP. Younger, pre-family elements of the Independent Centre-based walking holiday and break takers are likely to be particularly attracted to a moderate challenge product.

The product requirements of this segment will also appeal to the holiday walking market.

A geographic targeting of this segment is proposed, focusing on markets in the South East and the M4 corridor.

- The Brecon Beacons provides the closest high level walking to this geographical market, an important consideration given the predominance of the short break market.
- Local data⁴⁰ suggests that many existing staying visitors emanate from London and the South East
- London and the South East accounts for a greater proportion of walking holidays to Wales than of holiday walking trips⁴¹.
- Rail connections from London to the edge of the Park are good (e.g. it is possible to leave London at 18.00 on a Friday evening and be in Abergavenny at 20.23)
- Partner agencies such as TPMW and WTB are already focusing resources on targeting the South East market.

Primary holiday walkers

Primary holiday walkers consist of holiday walking couples and family holiday walkers. Couples rather than families are chosen as the priority as they are the more significant segment, and their more flexible holidaying patterns offer a better chance of reducing the seasonality of tourism within the National Park.

The segment represents a good strategic fit with other organisations' priorities, as *empty-nester couples* and the *affluent retired* are amongst the primary target markets of both the WTB and TPMW.

39 Best Foot Forward, Appendix 3, Wales Tourist Board 2004

40 data from Brecon Beacons Holiday Cottages

41 Best Foot Forward, Appendix 10, Wales Tourist Board

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. It is likely that investment in signposting and the general quality of the low-level rights of way network within the BBNP will be required in order to satisfy this group.

As well as low level walking, some more experienced walkers, including considerable numbers of empty nester couples and younger, pre-family couples within this segment, may wish to engage with some moderate challenge.

Incidental holiday walkers

Incidental holiday walkers make up a much larger market than primary holiday walkers, making it a priority segment to address. The goal will be to encourage repeat visits and word of mouth recommendations. The key approach will be to raise current visitor levels of satisfaction, by offering easily accessible, appropriate, rewarding and reliable walking experiences and encouraging their take up.

Independent hillwalking break-takers

This segment is not currently a priority for Wales Tourist Board at a national level, due to the lack of a pan-Wales product. However, the segment was identified within the national walking tourism strategy as potentially important for both the Brecon Beacons National Park and Snowdonia. WTB have indicated that they would look favourably upon initiatives aimed to address this segment by those in the private sector with appropriate regional product.

The national walking tourism strategy describes this segment as “looking for all-action walking experiences in wild and challenging terrain”. There is a good fit, particularly at the softer end of this market, with the product on offer in the Brecon Beacons National Park.

The Brecon Beacons NP can lay claim to offer the closest area of upland walking to the key markets of the M4 corridor and South East England. (Pen y Fan is the highest summit in southern Britain). Both the WTB and TPMW have identified these geographical target areas as key components in their current campaigns.

This segment is thought to be looking for clearly signed routes, ideally circular walks of 8 – 15 miles (13-24km). They may be encouraged to consider the more challenging central and western areas of the park, and there is suitable accommodation with good access to this area. The environmentally sensitive nature of parts of the area means that careful consideration will need to be given as to how their walking requirements can best be met.

Key methods of reaching this audience include specialist walking and outdoor magazines.

8.1.3. Secondary market segments

These market segments may have less to offer to the Brecon Beacons, but they should continue to receive consideration.

Packaged walking holiday takers

The wide range of landscapes and the prestige of its designation as a National Park are product strengths with which to attack this market. However, currently few

walking holiday operators feature the area as a destination. A higher profile may persuade operators that the Brecon Beacons will stand out amongst increasing competition from other UK destinations. The sector focus on named walking routes currently puts the Brecon Beacons at a disadvantage. The availability of capacity to accommodate small to medium sized groups may also be an issue.

Primary walking day visitors

Day visitors account for a significant proportion of the Park's total visitors, and of these many come particularly to walk⁴², making this an important target segment. 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. It may also prove possible to convert some current day visitors into future staying visitors.

Group walking visitors

Although a small market, the Brecon Beacons is an attractive destination for the serious walkers that tend to make up many rambler/walking groups. The large resident population nearby also makes this a viable target market to develop. It will be important to address adding value to the walking product for this segment. A particular opportunity is to develop off-peak visits, as this segment are likely to appreciate visiting during less crowded times of the year.

8.2 Developing product relevant to the needs of key market segments

Walking opportunities that are differentiated by length, terrain and geographical location should be chosen to reflect the requirements of selected priority markets, appropriate accommodation sectors and the resource opportunity.

Table 8.2 summarises the characteristics of the prioritised target market segments, including their requirements for walking and accommodation.

Short objectives that are particularly appropriate to each segment have been selected from the following list:

- To encourage visitors to spend more time in the Park
- To encourage visitors to spend more in association with their walking experience
- To encourage repeat visits and recommendations
- To encourage visitors to walk and understand more
- To encourage visitors to keep car miles to a minimum

Finally, approaches are indicated that contribute to meeting each of these objectives.

42 Based on figures taken from BBNP Visitor Information and Interpretation Research and STEAM 2003.

Table 8.2 Approach to product development, differentiated by target market segment

	Who?	Walk requirement	Accommodation	Comment	Objective	Approach
Primary markets						
Holiday Walking						
Incidental holiday walkers	<ul style="list-style-type: none"> • Risers • Affluent Early Retired • Affluent Empty Nesters • Better Off Families • Pre-family professionals 	<ul style="list-style-type: none"> • Short walks of no more than 2-3 miles (3-5km) along clearly defined and waymarked paths. • Walking along or to specific landscape features such as waterfalls, lakes or viewpoints. 	<ul style="list-style-type: none"> • Accommodation – all types • May be particularly relevant to families in self-catering accommodation and caravan/camping • More time to influence longer stays 	<ul style="list-style-type: none"> • Information on walks most likely to be obtained from TICs or accommodation establishments. • Walks linked to water are identified in Best Foot Forward as being particularly popular with children 	<ul style="list-style-type: none"> • Encourage repeat visits and recommendations • Encourage visitors to walk and understand more 	<ul style="list-style-type: none"> • Offer simple walking experiences that provide a rewarding experience, meeting common standards (least restrictive access, car parking, toilets, good signing) • Offer programme of guided walks
Primary holiday walkers	<ul style="list-style-type: none"> • Affluent Early Retired • Affluent Empty Nesters 	<ul style="list-style-type: none"> • Easy country of around 4-6 miles (6-5-10km) across fairly gentle terrain. • Circular walks are particular popular: linear walks will also be undertaken. 	<ul style="list-style-type: none"> • B&B, self-catering, small hotels and inns 		<ul style="list-style-type: none"> • Encourage repeat visits and recommendations • Encourage visitors to spend more in association with their walking experience 	<ul style="list-style-type: none"> • Offer walking experiences that provide a rewarding experience • Present a number of walking experiences that are well integrated with selected places to eat and drink

Table 8.2 Approach to product development, differentiated by target market segment

	Who?	Walk requirement	Accommodation	Comment	Objective	Approach
Walking holidays						
Independent centre-based walking holidays and break-takers	<ul style="list-style-type: none"> • Risers • Affluent Early Retired • Affluent Empty Nesters 	<ul style="list-style-type: none"> • Easy country walks of varying lengths, most commonly around 5-7 miles (8-11km). • Keener walkers interested in longer distances and hill walking. • Primarily looking for circular walks, but also linear walks along a landscape feature or stretch of a promoted route. 	<ul style="list-style-type: none"> • Short breaks in B&Bs, small hotels, inns, and self-catering. • Families tend to stay primarily in self-catering accommodation. 	<ul style="list-style-type: none"> • Local walks leaflets are obtained primarily at the destination, or borrowed from accommodation establishments. • Signposting and waymarking is of importance, irrespective of experience • Keen walkers use published material for ideas on where to walk. • Some interest in guided walks. • Affluent retired may respond to mid-week breaks 	<ul style="list-style-type: none"> • Encourage new visitors to consider the Brecon Beacons as a walking destination • Encourage repeat visits and recommendations • Encourage visitors to spend more time in the Park • Encourage visitors to walk and understand more • Encourage visitors to keep car miles to a minimum 	<ul style="list-style-type: none"> • Associate walking opportunities with tempting places to enjoy a stay as part of a whole visitor experience • Offer walking experiences that are considered to meet their needs and provide a rewarding experience • Offer programme of guided walks • Present other walking opportunities that are similar to, or progress from, one that they have enjoyed • Offer walking experiences that are well connected with accommodation, including public transport provision
Independent Hill Walking Break Takers	<ul style="list-style-type: none"> • Pre-family professionals • Risers 	<ul style="list-style-type: none"> • Circular hill walking routes of 8-15 miles (13-24km). • Also more challenging stretches of National Trails or long distance walks. 	<ul style="list-style-type: none"> • Weekend breaks using youth hostels, camping, bunkhouses with pub at hand. • Some use of larger self-catering properties. 	<ul style="list-style-type: none"> • Interested also in other adventure activities. 	<ul style="list-style-type: none"> • Encourage new visitors to consider the Brecon Beacons as a walking destination • Encourage repeat visits and recommendations • Encourage visitors to 	<ul style="list-style-type: none"> • Support promotion of group accommodation, including larger self-catering properties, in association with well researched route information • Offer walking experiences that are well

Table 8.2 Approach to product development, differentiated by target market segment

	Who?	Walk requirement	Accommodation	Comment	Objective	Approach
					keep car miles to a minimum	connected with accommodation, including public transport provision
Secondary Markets						
Packaged Walking Holiday Takers	<ul style="list-style-type: none"> Affluent Early Retired Affluent Empty Nesters 	<ul style="list-style-type: none"> Favour named routes, including National Trails. 	<ul style="list-style-type: none"> Evenly divided between centre-based and point-to-point holidays. Accommodation tends to be B&Bs, guesthouses, inns, and small hotels. 		<ul style="list-style-type: none"> Encourage package operators to consider the Brecon Beacons as a walking destination 	<ul style="list-style-type: none"> Develop a recreational route or routes, meeting proposed set of criteria
Primary Walking Day Visitors	<ul style="list-style-type: none"> n/a 	<ul style="list-style-type: none"> Looking for walks of 4-6 miles (6.5-10km), primarily easy country walks. Keen walkers walk longer distances and in the hills. Circular walks are most popular, but also interested linear walks along a landscape feature or a stretch of promoted route. 		<ul style="list-style-type: none"> A minority may join guided walks. Some interest in walks accessible by public transport. 	<ul style="list-style-type: none"> Encourage visitors to spend more in association with their walking experience Encourage visitors to walk and understand more Encourage visitors to keep car miles to a minimum <i>(In longer term, encourage visitors to spend more time in the Park)</i> 	<ul style="list-style-type: none"> Present a number of walking experiences that are well integrated with selected places to eat and drink Offer programme of guided walks Offer walking experiences that are well connected with public transport provision <i>(In longer term, offer walking experiences that are well connected with accommodation)</i>

Walk opportunities should be developed that make the most of the natural assets and features of the Park, designed around the walking needs of the priority market segments.

The following product development opportunities are suggested by this analysis.

- A portfolio of simple, 2-3 mile (3-5km) walks, providing simple rewarding experiences for existing holidaymakers, wherever possible meeting common standards (least restrictive access, car parking, accessible toilets, good signing). The existing 'Waterside Places' leaflet offers a possible base from which this could be developed. *Incidental holiday walkers; throughout the National Park.*
- A selection of easy walking experiences (4-6 miles, 6.5–10km) that are well integrated with selected places to eat and drink. *Primary holiday walkers; focused on the south, east and north-east of the Park.*
- A portfolio of easy walking experiences (5-7 miles, 8-11km) offering rewarding experiences easily accessible to serviced accommodation. *Independent centre based walking holidays and break takers; focused on the east and north-east of the Park.*
- A portfolio of more challenging walking experiences (7+ miles, 11+km). These should be easily accessible from a range of accommodation. *Independent centre based walking holidays and break takers, independent hill-walking break takers; 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, 13-20km), developed in association with, and promoted through, group accommodation, including larger self-catering properties. *Independent hill-walking break takers; this will include some routes in the western part of the Park.*
- A programme of guided walks that focuses on 'moderate' walks; mid-week walks should be included
- A recreational route, or routes.

It should be noted that it will not always be necessary to develop new routes: we would anticipate that some of the existing walks published by the National Park and others will find a place within one or more of the suggested portfolios. Product development should favour routes that meet the needs of more than one market segment.

9 PRIORITIES FOR ACTION

In this section, we consider a set of approaches and actions in relation to each of the nine strategic objectives identified in 7.6. Each proposal is cross-referenced (in brackets) to related actions in Section 10, Summary of Actions, using the appropriate action reference.

9.1 Develop a high quality and environmentally robust walking infrastructure

The access resource

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

Investment will be required to secure an access network in the Brecon Beacons that is maintained and managed to match the highest standards of any UK destination that is competing for similar walking markets. The National Park Authority should assure a minimum standard across the entire access network, and the Rights of Way Improvement Plan will consider these issues in a wider context (**NPP1**). Additional investment may be required in the preparation and maintenance of those parts of the access network selected as priorities for tourism product development (**NPP2**). The low level network, dense with Rights of Way, may be important here. These issues may be addressed through the creation of a Priority Path Network (see below)

Adequate resource levels should be provided to ensure that not only the National Park, but also partners such as the National Trust and Forestry Commission, are able to meet the pressures of their management commitments.

The introduction of new Open Access across England and Wales brings with it new competition. The Brecon Beacons National Park is being supported in meeting newly defined and shared management standards for such access.

Creating a Priority Path Network

The budget that would be required to improve and maintain the accessibility of every public path in the Park is unlikely to be attainable in the short term. Moreover from a tourism perspective there is little sense in opening up all paths irrespective of their location, use and condition.

It is suggested that the way forward is to identify those paths that have the greatest value, or potential value, to the community and visitors. This value may be in terms of contribution to the local economy through tourism, through health benefits or through local use and enjoyment. By prioritising these paths for action the Authority will be achieving the best value for its investment.

This does not mean that all non-prioritised paths can be ignored: the Authority cannot escape its delegated highway authority duties, but it does give a priority framework for the sensible targeting of investment.

Having recognised the critical dependence of the tourism industry on the accessibility of the countryside, and having also recognised that the upgrade and maintenance of every path is not an option, then the establishment of a priority path network becomes an essential next step.

The task of identifying the priority path network on the ground falls outside the scope of this strategy and should form a part of the development of the Rights of Way Improvement Plan. Specifically the process should include consultation with interest groups and be as objective and rational as possible. In deciding the particular priority of any one path, the decision making process should be recorded making the whole process transparent and auditable.

It is suggested that a three-category system is put in place. A number of criteria need to be considered when classifying a path into one of these categories:

High priority

All promoted national or regional trails, or important connections to them

Paths promoted or endorsed by the NPA as tourism products

All paths (except 'dead-ends') in or within 1km of a settlement

Paths providing access to formal, well visited visitor attractions, accommodation and businesses

Paths known to be in popular use

Paths accessible to people with limited mobility or sensory impairments

All paths in this category should:

- Have the highest quality infrastructure
- Be made easy to follow without a detailed map
- Have infrastructure giving least restrictive access (e.g. gates prioritised over stiles)
- Be subject to a more intensive vegetation cutting regime (perhaps twice per year)
- Be subject to most frequent survey (perhaps once every 2 years)

Standard priority

Paths with potential to provide new promoted trails or circular routes

Paths providing important access to or within attractive landscape features

Important access to or within CROW access land

Paths connecting to public transport nodes

All paths in this category should:

- Have standard quality infrastructure
- Be made easy to follow if using an Ordnance Survey or other detailed map
- Be subject to restricted vegetation cutting (perhaps once per year)
- Be subject to occasional survey (perhaps once every 5 years)

Reactive priority

'Dead end' paths

Paths that run parallel with others that have a clearly higher priority

Paths requiring excessive investment

Paths under legal / definitive map review or possibly subject to diversion / extinguishments

All paths in this category should:

- Rarely be subject to pro-active work of any kind
- Be governed by the adoption of least resource approach, where reactive work is demanded

Environmental considerations

The environmental impact of walkers and walking on the natural environment is generally considered to be minimal, especially where it is well managed and supported by good information for walkers. However, the National Park Authority will wish to adopt the highest standards of management practice in seeking to maintain the biological diversity of the Park.

GIS data offers the opportunity to screen proposals for new route development against habitat designations and known occurrence of protected species. Work has been completed in the development of this strategy to identify potential walking / conservation conflict areas (see section 2.6.3), but at present data limitations restrict the effectiveness of this process. The NPA should work with BIS to improve on this situation. Screening should be used routinely, to flag up occasions when the advice of CCW or the appropriate regulator/manager should be sought, or in the unlikely event of a potential conflict of interest (**NPP5**)

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.

Guiding principles and good practice for walking at National Trust properties provides the basis for a possible framework that could be developed for adoption by partners in the BBNPA:

- Promote the Countryside Code – Respect, Protect, Enjoy
- Assess and predict levels of use before undertaking new promotional initiatives; ensure damage is unlikely to occur and that staffing and maintenance resources are adequate
- Provide information which gives guidance on where to go, what to see, how to get there and what walking conditions to expect, which helps to create an awareness and understanding of the countryside
- Seek to influence the content of non – (National Park) promotional literature (guidebooks etc,) and identify opportunities for joint publication
- Assess critically the need for erosion repair, especially in the uplands
- Assess paths for long-term sustainability and where practicable seek to re-route those that are badly sited, prohibitively expensive to maintain or damaging features of interest
- Replace stiles with kissing or self-closing gates wherever possible
- Many walkers seek peace and quiet and a sense of wilderness: the (National Park) recognises this and should provide for it
- Encourage and make it easier for visitors to walk to (National Park locations) from their homes, (visitor accommodation) or public transport links

Words in brackets are alterations from the National Trust original

Developing a set of NPA criteria for route development, including avoidance of unnecessary visitor pressure and erosion damage, will provide a common framework for the National Park and its partners. Such criteria should also give due attention to the need to ensure the maintenance of the biodiversity of the Park (**WTP1**). These criteria can be shared and discussed with commercial publishers and journalists at the point that they begin to research new routes within the NP, with the possibility of awarding a National Park 'kitemark' to indicate those routes that meet the criteria (**WTP3**).

Encouraging the development and promotion of walking routes based on individual accommodation enterprises will help to disperse visitor pressure. Where they can be demonstrated to meet BBNPA criteria, support should be given to joint private sector initiatives to develop and market new walking tourism products, for example the Association of Bunkhouse Operators' BootsBikesBunkhouse initiatives. **(MA7)**.

The National Park Authority will wish to consider the forward management implications of maintaining to a high standard any new product that it introduces and endorses.

9.2 Provide an excellent walking and tourism experience that will encourage repeat visits and recommendations

Visitors should be invited to use an access network that can be used with confidence. Any walk that is endorsed by the BBNPA should be well maintained, problem free, well signed and waymarked. **(NPP2)**

Ensuring the highest quality standards in visitor facilities and services will add value to the walking experience. This concern goes much wider than walking tourism: it underpins all tourism growth in the Brecon Beacons National Park. Although there are real quality strengths in some sectors, market segment profiles indicate that walkers are looking for a range of types of accommodation. There will be a requirement for high quality in all sectors, representing at minimum 'best of its kind' and 'excellent value for money'. **(NPP3)**

Distinctiveness can be added to the general experience of holidaying in the Brecon Beacons through short walks linked with local food. It will be important that food offers do not disappoint. Not only should those catering enterprises that are already successful (True Taste of Wales, WDA Dining Out Guide, award winners) be engaged, but ways should be found to raise the quality of the general food offer. The availability of good food in the early evening may encourage walkers to eat or stay rather than head for home. **(NPP3)**

Special attention should be paid to enterprises that meet the requirements of walkers, especially those that have Walkers Welcome accreditation. New enterprises should be recruited to the scheme and, wherever possible, they should be encouraged to go beyond the basic requirements by adopting best practice measures **(WTP5)**. Development of a grant scheme dedicated to improving facilities for walkers at accommodation and pubs/places to eat (eg drying room, boot washing facilities) should be investigated. **(WTP6)**

A selection of walking opportunities should be made available that meet the needs of core visitor markets to the Park, including less committed walkers, providing a rewarding experience that exceeds their expectations **(PD1-7)**. The special requirements of those with restricted mobility are being addressed within the Rights of Way Improvement Plan.

The basic need to provide for a portfolio of simple, 2-3 mile (3-5km) walks, providing simple rewarding experiences throughout the National Park for existing holidaymakers, can be met through developing the existing 'Waterside Places' leaflet **(IS13)**. Wherever possible, common standards (least restrictive access, car parking, toilets, good signing) should be introduced, phasing any required improvements **(PD1)**. Incidental holiday walkers should be targeted by wide distribution of the

revamped leaflet throughout the Park, including through all accommodation sectors **(IS14)**.

The formation of a Walking Tourism Group (WTG) should be encouraged, bringing together a network of identified tourism enterprises, across the whole range of accommodation sectors, that wish to engage with and develop the walking product of the Brecon Beacons. **(WTP4)**. The aims of the partnership **(WTP5)** could include:

- Offer a training programme, including guided walks designed to familiarize them with a selection of walking opportunities, to accommodation operators who wish to take an active part in improving their knowledge of the local walking product.
- Encourage accommodation operators, including self-catering property owners/managers, to take part in Walkers' Welcome training.
- Encourage accommodation operators, including self-catering property owners/managers, to offer special walking opportunities to their visitors.
- Offer support to individual tourism enterprises or clusters of enterprises to become involved in the development of new routes, helping them with individual route planning.
- Develop a standardized format for the presentation of walks information, including templates for leaflet and web-mapping, that will enable accommodation operators to select and download routes on behalf of their visitors **(IS9)**.

A particular opportunity presents itself to investigate the possibility of 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 **(PD15)**. This would give not only give feedback on individual routes, but also presents a wider market research opportunity.

A geographic focus on the development of individual settlements as 'walking hubs' would enable a cluster of enterprises to work with the local community to prepare a set of new routes (see 9.8). **(PD9)**

9.3 Encourage those visitors already committed to the Park to consider extending their visits and to spend more in association with their walking activity

By presenting walking opportunities in association with tempting places to enjoy a stay, as part of a whole visitor experience, current visitors may be encouraged to stay for longer. A whole day, whole week culture should be presented in all press and media work, including familiarisation visits for journalists, rounding off an active day of walking with ideas for a relaxing hospitality experience. **(MA3)**

Information about walking opportunities should suggest connections to, or progression from, a walk that has already been enjoyed:

"If you liked this, then you might like this ..."

"If you managed this, then why not try ..."

"If the weather is too bad for this walk today, then you might try ..."

There are opportunities to make connections in walks information between the National Park landscape and local produce, identifying nearby places where good food can be enjoyed. Walking routes included in the National Park's own publications and those of its partners should routinely identify associated places to eat and drink, either on the route or near the start/finish. **(IS12)**

It may be appropriate to use car parks to provide information about places in the locality to eat and drink, using a combination of information available from attendants, ticket machines and signs. On screen information is planned for entry points to Open Access areas. **(IS15)**

There is a need for a collection of walking experiences that are well integrated with selected places to eat and drink. NPA staff involved in work on local food should be involved in setting criteria for inclusion, which may involve third party endorsement. Such a publication may find a commercial partner. **(PD3)**

9.4 Encourage those visitors already committed to the Park to consider new visits, especially in the off-peak season and where possible mid-week

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 a future occasion. 'Your Breathing Space' should be developed as a brand to convert day visitors from the Bristol/Cardiff areas, that captures the essence of the Brecon Beacons as a special place where they can get the most out of a walking trip through staying overnight. **(MA4)**

9.5 Encourage new visitors to consider the Brecon Beacons as a walking destination that can sustain a staying visit at any time of year

There is a great opportunity to raise the profile of the Brecon Beacons as the first choice walking destination for South Wales, the South West, M4 corridor and London/South East, with a USP based on a quality of upland walking that is not found elsewhere in southern Britain. **(MA1)**. A consistent message about walking in the Brecon Beacons should be developed that can be shared and used by all partners in their destination print. **(MA2)**

Wales Tourist Board 'Walking Wales' campaign should be supported with the development of appropriate product for the more recreational, short distance walker. **(PD1- 4)**. Such product should be incorporated into the walking campaigns or general destination marketing of partners, especially as part of Mid Wales and the Brecon Beacons (*Primary holiday walkers; Independent centre based walking holiday/break takers*). **(MA5)**

Partner authorities should consider a joint campaign using 'Country Walking' as a promotional vehicle. This could be a special promotion to encourage off-season or mid-week stays, involving enterprises offering discounts and self-catering accommodation prepared to promote short stays, and linked to a set of walks

specifically designed to be safely enjoyed off-season (**PD4**). A special Country Walking supplement or feature could be boosted with the selective insertion of a leaflet including accommodation offers targeted on magazines distributed in the SE and M4 corridor. (**MA8**)

Wales Tourist Board support should be sought for extending the Walking Wales campaign to promote moderately challenging walking in the Brecon Beacons, linked to the generic national park 'Breathing Spaces' branding (*Independent centre based walking holiday/break takers; Independent hill-walking break takers*). (**MA6**)

Presentation of the Beacons Way, a new long distance regional recreational walking route, should be designed in partnership with accommodation operators so that it best serves the needs of the National Park. As well as supporting accommodation with saleable product, this would encourage walking holiday package operators to consider the Brecon Beacons as a walking destination.

What could a regional route do for the BBNP?

Brecon Beacons National Park has missed out on many opportunities for promotion as a walking destination through the lack of a long distance trail. Only a small number of long distance trails or regional routes cross the Brecon Beacons National Park, and those that do offer very little reflection of its most rewarding features. Offa's Dyke National Trail is probably the best known, but has only a small impact on parts of the eastern edge of the Park.

Although our market segmentation exercise suggested that point-to-point walking and longer distance walking may not be especially important segments to pursue in the Brecon Beacons NP, there are a number of benefits that may arise from the development of a long distance regional route in the Park. A long distance regional route could:

- Attract new and existing walkers, generating new visits and overnight stays.
- Raise the profile of BBNP as a walking destination, through its appearance on leisure maps, walking directories, magazine articles, websites etc.
- Raise the profile of BBNP as a walking destination, through inclusion in the promotional campaigns of partner authorities and the regional tourism partnerships.
- Encourage walking tour operators to offer walking holidays based on the trail.
- Encourage authors of commercial guides to design walks that include stretches of the promoted route.

Criteria could be set for route design and presentation that will maximise the benefit to the National Park.

A long distance regional route should:

- Incorporate some key features of the National Park landscape
- Have some purpose or geographic rationale
- Offer flexibility of break points / day length
- Offer choice and capacity of accommodation, within easy range of every break point
- Involve a variety of landscape types, include some upland
- Offer poor weather alternatives to upland stretches
- Challenge the target markets, without being over-strenuous
- Offer moderate day sections (max. 8-10 miles (13-16km) a day)
- Offer public transport access to start and finish
- Offer public transport access to key break points
- Minimise the maintenance implications

- Be sensitive to environmental considerations

The Brecon Beacons Park Society has developed the Beacons Way, and plans for its introduction are well advanced. However, as proposed, the Beacons Way does not meet all of the above criteria and, in tourism terms, its impact as it stands may be limited.

However, the serpentine nature of the route means that it crosses a number of other trails and routes, opening up opportunities for shorter circuits that could be completed as 2 or 3 day walks. Without detracting from the main trail, it is possible to adapt the eastern half of the route with a braided circuit between Abergavenny and Brecon, taking advantage of the fine hills and ridges, and also of the concentration of accommodation and public transport links within the valleys. **(PD5)**

BBNPA should continue support to the BBPS for development of the Beacons Way. **(WTP7)**. In finalising the detail of the Beacons Way, consideration should be given to any additional options that may enable such linkages to be created, both now and in future. While we see the immediate opportunity for such linked routes in the east of the National Park, there may be future options further west.

It will be important to secure the inclusion of the Beacons Way in all listings of long distance trails and regional routes. **(MA10)**

9.6 Make use of all available information opportunities to promote the enjoyment of walking in the National Park

The ambition here is to produce good quality information that is well distributed for ease of use. Current walking information should be audited against the needs of key markets, in order to plan future provision. **(IS1)**.

A simple piece of print should be prepared that can be used to fulfil enquiries and campaigns, summarising the range of walking opportunities in the Brecon Beacons, together with details of further information available and an order form **(IS2)**. This should include reference to further sources of information about opportunities for those with restricted mobility.

The information needs of walkers are demanding. Prospective walkers must be able to select appropriate walk opportunities from within a range of possible options. They require easy access to the detailed information that will keep them safe and happy during their chosen walk. Information is also an important management tool, allowing the National Park to encourage visitors towards certain locations and to remain silent on others.

Route information that is published should offer a clear description of the walking choices that enables visitors to select a walk, or walks, that offers them the greatest rewards, yet is appropriate to their needs. The approach adopted by Country Walking is seen as a good standard that the Authority may wish to adopt or modify. **(IS8)**.

Route selection

It is important that potential path users are able to form an opinion of the suitability of a path or a promoted walk in terms of its physical characteristics. Whilst this is particularly relevant to people with limited mobility or sensory impairment, it is the sort of information that most users would be interested in, in order to make an informed choice amongst the routes on offer.

Traditionally walks have often been described in terms that effectively categorise routes in terms of the challenge that they present to people's ability or dependencies. Examples would be "strenuous walk" or "easy walk". Making these judgements on behalf of others is always going to be problematic.

A better way forward is simply to describe the key physical parameters of the walk itself, using meaningful and standardised terms. The following is the approach adopted by Country Walking:

Example:

IS THIS WALK FOR YOU?

Terrain Quiet lanes, metalled road, field paths and riverbank

Stiles 4

Suitable for Average walkers

A satellite to the BBNPA website should be developed that is dedicated to providing well organised information about walking opportunities, with clear links to and from associated tourism facilities and appropriate partner websites. **(IS4)**

Co-operation between National Park Information Centres (NPICs) and Tourist Information Centres (TICs) should be managed so an integrated network is offered to potential walking visitors that will fulfil their information needs, regardless of which route they use to access the system. **(NPP4)**

There should be good knowledge of the National Park Authority's approach to walking, including awareness of their objectives for sensitive environmental management, and of new developments in the walking product. This will involve training and regular briefings for information centre staff. **(IS5)**

The National Park Authority should develop a consistent approach to the display and promotion of walking across NPICs and TICs. **(IS6)**

Touchscreens are due to be installed at some key entry points to the new Open Access areas. Opportunities to provide information to walkers about facilities and services that are available locally should be investigated. **(IS15)**

Tourism enterprises have expressed interest in supplying their guests with walking information that will enhance their enjoyment of the area. Their front line contact with staying visitors enables them to select information that is well matched to the needs of the particular guest. Familiarity with the local area also enables them to select routes that show off the best features of the area of the Park that is local to them, and that they know can be used with confidence. The National Park should establish simple communication systems that enable them to support tourism enterprises, including outdoor gear shops, in distributing selected and appropriate walking

information to their guests, with priority given to members of the Walking Tourism Group. (IS7)

New ways of providing information

Traditionally pre-visit information has been provided to potential visitors through printed material (tourism brochures, walks leaflets etc), and to visitors within the Park using similar media and also through direct face to face contact. The rapid development of Internet technologies and the increasingly high levels of access to them are opening up new ways for people to find out about countryside and tourism opportunities.

Many countryside areas are now well represented on one or often multiple walking and tourism **websites**. Typically these include general descriptions of the 'walking offer'. Many now also provide for users to download detailed walks leaflets that they may print out before they leave home and take with them. This sort of information serves to raise awareness of what an area has to offer and encourage visits. At the same time it provides the detailed information that is needed when on-site. The best sites have links to accommodation search engines and on-line booking facilities. An example would be the recently redeveloped website for the South West Coast Path.

Interactive mapping is quickly also becoming a standard on public sector websites, having been identified as a high priority on the 'e-government' agenda. Interactive mapping allows users to use on-screen maps that automatically provide more and more detail as the user 'zooms' in, and then allows them to access further information about things that they can see on the map. For instance a diagrammatic map of the whole Park may show a number of boot symbols where there are published walks. Zooming in to one of these will start to show the rights of way network in the area with the promoted route highlighted. Zooming in further may reveal detailed accessibility information (such as gradients and the location of stiles) and also the location of tourism businesses. All of this can be 'live' information, pulled from databases that are maintained on a daily basis. Because of this, the web pages do not need to be rebuilt every time the information changes.

The Brecon Beacons NPA could gain a significant competitive advantage by developing an industry leading walking website, making use of interactive mapping and providing walking suggestions as downloads. Although initial investment would be significant, such a website will provide both a marketing platform and an information service. This has the potential to be a flagship project, and could provide a focus around which to build development of walking with tourism. Best practice should be investigated to guide aspirations and future development. (IS4)

An even more recent development is the introduction of hand held computers or **personal digital assistants (PDAs) and global positioning systems (GPS)**. PDAs allow interactive, computer based mapping to be used in the field. Users can link this equipment with websites, downloading walks and tourism information directly into their PDAs over the Internet. When used in conjunction with GPS, the PDA allows walkers to track their position in the countryside in real time.

Whilst still in the 'novelty' stage, sales of PDAs and GPS into the walking market are now commonplace and most of the big outdoor companies stock this equipment. Opportunities should be investigated for commercial partners to format BBNPA walk information to meet market interest in GPS/PDAs, perhaps in conjunction with other National Parks (IS16). The Festival of the Great Outdoors proposed for the Brecon Beacons could include some walking events that are based around the use of this technology. (MA11)

9.7 Make use of all available information and interpretation opportunities to promote an understanding of and respect for the special qualities of the National Park

An information campaign, pre- and post-arrival, should be planned to recruit support for well managed walking within the National Park, influencing visitors to amend their choice of walking activity and if necessary their behaviour in order to limit their environmental impact (**IS3**). A pre-arrival campaign developed jointly with other NPAs (particularly those with upland responsibilities) would enable more resources to be applied and achieve a higher impact. (**IS3**)

A Code of Conduct should be developed, that integrates messages about care for the environment with all general walking messages. (**WTP2**)

A Code of Conduct for walkers in the Brecon Beacons National Park

should include some or all of the following points:

Walk and understand more

Walk only where your impact can be absorbed

Avoid places and walks where your impact will be felt

Limit your walking in places where your impact will be felt

Bring your car but use it no more than you need to

Walk straight out of your door at least once during your stay

Walk out of your door as often as possible during your stay

Catch a bus and walk back at least once during your stay

Drive to your walk, but no further than you need

Don't bring your car at all

Walk from one overnight stop to another, carrying your own belongings

Walk from one overnight stop to another, with your belongings moved for you by a more direct route

Any partnership with a commercial publisher should require that these messages are incorporated within new guides, magazine features, on websites etc.. (**IS10**)

The part that walking and walking tourism can play within the overall interpretation strategy of the National Park Authority should be considered (**IS17**). Their responsibility to promote the opportunities for understanding and enjoyment of the special qualities of the Park by the public has been met in part through running a guided walks programme. The current review of this programme should include a review by purpose, market, length, location, challenge and timing of walks, in the light of interests of the priority market segments that have been identified. (**PD8**)

The attention of walkers should be engaged as they explore the area at close quarters and at a comparatively slow pace, through the use of carefully chosen text and illustrations in walks leaflets, information panels at the start of walks, and display material in Information Centres. Interpretation at key access points should be increased (**IS17**). There is an opportunity to lead visitors to learn about and explore on foot some of the special features of the Park, for instance through a set of wildlife walks. (**PD2**)

9.8 Encourage visitors to keep car miles to a minimum

The best way to encourage visitors to keep car miles to a minimum is to tempt them to include an overnight stay as part of their visit and to suggest walking opportunities that are on or near the doorstep of their accommodation. The distribution of access opportunities in the Park in relation to accommodation makes this a real possibility, and the set of walks developed for a Country Walking campaign will meet the requirement for walks that are well related to accommodation. **(PD4)**.

There is a great opportunity for the National Park to engage with local interest in the development and care of local routes. This can be achieved through establishing partnerships with clusters of tourism enterprises or with the whole community. Support should be focused on selected communities that can operate as centres of excellence for walking tourism, or walking tourism hubs. **(PD9)**

Walking hubs should meet some or all of the following criteria:

- Express interest and be prepared to make a commitment
- Have a pool of good quality accommodation that is keen to welcome walkers
- Include at least one place to eat, or a combination of places, so that hot food is available every day of the week and in the evenings
- Have public toilets that are maintained to a high standard
- Be served by regular (at least three times a day) public transport on a choice of routes
- Provide, or have quick access to, a taxi service that is willing to welcome walkers
- Have a small team of enthusiastic individuals that are willing to report on locally promoted routes, and if possible undertake small routine maintenance tasks
- Offer easy access to one or more promoted routes (Offa's Dyke Path, Wye Valley Walk, Taff Trail, Usk Valley Walk, Beacons Way) that can form the basis of a 2 or 3 day circular walk.

Crickhowell has already embarked on a programme of local route development. Other possible hubs that meet most of the above criteria include Abergavenny, Brecon, Hay, Talgarth and Blaenavon.

Smaller communities with a particular interest in local walking product could become designated 'walking villages'. While they may not be able to meet all the criteria, they could offer commitment, enthusiastic individuals, accommodation that welcomes walkers and catering businesses with good opening hours. There may be smaller communities in the west of the Park that can meet sufficient of these conditions to be considered for inclusion.

Such a programme would be supported by the preparation of a toolkit drawing on the experiences of the Wales Tourist Board walking tourism pilot initiatives, and including a brief and criteria set by the National Park. **(PD10)**

The second way to keep car miles to a minimum is for tourism enterprises to plan walking routes for their visitors that are based on their premises. The Association of Bunkhouse Operators and the YHA have both made significant progress with this, providing a good model for other sectors to follow. Appropriate support for promotion of these initiatives should be offered **(MA7)**. There may be potential for larger self-catering properties to take a similar approach, and this should be investigated. **(PD7)**

The third way to encourage visitors to keep their car miles to a minimum is to promote the use of public transport that meets the needs of Park users. Access by public transport should be considered as a criterion for all walks that are selected for publication or endorsed by BBNPA. **(IS11)**

The NPA is already engaged here, with its support for the suite of Beacons Bus services and the Offa's Dyke flyer on summer Sundays, and it is especially important to maintain that existing commitment **(WTP8)**. The services are increasingly well supported by the public. Their presence reinforces messages that encourage the use of public transport as a means of accessing the Park throughout the year.

These summer services are designed at present to meet the access needs of residents in neighbouring populated areas. The routes and timing of public transport services should be reviewed for their ability to link walking opportunities with accommodation, especially in the Abergavenny/Brecon and Hay-on-Wye/Brecon corridors. **(WTP9)**

Support should be sought for any opportunities for new public transport services (bus, rail, taxi) that emerge from short break options (PD5) and walking tourism hubs (PD9). **(PD11)**

Public transport journeys can be promoted 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, daily 'walking specials' could serve popular accommodation corridors, offering minibus access to popular walking areas on a rota basis, with a facility for pre-booking. 'Walkers Welcome' training and recognition could be offered to public transport operators, and to taxi drivers **(PS12)**. Accommodation operators should be recruited and encouraged to promote such services. **(PD13)**

Accommodation operators, including self-catering property owners/managers, engaged with the NPA on the development of local routes, could be encouraged to expand their options through incorporating public transport into individual walking routes based at their property.

Abergavenny deserves special consideration as a walking hub, based on its excellent access by rail and proximity to highlights of walking in and around the National Park, including Blaenafon, Walking Town. Work with Arriva could develop and promote train based walks. **(PD9)**

9.9 Monitor the impact of walking tourism on the economy, communities and the environment

Monitoring implementation of the strategy

As well as monitoring the effects of the various projects, both beneficial and unwanted, it is important that the implementation of the strategy itself is monitored.

It is suggested that a strategy delivery team is established comprising representatives from the key delivery partners. A key role of this group will be to monitor and evaluate outputs and outcomes, and keep the strategy under annual

review. As political, market and resource contexts change, 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.

The strategy includes a range of project recommendations that are summarised in section 10. When a project is initiated, all partners will be clear of their role within the project and the specific actions required of them. Delivery of these actions should be monitored and reported back to the strategy delivery team.

Each project will have a number of outputs (such as the publication of promotional material, or the development of a trail) that should be reported to the strategy delivery team on a regular basis.

The Brecon Beacons National Park Authority will wish to monitor carefully the impact of walking tourism on the economy, communities and the environment of the Brecon Beacons.

As well as outputs, projects will also have a number of outcomes (such as increased visitor numbers or expenditure). These outcomes are vitally important and also need to be monitored.

This in itself is a major exercise and needs to be designed so that it can be done as a matter of routine, requiring careful organisation and close co-operation between partners. **(NPP6, MO1)**

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. **(MO2)**

Obtaining regular, at least twice yearly, feedback from tourism enterprises on performance and take-up (precise measures to be agreed).

Establishing regular communication with local communities, especially those that are walking hubs, that records levels of satisfaction and identify problems. **(MO2)**

10 SUMMARY OF ACTIONS

The following set of tables summarises the actions that have been proposed in section 9 to meet each objective of the Walking Tourism Strategy. Here, the actions are grouped for convenience under the following headings:

- NPA Policies and Programmes (NPP)
- Walking Tourism Policies and Programmes (WTP)
- Information Services (IS)
- Product Development (PD)
- Marketing (MA)
- Monitoring (MO)

For each action we identify a lead partner, together with a number of potential partners. We also suggest both a priority and the level of resource that may be required.

ACTION NUMBER	ACTION	POTENTIAL PARTNERS	LEAD PARTNER	PRIORITY	LEVEL OF RESOURCE REQUIRED ¹
1. NPA POLICIES AND PROGRAMMES (NPP)					
NPP1	Invest to assure improvement and maintenance to at least an agreed minimum standard across the NPA access network	LAs, NT, FC	NPA	Ongoing – high priority	High
NPP2	Within the framework of a Priority Paths Network, maintain all promoted and endorsed routes to a high standard	LAs, NT, FC	NPA	High priority	Medium
NPP3	Raise the quality of accommodation and places to eat and drink within the National Park area	WTB, LAs, RTPs, WDA, PS	NPA/TGA	Ongoing – high priority	Staff time
NPP4	Co-ordinate NPIC/TIC delivery of information services relevant to walking	LAs, WTB	NPA	Ongoing – high priority	Staff time
NPP5	Develop GIS route screening system with BIS, as data improves	BIS, CCW	NPA	Y2→	Medium
NPP6	Ensure that all monitoring programmes are co-ordinated between partners for maximum efficiency and effectiveness	All partners	NPA	Ongoing – high priority	Staff time

¹ Low = £0 – £9,999; Medium = £10,000 - £45,999; High = £50K+

ACTION NUMBER	ACTION	POTENTIAL PARTNERS	LEAD PARTNER	PRIORITY	LEVEL OF RESOURCE REQUIRED ¹
2. WALKING TOURISM POLICIES AND PROGRAMMES (WTP)					
WTP1	Agree with partners a set of NPA guiding principles and good practice for walking, leading to published criteria for future route development	LAs, NT, FC	NPA	Y1	Low/staff time
WTP2	Develop a Code of Conduct for walking in the BBNP, integrating messages about care for the environment with all general walking messages	NT, FC, WW, CCW, PS	NPA	Y1 Y2 launch	Low/staff time
WTP3	Prepare information for commercial publishers and journalists setting out aspirations of the NPA for published routes – consider possible use of NPA endorsement		NPA	Y1	Low/staff time
WTP4	Establish a 'Walking Tourism Group' (WTG) – an identified network of tourism enterprises (by sector) that wish to engage with and develop the walking product	PS, WTB	NPA/TGA	Y1	Staff time
WTP5	Agree a support programme for tourism enterprises (eg training, programme of guided walks, Walkers Welcome, route planning and templates, promotion)	WTG, PS, WTB	NPA/TGA	Annual programme – high priority	Medium + staff time
WTP6	Investigate development of a dedicated grant scheme to improve facilities for walkers at accommodation and pubs/places to eat	PS, WTB	TGA	Y1 Y2 roll out	Staff time Y2 High
WTP7	Continue support to BBPS for development of the Beacons Way		NPA /BBPS	Y1	High + staff time
WTP8	Maintain and if possible extend Beacons Bus services, including Offa's Dyke Flyer	LAs, FC	NPA	Y1 →	Current +
WTP9	Review routes and timing of Beacons Bus services for ability to link walking opportunities with accommodation in Abergavenny/Brecon and Hay-on-Wye/Brecon corridors	WTG, NPA	LAs	Annual review	Staff time + low

¹ Low = £0 – £9,999; Medium = £10,000 - £45,999; High = £50K+

ACTION NUMBER	ACTION	POTENTIAL PARTNERS	LEAD PARTNER	PRIORITY	LEVEL OF RESOURCE REQUIRED ¹
3. INFORMATION SERVICES (IS)					
IS1	Audit current walking information provision against needs of key markets, identify gaps and plan action.		NPA	Y1	Staff time
IS2	Produce a simple piece of print that summarises range of walking opportunities in BBNP, with details and order form for further information available. Include Code of Conduct for walking in the BBNP.	LAs, FE, NT, WW, RTPs	NPA	Y1, refresh annually	Low
IS3	Plan an information campaign, pre- and post-arrival, to influence visitors to support well managed walking within the National Park. Joint development of pre-arrival campaign with other NPA would ensure maximum impact.	LAs, RTPs, WTB, NPs	NPA	Y2	Low + staff time
IS4	Develop a satellite website dedicated to walking in the BBNP, with links to partner websites. Investigate best practice to guide aspirations and future development.		NPA	Y1→	Medium + staff time
IS5	Develop training/briefing programme to ensure that all information centre staff are fully equipped to deal with enquiries about walking	NPICs, TICs, LAs, TGA	NPA	Y1, refresh annually	Staff time
IS6	Develop common display material about walking in the BBNP for all NPICs and TICs	NPICs, TICs, LAs	NPA	Y2	Medium
IS7	Establish an efficient communication/distribution system to provide all tourism enterprises with information on walking (with priority service for WTG members)	WTG, BBHC, ABO	NPA	Y1→	Low + staff time
IS8	Review walk classifications and information needs, to develop standard format for information given about all walks associated with NPA (published and guided)		NPA	Y1	Low + staff time
IS9	Develop a standardized format for the presentation of walks information, including templates for leaflet and web-mapping	LAs	NPA	Y1	Low + staff time
IS10	Develop partnerships with commercial publisher(s) supported by BBNPA guidance on target markets, information requirements etc.		NPA	Ongoing	Staff time
IS11	Routinely consider access by public transport as a criterion for walks selected for publication by NPA		NPA	Ongoing	Staff time
IS12	Routinely include information about nearby places to eat and drink in any walks information produced by National Park		NPA	Ongoing	Staff time

¹ Low = £0 – £9,999; Medium = £10,000 - £45,999; High = £50K+

ACTION NUMBER	ACTION	POTENTIAL PARTNERS	LEAD PARTNER	PRIORITY	LEVEL OF RESOURCE REQUIRED ¹
IS13	Develop existing 'Waterside Places' leaflet as a simple, free walking leaflet for incidental holiday walkers, with improved information on places to eat, services, toilets etc.	FC, WW, NT	NPA	Y1 – high priority Refresh at least every 2Y	Medium
IS14	Target incidental holiday walkers with revamped 'Waterside Places' through wide distribution throughout the Park, including via all accommodation.	WTG, TICs, NPICs	NPA	Y1→	Low
IS15	Make use of car parks and entry points to Open Access areas to provide information about services provided in the locality (food, drink, accommodation)	LAs, FC, NT	NPA	Y1→	Low
IS16	Investigate opportunities for commercial partners to format BBNPA walk information to meet market interest in GPS/PDAs	All NPAs	NPA	Y1	Medium
IS17	Consider the needs of walkers as an audience for interpretation by BBNPA, including messages for them in walks leaflets, information panels at the start of walks and information centres	FC, NT, NPICs, TICs	NPA	Ongoing	Low + staff time
4. PRODUCT DEVELOPMENT (PD)					
PD1	Review access infrastructure and facilities at all locations in 'Waterside Places', and prioritise improvements.	All site managers	NPA	Review Y! Implement Y2→	Staff time High
PD2	Develop and publish a set of 'Wildlife Walks' – short and easy (1-2 miles, 1.5-3km) aimed at incidental walkers		NPA	Y1	Staff time Low
PD3	Develop and publish a selection of easy walking experiences integrated with places to eat and drink, focused on the south, east and north-east of the Park, and including the Wye Valley corridor Hay-on-Wye to Boughrood.	PS, WDA, Powys CC	NPA to identify commercial partner	Develop Y2 Publish Y3	Staff time + low
PD4	Develop a set of walks (5-8 miles, 8-13km), well related to accommodation and designed to be walked with confidence in on- and off-season	WTG	NPA	Develop Y1 Publish Y2	Low + staff time
PD5	Develop short break options (2/3/4 days; centred-based and place-to-place) in eastern area (Abergavenny-Brecon), based on linking parts of Beacons Way, Offa's Dyke NT and Taff Trail	LAs, WTG, PS, BBPS	TGA	Develop Y1 Promote Y2→	Medium + staff time

¹ Low = £0 – £9,999; Medium = £10,000 - £45,999; High = £50K+

ACTION NUMBER	ACTION	POTENTIAL PARTNERS	LEAD PARTNER	PRIORITY	LEVEL OF RESOURCE REQUIRED¹
PD6	Co-operate with ABO in their BootsBikesBunkhouses initiative, especially supporting their development of longer hillwalking routes (8-12 miles, 13-19km) based on members' properties. Similarly YHA.	NPA	ABO YHA	Y1	Low + staff time
PD7	Investigate scope for extending BBB route development ideas to include larger self-catering properties.	ABO, BBHC		Y1 Implement Y2	Low + staff time
PD8	Review guided walks programmes of NPA and its partners, and set new guidelines and targets for any future programmes; focus on 'moderate' walks and mid-week walks for staying visitors.	BBPS	NPA	Review Y1 Implement ongoing	Staff time
PD9	Identify communities that are well placed to develop as 'walking tourism hubs', and introduce a rolling programme of support and implementation (1 community in Y1, 2 in future years).	PS, LAs, WDA	NPA	Y1 – 1 hub Y2 – 2 hubs Y3 – 2 hubs	High
PD10	Prepare a 'walking tourism toolkit' for use with BBNP hubs, drawing on experience of WTB pilot projects	NPA, TGA, LAs	WTB	Y1	Medium
PD11	Support any opportunities for new public transport services (bus, rail, taxi) that emerge from short break options (PD5) and walking tourism hubs (PD9)	LAs	NPA	Y1 ongoing	Medium
PD12	Offer 'Walkers Welcome' training and recognition to taxi drivers	PS	NPA	Y2	Low
PD13	Introduce summer weekday 'walking specials' minibus service, with pre-booked pick up from specified accommodation, to support a daily rota of walks	NPA, LAs	WTG	Pilot Y2 Full service Y3 onward	Medium
PD14	Review and develop a set of 'Bus walks' based on the core public transport network, primarily promoted through web based information.	LAs	NPA	Y2	Low + staff time
PD15	Investigate possibility of partnership with private sector agency for selected clients to trial and report on proposed new NPA walking routes.	PS	NPA	Y1 + Implement annual	Low + staff time

¹ Low = £0 – £9,999; Medium = £10,000 - £45,999; High = £50K+

ACTION NUMBER	ACTION	POTENTIAL PARTNERS	LEAD PARTNER	PRIORITY	LEVEL OF RESOURCE REQUIRED ¹
5. MARKETING (MA)					
MA1	Agree a USP for Brecon Beacons National Park as the walking destination of choice for southern Britain, based on its upland setting	RTPs, WTB, LAs, PS	STP	Y1	Staff time
MA2	Encourage all partners involved with marketing the Brecon Beacons to engage with market segments identified in this strategy and to integrate key messages into general tourism and specific walking tourism marketing materials	LAs, WTB, PS	NPA		
MA3	Recruit and support travel press interest in walking tourism as a 'whole week, whole year' product.	LAs, WTB	NPA	Ongoing	Staff time
MA4	Run 'Your Breathing Space' short breaks campaign, targeting previous day visitors from Bristol/Cardiff area with walking product and strong 'apres-walk' offer	LAs, WTG, BBHC, ABO	NPA	Y1 autumn Annual if successful	Low/medium
MA5	Arrange to support current WTB Walking Wales campaign with appropriate fulfilment material above (IS2)	LAs, WTB	NPA	Annual	Low
MA6	Seek support from the Wales Tourist Board to extend the Walking Wales campaign to offer effective promotion of the moderately challenging walking in the Brecon Beacons	NPA, LAs	WTB	Y2	Medium
MA7	Support joint private sector initiatives in developing and marketing new walking tourism products that meet BBNPA criteria (initially ABO BootsBikesBunkhouses initiative/WTB Joint Marketing Fund)	WTB, ABO	NPA	Immediate	Staff time
MA8	Develop a 'Country Walking' supplement or feature with set of walks above (PD4), with aim of encouraging off-season short breaks; boost with insert of accommodation offers in SE and M4 corridor.	LAs, RTPs, PS, CW	STP/WTG	Y2 autumn	Medium
MA9	Promote guided walks programme through tourism enterprises with longer stays	BBHC, caravan sites	NPA	Annual	Staff time
MA10	Ensure that Beacons Way is included in all listings of promoted routes	LAs, RTPs, WTB, NPA	BBPS	Y1 →	Staff time
MA11	Include selection of walking events in proposed 'Festival of the Great Outdoors', including demonstrating potential of GPS and PDA	Commercial sponsors	NPA/TGA	Y1 of FGO	Staff time

¹ Low = £0 – £9,999; Medium = £10,000 - £45,999; High = £50K+

ACTION NUMBER	ACTION	POTENTIAL PARTNERS	LEAD PARTNER	PRIORITY	LEVEL OF RESOURCE REQUIRED ¹
6. MONITORING (MO)					
MO1	Design and implement a monitoring programme specific to measurement of performance and impacts of walking tourism (building on NPP6 above)		NPA	Y1→	Medium
MO2	Recruit amongst tourism enterprises and walking tourism hub communities to establish a network to monitor path condition on routes promoted to visitors.	WTG, WTHs	NPA	Y2→	Staff time

ABO	Association of Bunkhouse Operators
BBHC	Brecon Beacons Holiday Cottages
BBPS	Brecon Beacons Park Society
BIS	Biodiversity Information System
CW	Country Walking
FC	Forestry Commission
LAs	Local authorities
NPA	National Park Authority
NPICs	National Park Information Centres
NT	National Trust
PS	Private Sector
RTPs	Regional Tourism Partnerships
STP	Strategic Tourism Partnership
TGA	Tourism Growth Area
TICs	Tourist Information Centres
WDA	Welsh Development Area
WTB	Wales Tourist Board
WTG	Walking Tourism Group
WTHs	Walking Tourism Hubs
WW	Welsh Water

¹ Low = £0 – £9,999; Medium = £10,000 - £45,999; High = £50K+