

Developing walking holidays in rural areas

Guide on how to design and implement a walking holiday project



LIAISON ENTRE ACTIONS
DE DÉVELOPPEMENT
DE L'ÉCONOMIE RURALE

LINKS BETWEEN ACTIONS
FOR THE DEVELOPMENT
OF THE RURAL ECONOMY



COMMISSION EUROPÉENNE
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**Guide on how to design
and implement
a walking holiday project**

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[2] Created in 1993, the *Agence française de l'ingénierie touristique (AFIT)* is primarily involved in adapting holiday products to changing consumer tastes in an effort to better satisfy demand, to cope with international competition and to make products more competitive. In partnership with public or private structures, it performs market analyses, publishes recommendations, provides know-how and working tools and lends assistance to project holders.

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Walking holidays, an opportunity for local development

Long underrated or ignored, walking holidays are seen today as an ideal way of developing local tourism. Walking draws its strength from a wide-spread following throughout Europe and has evolved from an informal recreational pastime into a real tourist product with potential for generating local economic benefits.

Walking was initially an activity carried out by city people through clubs and associations, who turned the footpaths into an ever-expanding recreational area. Their only criterion was to get pleasure out of walking and to rediscover paths condemned to disappear because of changes in the local agriculture and rural economy.

Intensive urbanisation in the 1950s provided the opportunity for a few visionary rural development operators to capitalise on city people's thirst to escape and explore open spaces, confined as they were to a world of asphalt and concrete. The circle of fans grew and an initial non-commercial pastime became (at least in part) a tourist activity. Today there are millions of people that take to the footpaths every year; armed with maps and following the signs and waymarks placed at regular intervals along the routes.

Walking is especially important given the very large number of rural areas with development potential and the suitability of this form of tourism for a sustainable development strategy.

The purpose of this document is not to provide a detailed analysis of walking as a form of tourism but to present key elements that can stimulate debate. The main focus here is on walking holidays as a way to provide: better management of the local tourist sector, new types of job-creation, development of new alternative local perspectives and as a means to developing a new dynamic between local players.

But before embarking on a project to develop walking tourism, the local actors should first take a hard look at what this kind of activity implies. Even with a big demand, walking holidays can prove ill suited to local

needs and may be only partially able to fulfil tourists' expectations. So the first step is to decide whether the region has real tourism potential.

The local actors should not fool themselves. The strong demand, the apparent simplicity of the activity and the unobtrusiveness of the facilities does not mean that they can just sit back and take it easy: the development of walking holidays requires strong involvement from all local actors, private and public.

Walkers as tourists "consume" more than just a footpath. They're interested in the whole area: its scenery and regional identity, its different routes and services: before, during and after the walk.

Local actors have to decide on how to:

- > target a specific customer group in this very segmented market;
- > design a coherent total product;
- > carefully develop unobtrusive facilities, mark out footpaths and provide information; and
- > set up appropriate services.

In the end, they have to sell their product as part of a package^[3], through channels that are currently experiencing rapid change. But the most delicate part is marketing this informal tourist product*. The customer wants to choose from a list of options and create their own "go-as-you-please holiday"*. This asks for a down-to-earth but also imaginative approach, in a context where profit margins are generally low for each of the economic actors.

[3] see the "glossary" at the end of this publication.

Part 1

**Designing
and implementing
a walking project**

Chapter 1

The client group

Walking is an activity enjoyed by a large number of people in all developed countries. The figures available for various countries testify to this: 3 million “committed” walkers in Italy and France, 10 million in the United Kingdom, etc. Other statistics confirm the importance attached to the activity: 30% of the people in Sweden take walks in the forest and along footpaths, half of the people in the UK walk from time to time, and so on.

Another feature largely shared is the **sharp rise** in this form of recreation in all countries.

This growing popularity is unprecedented in recreational activities. But we will see later that the word “walking” can have **several meanings**, referring to anything from a leisurely stroll to serious hiking.

Walking and hiking are **important recreational activities for European tourists** during their summer holiday. According to a survey by the English Tourist Board, 80% of tourists go on walks during their holiday without considering themselves “walkers”. In winter, many people take walks on snow-covered trails in the ski resorts of Austria and Germany, and the trend is now starting to appear in resorts in France as well.

1.1 The typical walker

Given the large numbers who practice this form of recreation, every category of the population is represented and so the typical walker does not exist. However, there are some major trends:

- > Strong presence of women (they account for 50% of the walkers in Germany, even more in France);
- > Development of family walks;
- > Popularity of walking for the over 50's;
- > Identification of walkers and hikers with middle and upper classes.

1.2 Types of walks

The meaning of the word “walk” is very broad. Some languages have several words for different kinds of walking. There is:

- > walking for several days along a route (trekking) as opposed to day-walking (rambling),
- > walking on hilly terrain or at a steady pace (hiking) as opposed to walking at a leisurely pace (strolling) or what the French call, for example, the “petite randonnée”*.

There are a lot more walkers and ramblers than there are hikers and trekkers. Available figures for the different countries show that half of “walkers” only walk from time to time and for short distances.

For the overwhelming majority, walking is a recreational activity and not a sport.

Therefore, usually their walk is:

- > short (2 to 3 hours of easy walking);
- > and forms a circle* meaning they return to the point of departure.

On the other hand, “hikers or trekkers” only make up 10 to 15% of walkers in the UK or France. Although this category of walkers has become the minority, it is in no way on the verge of disappearing. Every year, 8,000 to 10,000 committed hikers from countries around the world trek along the challenging GR 20 long distance footpath in Corsica.

The great majority (**90 to 95%**) of walkers are **autonomous***, meaning they go out on their own and not with a package trip*. This is an important point to remember: the “walking” product must not be seen only as part of a package*.

The percentage of organised walks increases considerably when they are in a foreign country. The figure varies depending on national habits: the Germans, for example, buy more package trips* than the French, who are less fond of the idea of organised holidays.

During their stay, most of the walkers also enjoy other cultural or recreational activities.

1.3 Motivation

Unspoilt Nature

Nature-related factors are always present: the search for an unspoilt and well-preserved environment, the chance to contemplate beautiful scenery. The Germans, Austrians and Scandinavians in particular value this factor.

But the relationship with nature can be paradoxical: not everyone likes the “wilderness” where they may feel disoriented and rapidly begin to worry and become stressed. People who walk are not looking for risks.

A sense of regaining physical wellbeing and fitness

The search for a sense of physical wellbeing is always present among walkers. Walking is a way of making a **moderate effort**, without trying to compete or attain a level of performance and without being confronted with a difficult environment, compared to that experienced by mountain climbers. There are no bad side effects, unlike jogging. Women and older people are particularly motivated by this idea of physical wellbeing and staying fit.

Discovery

Discovery is part of walking. **People walk to discover a region**, different ways of life: the natural, cultural and historical heritage. Anything can be a pretext for discovery, or almost, provided that the object of the discovery is close to nature and “authentic”: witness the success of walks to mountain farms where walkers can try the cheese or enjoy a piece of tart, or the discovery routes that cross valleys and villages.

However, this curiosity should not be exaggerated: for most walkers and hikers, this motivation is real but secondary. People do not go walking in Sardinia to learn about the history of the nuraghi^[4], but once there they like to visit the nuraghic sites and to learn more about the subject during their walk.

[4] Sardinia is the land of the “nuraghi”, Bronze Age truncated cone structures of rectangular blocks of stone built without any bonding. About 7 000 nuraghi have been documented on the island.

Not doing what everyone else does

For some, walking can also be an “intelligent” way of spending a holiday, of being what the Germans call “critically alternative”. It is a form of **cultural differentiation**.

Final remark on motivation:

If walking or hiking is more a form of recreation than a sport, those who engage in it seem to be extremely attached to it. This means that **walking enthusiasts will not be tempted to go to an area, however beautiful, if there are no trails or footpaths where they can walk.**

WHO ARE THESE WALKERS AND WHAT KIND OF WALKS DO THEY TAKE?

Despite the large numbers who walk, there is still not enough information about them.

While the problem of better defining the differences between walking and hiking can be solved, there still remains the problem of **determining who the walkers are and what kind of walks they take**: there is no toll booth or device at the entrance of footpaths to count the number of walkers, no truly compulsory material or equipment whose sales figures could serve as indicators for the market as a whole, compared to skiing or cycling. Finally, the terrain covered by walkers, the footpaths and trails, is virtually endless and scattered.

The only available sources for a better understanding of this market remain **public surveys**.

National surveys take a large representative sample of the national population. They are a good way of understanding the overall market of a country and especially of observing changes if the surveys are repeated on a regular basis in a way that they can be compared. They are, however, cumbersome and expensive and do not provide a very finely tuned analysis: if the sample surveyed is 1,000 people, half of whom say they walk, the customer niche* that will be of interest to a producer* or an area will be reduced, for example, to 500 persons x 3%, or 15 people.

Less costly, local surveys are often full of lessons. They provide a better picture of the customer base, its behaviours and its expectations. These surveys have to be done in part in the local area itself and according to a very precise methodology in order to avoid erroneous results: in addition to the usual questions

asked at the car parks where walkers leave their vehicles, the people conducting the survey also have to be posted at specific points along the walk (for example, at a distance of 1, 2 and 3 hours from the departure point and at places where paths cross). The accommodation can also be a good place to do a survey of a certain type of customer. The periods when surveys are carried out also need to be diversified: during the high season the entire customer base (international, national and regional) will be reached, while in the off season it will only be possible to determine the weight of the regional customer base. The survey should also be done on different days of the week. It is better not to use questionnaires that the walkers fill in themselves and over which there is no control. However, the questionnaires should not be too long, otherwise the people being surveyed during the walk may "switch off" before the form is completed.

To be reliable, the entire operation requires a relatively large amount of time per investigator: the survey should take the equivalent of 4 to 6 days, and there have to be enough investigators to avoid double counting. A special counting device specially adapted for trails and footpaths now exists, and it is automatic, inconspicuous and silent. It is one way to determine the flow of walkers.

These surveys are especially interesting if they can be incorporated into a picture that shows the situation over a longer period of time and for a larger area. The three French National Mountain Parks came up with a common procedure to study flows and survey walkers, repeating these surveys periodically.

Partnership with universities over survey methodologies and analysis of findings generally proves beneficial for both sides.

See "Assessing local tourist potential" published by the LEADER European Observatory, factsheet 8 on "Documentary Research".

Chapter 2

Main components of a walking holiday product

Say the word “walking”, and the word “itinerary” springs to mind. In addition to its “natural” image, a walking itinerary is a genuine infrastructure, designed and set up as such, and it obeys certain rules that will be discussed later. Once the itinerary is created on the ground, other facilities, often limited but sometimes substantial, will have to be developed.

2.1 Basic ingredients

- > To begin with there are several types of **walking tours**:
 - Itineraries lasting several days, like a trek through the mountains or a journey across a region. These are often the best way to discover a region but sometimes pose the problem of the return to the departure point;
 - Big circular walks* lasting several days, without the above mentioned drawback * Day itineraries, which can be more or less long.

Ideally, a network of several itineraries should be designed to give walkers the maximum number of possibilities.

- > **Services for walkers** are the second component of the product. Because the walkers are tourists, the basic services are traditionally accommodation, eating places and transport. Other services can also be provided such as guided tours or the transfer of baggage. The current trend is to develop more and more services for walkers.
- > **Information** about the walking itineraries is part of the product. In a way, the itinerary does not exist for the walker if there is no information. All along the walk the walker, more or less systematically, finds signs and waymarks. In addition, there are other sources of information. Before there was the topographical guide and now there are Web pages and CD-ROMs.

- > All these components take on meaning in an **area**. **The area is in fact the decisive ingredient**: the walker does not just walk for the pleasure of walking, and the walk becomes meaningless if it is not in an area that has been specifically developed for such a purpose. The walkers have particularly high expectations of the area.

There are a thousand and one ways to organise an area, but it has to have a real potential for tourism. The quality and diversity of the landscapes, the wealth of the natural heritage, the strong presence of local traditions and an important historical or cultural heritage are basic assets. **A well-respected and preserved environment also becomes a decisive criterion in the area’s image.**

See *“Evaluating the tourist potential of an area” published by the LEADER European Observatory, factsheet 13 “Checklist for the stock of local tourist products”.*

2.2 A complex and composite product

The list of these ingredients shows that the product is made up of various types of elements. That is the main characteristic (and problem) of walking holidays. Some of these components are non-commercial: trails and footpaths, scenery, nature and heritage are part of the common assets of a region or even a country. These elements are sometimes difficult to quantify and to manage. Responsibility for their management is often shared between the various local and regional authorities, the non-profit making sector and private actors: the landscape or network of paths is the best example of this. They are nonetheless the very foundation of a walking product.

In addition to this non-commercial sphere there are all kinds of commercial goods and services: accommodation provided by professionals but also by individuals or farmers, and also maps and walking guides, transport, and so on.

The nature of the activity, which takes place over a large area, adds to the complexity. It is therefore necessary to think in terms of a “network”, which has to be integrated and coherent. The management of this multi-faceted product is especially complex, since the demand for it is extremely fragmented.

These thoughts have some concrete implications:

- > The implementation of a walking holiday strategy is not possible without “coordination” between all players, private and public. Is it possible to have a walking holiday project, however well integrated, if the scenery in the area is damaged by, for example, a large-scale redistribution of the land?
- > A walking project cannot be grafted onto an area. Doing so would create a product that is totally isolated and disconnected from the local circuit;
- > Some of the “inputs” of the walking product are part of the collective good. Because they are not items in the operating account of a product, they are not subject to any direct economic development. Their implementation is part of local development.

Chapter 3

Embarking on a “walking” project

As with any development project, a certain strategy has to be followed between the first idea and the carrying out of an action plan: analysis of the assets and weaknesses, evaluation of potential, etc. Without reviewing development project methodology completely, certain recommendations specific to walking can be made.

3.1 Key partnerships

Because the walking holiday product is made up of public and private components, a **close partnership** is essential early on in the project to define strategy and develop an action plan.

Depending on how each country is organised, the debate is launched by **local authorities, development agencies, associations or “private” individuals**.

In Auerbergland (Bavaria, Germany), a vast network (800 km) of walking and cycling itineraries was created following an action plan involving all players.

Since 1995, the LEADER group of Arbeitskreis Auerbergland, working as an association, has mobilised 500 people to come up with ways to develop their region, through the organisation of 60 voluntary working groups.

*The initiative to create a network of itineraries came from the working group on “tourism” within the Auerbergland Verein association. This working group consisted of local hotel and restaurant owners, the LAG and individuals, notably a landscape architect. The LAG coordinated the project. The area’s 9 local authorities were then responsible for development and implementation (see **factsheet-example 5**).*

Whatever the situation, all the institutional players, tourist structures and service providers must be involved in the debate.

LEADER local action groups can play an important role in creating a dynamic and stimulating debate.

They can also act as a go-between and mediator between the players.

The LAG, go-between and mediator

*In Crete (Greece), the Temenos-Pediados LAG plays an important role as intermediary. It organises working days for LEADER end-beneficiaries who have projects and the other local tourist operators, to inform them of current area planning developments and of new tourism-related projects. It also helps them find complementarities between the different sectors (tourist agencies obtain information on self-catering cottages or on producers). It also plays a mediating role. After hearing all the problems that the local tourist operators encounter on the ground, including legal obstacles, the LAG tries to maintain contact with the government agencies concerned and to promote some of the operators’ suggestions (see **factsheet-example 3**).*

In the early stages of development, it can be helpful to work with an **external expert**. This has the advantage of providing a fresh look from a detached vantage point. The expert also shares experiences he or she has gained in other regions and countries. This person can therefore provide new ideas.

See “Evaluating the tourist potential of an area” published by the LEADER European Observatory.

AN INTEGRATED, SECTOR-BASED APPROACH

With its many years of experience in France, the “Grande Traversée des Alpes” association helped start up a younger “sister” in Morocco, the “Grande Traversée de l’Atlas”. The objective was much more than developing itineraries. It was to design and implement a genuine local development project involving several sectors. The main achievements were:

- > Creation of basic infrastructures;
- > Opening a Training Centre for Mountain Professions;
- > Organisation of a network of mountain lodges;
- > Development of traditional economic activities.

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Local experts are also essential when analysing the region's potential because of their detailed knowledge of the area. When they exist, **local walking clubs** are a good source of information and should be included in the working group. If walking is not usual, there are always those who for professional reasons or because they are outdoor enthusiasts have covered local trails and footpaths extensively.

In regions where tourism has still not been developed, **foreign tour operators*** sometimes provide the expertise or stimulus for the project.

In Dorgali (LEADER area in Barbagie, Sardinia, Italy), the idea of creating an experimental tourist product arose from the encounter between an official responsible for tourism from the province of Nuoro (main promoter of the Park's creation) and a Dutch tour operator specialising in green tourism and walking. This meeting took place at the Environmental Tourism Fair that was being held in Cala Gonone near Dorgali (see factsheet-example 2).

3.2 Developing the project

Why devise a development plan for walking holidays? The reason behind the initiative can be extremely varied:

- > To create a new activity in an economically underdeveloped region.
- > To offset the decline in traditional economic activities (agriculture, fisheries).
- > To replace traditional tourism, on the wane, with a new dynamic form of tourism.

Tourism in the region of Dorgali, in Sardinia, was centred on the coast. The diminishing popularity of beach holidays among tourists and the creation of the Genargentu National Park led the local officials to come up with another form of tourism in the island's interior that could act as an alternative to, but remain compatible with, the coast (see factsheet-example 2).

- > To derive more economic benefit from an already existing walking activity.

In the LEADER area of West Cornwall (England, United Kingdom), where tourism is already well established, walking was popular among many of the visitors but generated little income for the local economy. Most of the walkers concentrated on one or two itineraries, but these lacked tourist facilities. The cost of maintaining the itineraries was also very high. Following an evaluation it was decided to develop a walking holiday product in order to:

- > create a new source of added value;
- > attract more tourists in low season (see factsheet-example 7).

Comparable action was taken in Wallonia (Belgium) where the Grande Traversée des Ardennes was created. The aim was to set up permanent itineraries for local walkers and create facilities to increase the customer base (see factsheet-example 8).

- > To manage tourist flow in time and space.

Listed by UNESCO as "World Heritage of Mankind", Hadrian's Wall, which marks the border between England and Scotland, is visited by 1.25 million people a year. But the flow is difficult to manage. A National Trail along the Wall is currently being built in order to limit the impact of too many visitors and to avoid damage to the archaeological sites and scenery while making it more attractive for visitors.

The trail will rationalise the flow of visitors by following the entire length of the Wall thus reducing pressure on the most popular parts. Loops connecting parts of the trail with the railway station and bus stops are also planned so the visitors can enjoy the surrounding countryside.*

- > To engage in sustainable development by promoting a form of environmentally-friendly tourism.

> To ensure the continued protection of local heritage by giving it a tourism-related purpose.

In the Virgental (Tyrol, Austria), the low stonewalls, which were part of the traditional landscape, were under threat. It gradually became clear that they had to be saved, and the creation of a footpath across these traditional fields looked like the best way to protect these parts of the landscape.

The first step is to do an **appraisal identifying the area's resources and shortcomings**.

An analysis of the area's potential first looks at the conventional aspects such as the customer base, accessibility and heritage.

Elements specific to walking holidays also need to be examined. These include:

- > Quality of the environment, which is becoming an increasingly important criterion;
- > Importance of natural environment;
- > Presence of protected natural areas, as a focus of attraction;
- > Diversity of scenery in a small area, changing at the pace of the walker (the landscape can soon become monotonous);
- > How well known the area is (an area that is known to a "select few" can be an asset);
- > Presence of local walkers, favouring the maintenance of the infrastructures and services, gives the project a better chance of local acceptance and facilitates communication between visitors and the area's residents.

This appraisal sets the stage for **targeting the customer base**, taking into account the area's tourism potential, specific objectives and analysis of the competition.

In a very segmented market, this targeting is essential. While it is quite natural to sometimes dream about the foreign customer base, even thinking it will be possible to attract American tourists, the most obvious market with most potential is often the regional or national customer base.

See **Evaluating the tourist potential of an area** published by the LEADER European Observatory factsheets 2, 3 and 4 on the analysis of demand, supply and competition.

WHICH MARKET?

In the of West Cornwall LEADER area (England, United Kingdom), the target is not the dedicated walker who is extremely autonomous and consumes few services, but occasional walkers who will consume more services and activities (see factsheet-example 7).

The region of Molina de Aragon Alto Tajo, near Madrid, Valencia and Alicante, identified its target as a nearby urban customer base consisting of small groups or families interested in short stays (see factsheet-example 4).

In the Belgian Ardennes, walking clubs were the first customer base targeted. However, these did not provide sufficient customer base for organised walking trips lasting several days sold as packages with services. Therefore, a way had to be found to broaden this initial customer base. The organisers looked in the direction of individuals or small groups who walk occasionally (see factsheet-example 8).*

Once the customer base has been targeted, it then becomes possible to develop relevant products, suited to the needs of the walkers identified. The organisers are able to decide on:

- > Itinerarie Design (length, location, etc.);
- > Services level*;
- > Type of services offered (with or without assistance).

This positioning will also determine the marketing conditions for the products. At this stage of the discussion, it is a good idea to look at the most appropriate distribution channels and possible partnerships.

3.3 Setting up the “production line”

Once the major guidelines have been defined, an action plan has to be drawn up. It is necessary to define objectives for each walking product component, list the actors and assess the method of implementation.

In particular, **the implementation of the development project has to be planned** and answers have to be found to a number of questions:

- > Who is going to manage the itineraries network?
- > What kind of training is going to be needed? Are the necessary tools worked out?
- > What has to be done to bring accommodation and means of transport up to standard?
- > How are service providers going to organise themselves to offer the best product and maximum economic efficiency?
- > Who will take care of promotion and marketing?
- > Should the region have its own label?

The aim, therefore, is not so much to plan everything but to encourage the players concerned to organise themselves and take responsibility for the various actions. **Training plays a very important energising role here**, by helping to professionalize the actors, by concretising the project “philosophy” and by creating opportunities for the various parties to meet and work together. The training should not only provide qualifications for walking-related jobs or teach those providing services about walking holiday products, it should also instil, if needed, a “walking culture” in the various professionals in contact with the customer base: it is difficult to imagine a hotel where walkers stay but where the manager or part of the staff are not familiar with walking and the local itineraries.

The “Landsker Borderlands” project (LEADER area in South Pembrokeshire, Wales, United Kingdom), aimed at creating new walking itineraries covering the entire region and made training actions an important part of the process. There were courses in: history and interpretation of local heritage, construction and restoration of buildings, creation of trails and footpaths, how to repair bridges and walls, restoration of small heritage buildings and signposting. Training in “management of a tourist business” was particularly encouraged and made compulsory for participants applying for a grant to improve facilities. Courses on the use of new technologies (particularly IT management) were also organised (see fact-sheet-example 6).

At what level should the work be done?

If, generally, the local authority level is rarely relevant for a tourism development project, it is even more inappropriate for walking where administrative borders are of no importance due to the amount of territory covered. The first criterion will be the coherence of the area, which has to be a tourist entity. The question that then has to be asked is: at what level does an area become “readable” or visible for the potential tourist?

Once the idea has emerged, how long does it take to finalise the product?

Two years seems to be the minimum and in some cases up to five years may be needed.

THE “PRODUCTION LINE” IS READY

In Wallonia (Belgium), the Grande Traversée des Ardennes, actually consisting of 4 different walking itineraries, was created to derive economic benefit from an already existing activity.

The production process was clearly identified:

- 1. The “GTA-Belgique” Association was set up in 1988 to develop the network of existing trails, ensure maintenance, encourage creation of gites along the itineraries and to offer walkers services such as tours by trained guides, the transport of baggage, accommodation and meals. GTA-Belgique also publishes books and maps of trails and designs walking holiday products. The Grande Traversée des Ardennes is a member of the international network of the “Maison de la Randonnée”, created in France by the “Grande Traversée des Alpes” association.*
- 2. “Europ’aventure”, a local tour operator specialising in walking holidays in the Ardennes, designs and markets individualised products* and nature adventure products.*
- 3. The Fédération des gîtes de Wallonie / Federation of Gites of Wallonia and the hotel sector provides walkers with accommodation services. They also serve as an intermediary for the customer base and provide an information service. Over one hundred service providers have been involved in the project.*
- 4. People operating tourist attractions along the itineraries were also contacted to offer an additional service to people passing through the Ardennes who could use a special “passport” to discover the region.*
- 5. The regional forestry agency (DNF), the 23 local authorities concerned and the local tourist information centres have collaborated on the project, obtaining permission to cross certain areas, post signs and provide information to customers about the project (see factsheet-example 8).*

Chapter 4

Facilities and services for walkers

It takes a lot of behind-the-scenes work to organise a setting where this specific category of tourists can enjoy discovering and savouring an area at their own walking pace. That is the paradox of this most simple of human activities which consists in putting one foot in front of the other.

4.1 The legal framework for developing footpaths

The legal status of trails and footpaths

The walking itinerary is not a legal entity in itself: an itinerary follows routes, which are regulated according to the status of the land and the purpose assigned to the route.

The first question that needs to be asked when creating itineraries is the status of the routes covered: does the planned itinerary follow private or public paths? Even when the paths are public, are walkers allowed on them? The legal framework governing the walking itineraries can vary from country to country, in accordance with the specific aspects of property law and the system of rights of way. **Walking project managers will always have to perform close, detailed analysis** of these legal constraints. Whatever the nature of the paths comprising the itineraries, **it is highly recommended that planning and development work be done by the same public entity**, normally the local authority (municipalities, intermunicipal structure, district), ensuring rigorous and coherent organisation of this fundamental aspect of itineraries creation.

It is better to focus on public paths...

In principle, public paths are accessible to walkers, except in obvious cases like heavily travelled roads.

However, it is important to know if local footpath access may be restricted. In France, for example, roads in public forests (belonging to the State) are for forestry. Public access is at the discretion of forests managing body.

... and obtain formal permission to use private paths

Walking on private roads or across private land, although not impossible, is more problematic as the owner or operator of the land has to give his consent. If the owner refuses access, then it remains to be seen if there are any legal means to force him to do so, bearing in mind that this course of action may involve a lengthy court battle. In France, for example, an unwilling owner cannot be forced to provide access to his land.

Even in cases where the owner gives permission, it is always better to get formal backing for this consent by establishing a right of way.

This agreement, duly drawn up and signed by the two parties, the owner and public body, establishes the rights and obligations of each side, particularly with regard to:

- > Improvement work (who builds the steps over fences, for example?);
- > Path usage (will uses other than walking, such as horseriding, be allowed? Etc.);
- > Path's maintenance (who will do the clearing work?)
- > Insurance.

The process of setting up paths in Cloghane (LEADER area in Meitheal Forbatha na Gaeltachta, Kerry, Ireland) included consultation with local farmers. The 50 farmers affected by the itineraries were asked to give right of way to walkers crossing their fields. Ladders were built over the fences to enable easy crossing and to prevent damage. Agreements were signed to cover damage by walkers (see factsheet-example 1).

What happens if there is an accident or damage on a walking itinerary?

More and more this question arises, given the growing trend in Europe to assign responsibility and claim damages. A few general principles should be stressed.

In case of accident, responsibility may be assigned to the user, the owner, the planner-developer and the local authority:

- > A walker may be held accountable for his behaviour if he causes damage or harm to property or persons.
- > The owner of private property may in certain cases be found liable, on the basis of the principle that an owner is responsible for his property.
- > The planner-developer of the path may have to answer for failure to ensure the walkers' safety because of shoddy or inadequate work, or poor judgment of objective dangers or of risks facing the walkers.
- > Theoretically, the organisation providing information about a path or trail (topographical guide, map, signs, etc.) may be found at fault for delivering erroneous or insufficient information.

The agreements on right of passage generally stipulate that the local authority replaces the owner in assuming any third-party liability by the owner, and will take out insurance covering any damage caused by the walkers.

However, for criminal responsibility, whether there is an agreement or not, the various parties involved remain answerable for their acts.

Lastly, whatever their role in planning and developing the itineraries, the local authorities' first and foremost concern is generally people's safety. They have to use their police powers to this end.

These general rules must be read in the light of the legislation and regulations specific to each country. They especially have to be interpreted on the basis of case law: responsibility is determined in part by earlier court rulings, which set a precedent.

It is up to each actor to check **the situation concerning responsibility** in his country and to take the necessary precautions without becoming overly cautious to the point of not being able to achieve anything.

What can be done to protect trails and footpaths and to ensure their continued existence?

Trails and footpaths are, as everyone knows, fragile. If neglected, they are invaded by overgrowth or ploughed under by the farmer. Sometimes, fences will bar the way. Elsewhere urbanisation or road construction will eliminate this "worthless" path.

Each country is debating what steps to take to maintain its network of trails and paths for future generations. France is trying to have roads used for pilgrimages to Santiago de Compostella declared part of the Heritage of Mankind. The United Kingdom has its very successful National Trust. The means used to ensure that a path continues to exist in the future varies depending on case law and countries and may include property management or registration of the path's purpose in regional planning documents.

4.2 Designing walking itineraries

The people who know all about the land and walking in the area are the ones who should **design itineraries**. Walking clubs or federations can often be of considerable help and are worth consulting for this phase. It is important to make sure that the proposed itineraries match the specifications (type of tours, use of heritage, accommodation along the way, maximum length of itineraries).

Choosing the walking route

A whole range of criteria comes into play when defining a route. However, some basic rules need to be remembered:

- > Exclude asphalted roads unless very for short stretches;
- > Try and diversify the route;
- > Maintain the same level of difficulty for the whole itinerary;
- > Do not overestimate the walkers' ability to orientate themselves and to change directions;

- > Seek out beautiful scenery and quality environment;
- > Take advantage of the region's heritage: natural wealth, religious monuments, traditional dwellings, etc.;
- > Anticipate the impact of itineraries, avoid environmentally sensitive areas;
- > Rule out potentially dangerous sections.

The routes will sometimes be designed directly from the established objectives and customer base targeted.

In the West Cornwall LEADER area (England, United Kingdom), where the walking project was aimed at occasional walkers, the tours were no longer than 18 km, a good half-day's walk. The itineraries were designed to include restaurants and tourist sites along the way so that walkers could visit sites in the afternoon after the walk. Finally, the itineraries must be spread out in such a way that each visitor can do several walks from his accommodation point, encouraging him to stay longer (see factsheet-example 7).

Should the itineraries only be for walkers?

There is a fundamental incompatibility between walking and recreational activities based on motor vehicles.

In some countries, the relationship with hunters can also be a delicate one, making consultation essential and sometimes necessitating the restriction of access to sections most exposed during the hunting season.

When walkers and people riding horses or mountain bikes share the same paths, the risk of an accident occurring depends on how intensively the path is used and the nature of the terrain.

On the other hand, there are cases where multipurpose paths are appreciated because of the increased amount of activity and the opportunities they provide to meet others.

4.3 Preparing the itineraries

Usually, the itinerary will follow already existing paths.

A brand-new path will seldom have to be created for a walking itinerary, except, for example, when two sections or paths have to be connected, or the original path has physically disappeared because of human intervention (asphalting, ploughing) or for natural reasons (landslides).

But improvement work on the path will often be necessary to adapt it to more intensive walking:

- > Clearing and trimming;
- > Strengthening path's foundations;
- > Drainage;
- > Laying gravel;
- > Repairing small walls;
- > Footbridge construction

Additional facilities may also be needed for the itinerary:

- > A car park at the start of the path (it must be easily accessible and not disturb the area's inhabitants and environment);
- > Dustbins;
- > Picnic areas;
- > Ladders to cross fences.

4.4 Signs and waymarks

The itineraries have to be marked out, except in the case of guided tours.

There are several ways to mark trails and footpaths:

- > Painting objects already there (trees, rocks, poles).
This is the most common form;
- > Putting up pictograms or coloured plastic forms on poles; or simply by,
- > Piling up stones in a heap as a landmark (a cairn).

The most important and hardest part of the task is **first to define a waymarks charter** covering the whole area. Without a charter, markings of all forms and colours risk being used, eventually becoming incomprehensible for the user. This proliferation of signs is a real risk, especially considering other activities like mountain biking and horse-riding that also have their own markings.

Some European countries have adopted charters for markings but these are not always mandatory. Belgium has labelled certain signs, by official decree, which clears the way for public funding. The international standardisation of waymarks remains to be finalised.

Directional signs, widespread in Switzerland and Austria, can be an alternative to waymarks. At each junction, arrow signs indicate the name of the next point and its distance, as with roads. This system avoids an overlapping of waymarks. However, it requires a lot of work to install and is quite expensive.

Other signs can be added to complement the whole, beginning with a board sign at the departure point showing a general map of the itinerary, the waymarks code, duration and distance, the rules and regulations and tourist information.

AN OFFICIAL WAYMARKS CHARTER IN FRANCE

To put an end to the proliferation of all kinds of waymarks in France, the actors concerned with outdoor pursuits came up with a common waymarks charter.

The primary interest of this document is its adoption by all involved parties:

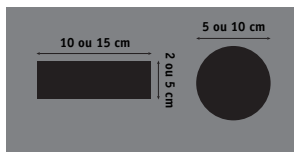
- > The State (Ministries of Agriculture, the Environment, Tourism, Youth and Sports, and the Interior);
- > Recreation and Leisure federations and associations representing all non-motorised outdoor activities (horse-riding, cycling, bicycle touring, mountain climbing, cross-country skiing);
- > Territorial actors (National Parks, Regional Nature Reserves, National Forestry Board).

However, the Official Waymarkings Charter is not legally binding or regulated: observance depends only on the goodwill of the actors. More than anything else it is a code of good conduct.

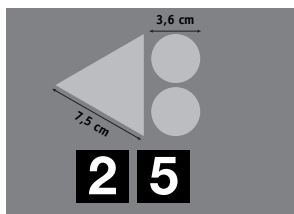
The rules laid down are simple:

1. Each form of recreation (biking, horse-riding, cross-country skiing, etc.) has a specific waymark code;

Waymarking of equestrian trails

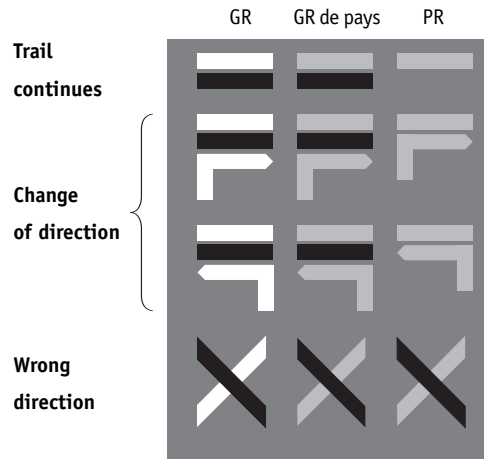


Waymarking of mountain bike trails



2. Where itineraries share several recreational activities, waymarks used for walking apply;
3. Painted waymarks are recommended.

The document also recalls that some names and certain graphic codes are registered trademarks and protected under industrial property laws. In France, for example, the "GR" or "Grande Randonnée"* and "PR" for "Petite Randonnée" cannot be used without permission.



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The Charter also has very precise technical specifications regarding form, colour and size of markings.

The charter has unquestionably helped standardise the signs and waymarks, in terms of their application along the itinerary and in making them less unsightly. However, other waymarks are still used, particularly by territorial actors (National Parks, Regional Nature Reserves), which want to indicate specific features of their area.

4.5 Maintaining trails and footpaths

Maintenance on trails and footpaths is essential for the continued existence of the itinerary and for the walkers who want a good product.

With regular and/or seasonal interventions it is possible to keep paths clear of overgrowth, check their condition and replace missing or damaged signs and waymarks.

In countries where walking is a popular form of recreation, the non-profit sector traditionally does a certain amount of maintenance. But, fundamentally, **the local authorities are responsible for the maintenance of this tourist infrastructure** and can in certain cases be assisted by authorities higher up (regions, departments, counties, etc.). Often people in back-to-work or social inclusion programmes do this type of maintenance work.

4.6 Cost of developing and maintaining a path

It makes no sense to try and estimate development costs, given the many variables and resulting differences that exist even within the same country. According to a survey done in France in 1993, the cost of creating a path varied between EUR 25 and EUR 2 000 per kilometre^[5].

At best, we can examine the main factors that will determine the final cost:

- > Original state of the path to be included in the itinerary - a path that has disappeared and needs to be recreated or that has been severely eroded will require more work;
- > Location of the itinerary - paths in the mountains or in areas close to cities are particularly expensive, for different reasons. In the first case, there is the problem of transport (the equipment often has to be carried on people's backs, or in some cases even brought in by helicopter), and certain safety fixtures may need to be built, for example, for a difficult crossing. In areas close to cities, footbridges may have to be built or more signs and markings may be needed;
- > Amount of development and facilities needed - *in Wallonia (Belgium), the cost of creating a new itinerary varies from 1 to 5 depending on the waymarks, signs and the facilities needed for the path. The creation of a 2.5 km-long path for the visually impaired in Virgental (Tyrol, Austria), with 12 information boards set up at various points, cost EUR 12 000 in 1995;*

- > Method used to carry out the work - using volunteers from the non-profit sector will reduce direct costs; the cost of work done directly by public authorities is not always subject to exhaustive cost accounting.

Maintenance costs also vary widely.

It may be more relevant to talk in terms of work time needed, given that the main cost of maintenance work is labour. For example, the maintenance cost of the Grande Traversée des Ardennes paths (200 km) is estimated to be the equivalent of one part-time job.

WIDE COST VARIATIONS^[6]

Some ratios...

- > Standard maintenance (signs and waymarks): EUR 25 to EUR 50 per km;
- > Rehabilitation and new signs and waymarks: EUR 50 to EUR 100 per km;
- > Complete redevelopment of a worn-out path: EUR 170 to EUR 600 per km;
- > Opening up a new section: EUR 700 to EUR 1 400 per km (more in the mountains).

... and some examples:

- > Creation of 310 km of paths in a lowlands region (la Saintonge, France): EUR 27 000, or EUR 87 per km;
- > Creation of 360 km of paths in the French Southern Alps, on the border with Italy: EUR 353 per km.

There is also the cost of overseeing the whole operation: in Wallonia, for example, the design, surveying and coordination costs for the development of 200 km of paths in the Ardennes represent about 6 months full-time work for one person.

[5] Source: "Guide conseil pour le développement de la randonnée pédestre" co-published by the Fédération française de randonnée pédestre (French Walking Federation) and France's regional development agency, DATAR (Délégation à l'aménagement du territoire et à l'action régionale), France.

[6] Idem.

Who pays for this work?

To begin with, the public authorities finance this, often through cross financing between the local authorities, sometimes the State. *In the case of the Grande Randonnée des Ardennes, the local authorities provided 20% of the funding while the Tourist Board paid for 80% of the work.*

Less frequently, projects receive private funding: *the path for the visually impaired in Virgental (Tyrol, Austria) was financed by private funds (47%), national and regional funds (47%) and funding from the European Union (6%).*

4.7 Accommodation

Accommodation is an important part of the walking holiday product, although it may appear unrelated to the activity itself. For the customer, the accommodation is not only a place to rest but also **an opportunity to meet other people**, and a **valuable source of information on the region**.

Although the accommodation in some countries is specifically geared towards walkers (huts or lodges), it is far from being systematically the case. However, whatever the accommodation, it must offer services* to satisfy the walkers' specific needs.

Expectations are related to the type of walking, but also to the extent of their curiosity and search for authenticity. Also, different nationalities have distinctive priorities: Germans attach great importance to cleanliness while the British look for quality service. The customer bases of Northern Europe are also very keen on finding establishments where environmental management is important.

So, **the ideal accommodation** should offer:

- > Rooms where the walkers can wash and dry their clothes;
- > A type of hospitality and availability that meets walkers specific needs;
- > Information about walking itineraries and the region;
- > Documentation on the region and its heritage;
- > Hearty meals that include local foods;
- > A big, nutritious breakfast;
- > Option of a picnic basket.

Virtually all walking holiday development plans include mechanisms to improve accommodation structures. In some cases, financial aid is granted if the person who runs the accommodation participates in a training course or agrees to improve service quality.

This is the first step towards accommodation labelling (*see factsheet-example 10*).

CAMPSITE, HOTEL, HOSTEL, CABIN, BED & BREAKFAST?

People, today, are less concerned about the category of accommodation than about the quality.

Walkers are looking for more comfort and services (meals and other services).

There is no systematic decision by walkers concerning inns or restaurant along the route. It is up to the service provider located near the itineraries to make necessary changes to attract this customer base. Walkers are particularly interested in "authenticity" for their meals. They will not want standard fare but something typical of the region.

In Bavaria, in Auerbergland, an original system was set up: walkers can order a daily supply of fresh farm products from a "catering" service, which delivers the items to the "fridge" where they are staying (see factsheet-example 5).

The walkers can also be offered other services:

- > Transfer back to departure point;
- > Forwarding of baggage;
- > Transport to train station.

These services are developing but are essentially still just offered for packaged products*.

4.8 Guided walking tours

Guided walking tours are a specific service provided in package products* or offered for day walks. The walker's satisfaction will depend, to a great extent, on tour quality.

Guide training is therefore an important part of walking tourism development plans

To take a group of walkers on a guided tour requires expertise in a number of areas.

For day walks based on a theme, the guide needs to know about the region and its heritage and be versed in the subject

For package holidays where the guide is with the group for the entire trip, the accompanying person has to lead the group along the itinerary, take care of the logistics and keep the walkers interested. While technical skills and thorough knowledge of the terrain are a must, the most important qualification is his/her ability to relate to other people. This person has to manage the group and win its attention and be prepared to take charge if a participant is not feeling well, for example, because of fatigue or stress or disorientation due to the change of terrain.

Who can accompany the walkers?

The regulations vary widely depending on the country: some require a certificate while others do not, and some make distinctions depending on the type of walk.

Because walking is often considered to have evolved from mountain climbing, sometimes only mountain guides are allowed to accompany walkers. France has created a certificate for mountain guides, which actually covers tours in all types of regions except in high mountains. Whatever the case, there is no denying that the specific nature of the national certificates continues to prevent the free movement of guides between Member States, even if in theory the free movement of workers within the European Union now exists.

Chapter 5

Information and promotion

Like with any product, information and promotion are two essential parts of the marketing operation, and walking holidays are no exception.

5.1 Information

5.1.1 Printed information

The form and quality of information documents differ according to objectives established and available budget, regardless of whether they are information sheets, brochures, photocopies or genuine guides.

The basic idea is to provide a description of the itinerary. **It has to be simple and easy to understand for a novice walker** who does not know how to use a map or read a compass. For Carefree-walking* this is particularly important, because the description of the itinerary is supposed to make up for the absence of a guide.

A final precaution: put the topographical guide to the test

When Carefree-walking was promoted in Sardinia, all the necessary precautions were taken. The local guide was asked to follow the first customers at a distance, making sure that the signs and information provided describing the itinerary were relevant.

The text also has to include a graphic depiction of the itinerary in a map or drawing. The description should have basic information like the duration and length of the walk, the level of difficulty and any necessary precautions.

More sophisticated guides will also contain information about such things as the region being covered, any wildlife and sights along the way.

Finally, the topographical guide can be like a tourist guide, providing tourist information on aspects like accommodation and transport.

It is a shame to only consider the functional aspect of the topographical guide: sold in bookshops and points of sale.

It is also a promotional tool, a showcase of what the region has to offer in terms of walking.

Who publishes and pays for the topographical guide?

Seldom does the publication of a topographical guide make a profit, except for the most popular destinations and itineraries, which then do not need a development plan. Therefore, it is unlikely that a publisher will want to take the financial risk.

In such cases, the structure responsible for walking holiday development (the case of many LEADER groups) will have to publish the guide and finance it. A private publisher can also be asked to circulate the guide (with the advantage that he will have more experience of distribution) but will have to be paid.

A topographical guide at each phase of the development plan's implementation

In the Molina de Aragón-Alto Tajo LEADER area (Spain), the publication faithfully followed the creation of the itineraries.

Step 1: Rehabilitation and marking out of 12 paths, publication of guide "Green Tourism in Scenario de Molina".

Step 2: Creation of the "Association of Rural Tourism of Alto Tajo" and publication of 3 books on walking and mountain biking.

Step 3: From the year 2000, publication of a tourist guide and consolidation of walking itineraries offered.

A publisher financed the three books on walking and mountain biking and published them in conjunction with the Junta de Comunidades de Castilla La Mancha, the LEADER II group of Molina de Aragón-Alto Tajo and the Association of Rural Tourism of Alto Tajo, which all provided support in the form of grants or the purchase of copies (see factsheet-example 4).

5.1.2 Information available on site

Local info points and information centres have a strategic role, because they are often the first point of information, before the topographical guides.

They must be capable of **correctly informing the visitors about the itineraries**, recommending the ones that best suit the needs of the walkers and reporting on the condition of the trails and paths.

For this, the staff must have a minimum amount of knowledge of the terrain. Some tourist structures once a year organise an outing at the beginning of each season for the people who work in the info points so that they can see for themselves what the walking itineraries are like. The people who provide accommodation and those who provide information in an informal manner can also be involved in this.

5.1.3 Multimedia aids

The use of multimedia aids, like CD-ROMs and Web sites, is now a widespread practice. They are proving to be a real plus for the product's promotion because of their flexible use, interactivity, graphic quality and the large amount of information they contain. However, they cannot replace printed documents and must be seen as complementary to the rest.

In Auerbergland, in Bavaria, a vast network of cycling paths and walking itineraries was set up. First available in printed form, the maps were updated and produced in a CD-ROM format in German, providing people at home with a whole wealth of interactive information to prepare their trip.

The CD-ROM is also a valuable tool for local tourist boards (see factsheet-example 5).

5.2 Promotion

5.2.1 Advertising

The advertising campaigns of tourist areas are increasingly including walking in their image to increase their appeal. But advertising campaigns devoted only to walking are less common because of the large budget required.

For an advertising campaign, the media plan should generally focus on specialised magazines, aimed at a specific audience.

The regional press can also be used if the customer base is a local one.

5.2.2 Promotion

Promotion through the press has repeatedly proven to be effective. In addition to the specialised and regional press, the national press may be interested in an original aspect of the product or an angle that appeals to its readers, as for instance the donkey trips (*see factsheet-example 11*).

Electronic means are proving to be increasingly successful.

In the West Cornwall LEADER area (England, United Kingdom), an ambitious promotion system was implemented:

- > Web site and CD-ROM were considered two excellent ways to market walking holidays after a survey showed that the target group, recreational walkers, had access to Internet and had equipment to read CD-ROMs;*
- > 12,000 copies of the CD-ROM were produced. The CD-ROM offers virtual walks, 360° panoramic video pictures and an e-commerce connection for those interested in buying books, maps and souvenirs. A campaign was organised in conjunction with the leading walking magazine in the UK, "Country Walking", to distribute the CD-ROM. A paper version of the CD-ROM cover was attached to the cover of the magazine, asking the readers to ring to get their free CD-ROM. Over 7,000 CD-ROMs were distributed in this manner, and names and addresses of recipients were encoded. Country Walking considered the rate of reply of 22% of total magazines in circulation a great success, given that the success rate for this type of operation is usually 2 to 3%;*
- > The Web site has been operating since January 1999 (www.enjoy-cornwall.co.uk). Because of a limited budget, it proved necessary to be included in the mechanisms of the main search engine and to connect to other Web sites dealing with walking in order to gain as much exposure as possible. For this, the LAG hired a consultant to look at how the search engines worked and what was involved;*
- > "Trail Packs" are another promotional tool. They cost EUR 6 per unit and can be mail-ordered or purchased in local retail shops. They are also on sale in the region's tourist information centres (see factsheet-example 7).*

5.2.3 Special events and activities

Walking events are being organised increasingly.

The most popular are walking festivals, which attract thousands of people and raise tremendous interest.

THE INTERNATIONAL WALKING FESTIVAL

A small market town in the heart of the Cevenne Mountains (Languedoc-Roussillon, France), Saint-Jean-du-Gard created the Festival International de la Randonnée / International Walking Festival (FIRA) in 1990. In the beginning, the programme consisted of guided walks on the many paths in the Cevennes. Walkers from the clubs operating in the region came in large numbers, happy to meet with others in the mountain lodges. Gradually, the public grew and the organisers came up with other kinds of walks like walks based on gastronomy, evening walks or underground walks. Today, the FIRA organises two events a year for a steadily growing public of several thousand participants. Some one hundred walks are planned each time.

Chapter 6

Marketing walking holidays

Commercialisation is unquestionably the hardest part when it comes to walking holidays. There is an overabundance of products, and the supply is fragmented. Profit margins are narrow and the public is very segmented. In other words, the best products can fail because of the complexity of marketing them.

Moreover, it is important to know the main principles governing the marketing channels, which are quite complex.

6.1 The marketing partners

These fall into several categories:

- > **Producer***: puts together and sells the finished product, ready for consumption (*unlike the “service provider”, see glossary*).
- > **Tour operator**: the wholesaler who buys the product directly from the producer, or goes through a local middleman, the “receptive” agency*. There are generalist tour operators and specialised tour operators. Each country has tour operators specialising in walking holidays. Some only offer walking, others have a larger brief covering the outdoor pursuits market (cycling, mountain biking, pony-trekking) or eco-tourism. While most specialised tour operators are independent, some depend on groups. For example, in France, the leading distributor of sports articles in the country is also a tour operator (and retailer thanks to its shops).
- > **Retailer**. There are several types of retailers operating on the market:
 - Independent travel agencies, sometimes members of independent networks;
 - Tour operator’s outlets. Most tour operators have their own distribution network, either by post, telephone, e-mail and Internet or through shops set up in city centres where consumers live;
 - Institutional structures or those set up by local institutions may also market products from their area (e.g. regional tourist associations). They

often come on the scene once the public authorities and local actors have completed the time-consuming job of putting the walking products together.

“Enjoy” walking holidays in Cornwall

The walking holidays of the West Cornwall LEADER area (England, United Kingdom) are marketed under the “Enjoy” trademark, created for the “Signpost” project. Signpost was a LEADER project aimed at promoting more unusual local tourist attractions. This was done by creating a network of computer kiosks and backing this up with a call centre and local activities (see factsheet-example 7).

6.2 Marketing channels

Direct selling* by the producer

(the producer directly sells his own product to the customer)

This form of commercialisation is sometimes essential for a producer, since it enables him to market products that, for different reasons, do not meet the specifications of the distributors.

Another advantage is that the producer obtains a better price.

However, this last point needs to be seen in perspective. Direct marketing implies a considerable outlay on:

- > Publication and promotional distribution (catalogues, brochures);
- > Canvassing (mailings, participation in shows, etc.).

The time devoted to these tasks and in contacting potential customers has also to be taken into account.

Selling by tour operators

Generalist tour operators are beginning to take serious interest in walking holidays. Two of the leading operators on the French market offer walking products in their catalogue.

The major tour operators may buy directly from producers, although this is seldom the case, or go through other specialised tour operators who act as subcontractors. They sell through their own network and/or through the networks of independent agencies.

The specialised tour operators partly sell directly themselves (integrated marketing) and partly act as subcontractors for other tour operators.

Because of the coexistence of distribution channels, the same product can theoretically be sold by:

- > The producer (direct selling);
- > Specialised tour operator; or
- > Generalist tour operator.

According to a commonly held principle, the selling prices to the public remain comparable whatever the method of marketing. Only the distribution of the profit margin between the different intermediaries will change.

6.3 Marketing tools

For producers

For direct selling, a good customer list and Internet remain the best promotional tools. For image design and promotion, it has also often proved advantageous to create a producers network offering integrated, coherent products, while the marketing continues to be carried out by the individual *producer* (see *factsheet-example 11*).

It is important to be aware when selling to an intermediary that they are in abundant supply. It is therefore up to the sites and producers to “go hunting”, establishing contacts with the tour operators.

A good way to begin is first to set up a network or create an association so that they can present a whole range of products to the tour operators and devise the best strategy to promote their products.

Tourist workshops* are an excellent way to present the products and attract the interest of a business partner. At these events, a single product is not enough. It is better to have a diversified range, which is why the network is important.

Educational tours, or what the French call “*Eductours*”*, are organised to introduce tour operators to a region and its products. They are generally the responsibility of promotional bodies in an area or local development structures such as the Regional Natural Parks.

An agreement can also be signed with a *receptive agency** in the region to include the product in its catalogue. This will be followed by a negotiating phase to adapt the product to the needs and constraints of the operator.

This preliminary negotiating phase with a tour operator sometimes occurs at a very early stage and may even take place when the product is still being designed and packaged (see *factsheet-example 2*).

For tour operators

Each tour operator develops his own promotional and marketing strategy and does not like to talk about it openly.

Marketing strategies have two underlying elements:

- > Consumer appeal using images that convey the social purpose of walking: “selling a world of imagination, of dreams “... This means attractive catalogues packed with photos that transport the reader to a world of beautiful scenery and friendly encounters with new people;
- > Highlighting services specially designed for walkers, such as the transfer of baggage conducive to unencumbered walking, a hearty breakfast for the fit walker and appetizing picnic baskets with local products.

6.4 Price setting

Setting the selling price of a tourist product is not always an easy task. There is no automatic price. Instead it is the result of a variety of factors, beginning with the product’s cost price. But there is also the question of demand and the extent of the competition.

6.4.1 Cost price

The first step is to **calculate the product’s cost price** taking into account various elements.

Beginning with the easiest item, we first isolate the expenses related to development or the product itself. Some expenses depend on number of customers: prepared meals or food, accommodation, etc. Others are fixed regardless of the actual number of participants: the fee paid to the guide, vehicle rental, etc. It will be

even easier to calculate the cost price if these expenses are billed by third parties.

Production, promotional and marketing expenses are always present and are incurred prior to the sale of the service (or product). If a tour operator or agency puts the product on the market, they will bear the cost. If the service providers or producers do the marketing themselves, they cannot avoid carrying the cost themselves.

For a correct estimation of promotional and marketing expenses time spent on marketing as well as external expenses (cost of doing a mailing or placing an ad in the local newspaper.) must also be included.

Finally, infrastructure expenses are also part of the product's cost price: e.g. the time will come when a new computer will have to be purchased to prepare estimates or product information sheets, or the dining area will have to be renovated for the guests.

6.4.2 Selling price

Once the cost price has been determined, there is the selling price.

The price of the package should, at least, break even with the cost price, unless there is a specific strategy. The targeted margin may vary depending on the needs and objectives of the economic player: to create a new market, to increase sales, to increase profits, etc.

When determining the selling price, there are more subjective estimates that have to be made concerning price levels acceptable to the customer base and related to positioning towards the competition.

So, in addition to relying on facts and figures, the producer or service provider will also have to go by personal instinct when defining the price.

Usually, there will not be just one set price but a **list of prices**, based on several variables:

- > High, middle or low season;
- > Type of customer base targeted, with or without children;
- > Reservation conditions (early reservations can be encouraged by offering a discount); etc.

EXAMPLES OF PRICE SETTING AND COST DISTRIBUTION

Price formation and levels of return are often considered "defence secrets" by the economic actors, and for this reason they are seldom shared. Also, the specific examples often come from public or semi-public players.

In Wallonia (Belgium), for the Grande Traversée des Ardennes (GTA), a system of package tours has been developed, providing customers with a wide selection from which to choose: they can walk one or more segments of the Transardennaise trail, or walk its entire length (in 6 or 7 days), or take one of the other walks described in the guide, departing from one of the rest points along the way.*

The package includes a room in a hotel with breakfast and dinner, or staying in a bed and breakfast or camping. Baggage transfers and a shuttle service are also possible and coloured geographical survey maps are provided. The return drive to the departure point is organised at the end of the stay.

The walks vary from 2 to 8 days and cost between EUR 110 and EUR 520.

The price of the package can be broken down between:

- > Travel agency: 10%;
- > Cost of information and promotional material: 10%;
- > Fixed costs (administration, insurance and guarantee fund): 5%;
- > Other services: 75% (**see factsheet-example 8**).

The situation is similar in France. *The sales turnover of "Retrouvance" (www.retrouvance.com), a group that organises walks in the southern French Alps, consists of:*

- > 20% marketing,
- > 57% local services (guides, meals, transport, etc.),
- > 23% for France's National Forestry Board, which manages the mountain huts and lodges.

Depending on the context, the percentage that goes to marketing can be higher and reach 45% of the sales price.

Should public expenditure be calculated into the product's cost price?

In general, the cost price does not include the amounts spent by public authorities on items like transport facilities, path improvements or regional promotion campaigns. But depending on the context, the cost of certain expenses can be included, at least in part, in the cost price of the holiday: if the local authorities restore forest dwellings and turn them into self-catering cottages, they may decide, depending on the context and the local tourist situation, to pass on part of the conversion costs and include them in the price of the cottages. Any income derived in this manner could then go to convert other buildings.

What are the usual discount and commission rates?

- > Retailers receive between 8 and 10% of the sales price.
- > The tour operator takes a 15 to 20% commission. If the tour operator distributes the product himself, he will combine the two margins and earn 20 to 30% of the sales price.

Can walking clubs create and sell products to their members or serve as intermediaries by reselling products?

Clubs and associations do not escape legal provisions regulating sale of holiday products. As soon as a club participates in a transaction, even if it just cashes cheques and pays the amount to service providers or a tour operator, it becomes responsible for the service (or product) and must meet the legal or regulatory obligations relating to travel agents*, such as prior registration. Almost all countries have adopted this principle for the commercialisation of products and services.

Part 2

Case studies

Walking and local development: the paths of Cloghane-Brandon

[LEADER area in Meitheal Forbatha na Gaeltachta, Kerry, Ireland]

The “Suiloidi an Leithriugh” project aims to promote walking as the main tourist activity in the villages of Cloghane and Brandon. Natural, archaeological, historic and cultural sites are developed along the paths, and several walking products are created.

KEY ELEMENTS:

- > Development of a specific holiday product to attract visitors to remote villages, away from the popular destinations in County Kerry.
- > Systematic cataloguing of the region’s natural, archaeological, historic and cultural resources.
- > Community involvement.
- > Creation of a non-profit making local development agency.

The villages of Cloghane and Brandon are located on the Dingle peninsula in County Kerry, south west Ireland. They are part of the Meitheal Forbatha na Gaeltachta LEADER area, which brings together all the Irish areas where Gaelic is widely spoken. This rather mountainous region is dominated by the Brandon mountain chain (second highest peak in Ireland at 952 metres) and the Sliabh Mish mountains. Lakes, rivers and waterfalls abound. The flora is extremely diverse, ranging from maritime to alpine flora.

The villages have no industry and the majority of the workers are farmers or fisherman. Local involvement is now forcing them to diversify their activity. Although County Kerry is one of the main tourist destinations in Ireland, few tourists go to Cloghane or Brandon. A guide on the area was, however, published 20 years ago but did not have any significant impact on the local economy.

The entity formed by Cloghane and Brandon has good tourist potential, particularly for walking:

- > The area has a strong Gaelic identity, some traditional farming and fishing practices have been preserved and it has a rich cultural and historical heritage. There are archaeological sites from the Stone Age and a Celtic pilgrimage road to the top of Mount Brandon (the Celts worshipped the gods of the region, here the god Crom Duhn). The pilgrimage later became

Christian and was associated with Saint Brendan the Navigator, who is said to have discovered America in the sixth century;

- > In addition to the old pilgrimage routes, there are numerous paths running through the mountains and valleys (old passes connecting Cloghane and Brandon to other villages) and a number of other trails in the countryside.

Between 1993 and 1994, “Udaras na Gaeltachta”, the development agency and LEADER group for the Gaelic-speaking areas, drew up a list of the region’s resources in response to the concerns voiced by local actors. This list and consequent development activities showed the importance of local natural, archaeological, historical and cultural resources and their potential for development.

It was therefore decided to take advantage of this heritage and create walking trails. A non-profit making local development agency, “Comhlacht Bhreanainn Teo”, was given the task of organising special promotional activities.

The product: flexible programmes

Nine walking trails were created for the “Suiloidi an Leithriugh” project and graded according to their level of difficulty. The paths are accessible to walkers of all ages. Among the itineraries, the most popular is the Pilgrimage to Mount Brandon.

The products are extremely flexible, and the customer can choose from three programmes:

- > Area-based holidays – the visitors stay in Cloghane or in Brandon and organise their walks each day according to a different theme;
- > Go-as-you-please holiday – here local walks can be combined with other paths in the peninsula. Accommodation and transport are provided;
- > Organised tour – the local walks are combined with other walks, for example, South West Walks in south-west Ireland.

Implementation: from preparing the paths to training the guides

In making the paths, the farmers concerned were asked permission to let walkers go on their land. Fifty local farmers allowed walkers to cross their fields and put up special ladders over the barbed-wire fences. Insurance was taken out to cover any damage that might occur on the farmers’ property.

The Mountaineering Council of Ireland lent technical assistance to design and develop the paths. Signs were put up. Inscribed stone waymarks were made (at a cost of EUR 1,000).

The local community actively participated in the project and sought to expand the walking activities. They remained nonetheless aware of the need to properly manage the resources to avoid negative impacts.

Bilingual guidebooks (English and Gaelic) were also published. In addition to describing the itineraries, the books contain information about the archaeology and history of the area and about events or famous people associated with the sites. LEADER helped finance the cost of the guides and signs.

A specialised course was also organised with the support of the Mountaineering Council of Ireland to train guides.

People were hired to work in the info centre and manage the facilities: in the summer, students welcome the visitors and promote the heritage. Staff were found, through various job-hiring programmes, to maintain the itineraries and operate the info centre opened in Cloghane.

Marketing: “word of mouth” and using the media

In order to cut down on costs, promotion is deliberately limited. The steady increase in the number of visitors is thanks mainly to “word of mouth” within the walking clubs. The national and local media have played a considerable role in informing people about the different aspects of the project, and the Gaelic-language radio (Radio na Gaeltachta) has regularly broadcast programmes on the area.

Initial results: a tourist dynamic combined with environmental responsibility

The number of visitors has doubled in 4 years and people are also starting to come outside the summer season. Walking holidays are becoming more and more popular between Christmas and New Year.

The Dingle Peninsula Tourism Co-Operative was created with financial support from LEADER and Udaras na Gaeltachta. Its job is to come up with a marketing plan for all holiday products from the peninsula, including Cloghane and Brandon.

The project has generated new investment, particularly from those who left as immigrants and have returned, proof of the renewed confidence brought on by the project.

The availability and conditions of accommodation have greatly improved: the number of bed & breakfasts and self-catering cottages has doubled. A three-star hotel and a new inn opened in 1997-98, creating jobs.

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Developing the hinterland: the Dorgali trail [LEADER area in Barbagie, Sardinia, Italy]

Local operators test out a walking holiday product in central eastern Sardinia, in cooperation with a specialised Dutch tour operator. This alternative to beach tourism is a way of taking advantage of a magnificent but little known interior. In addition to the sale of products by the tour operator, this initiative leads to the emergence of a new local dynamic and access to new markets.

KEY ELEMENTS:

- > Creation of a walking product from scratch, something totally new for the region.
- > Inclusion of this new product alongside traditional beach holidays on the coast.
- > Very heavy involvement of the local officials.
- > Successful partnership between a foreign tour operator and local actors.

Situated in central east Sardinia, in the province of Nuoro, the area of Barbagie is centred on the Gennargentu Mountains whose tallest peak is 1 829 m. The tortured terrain, where gullied mountains alternate with rocky slopes, and the nature of the granite rock structure have limited the development of farming and have made communications difficult. Farming is nonetheless the main source of income for the region, generating a very modest average income of about EUR 6 000 per inhabitant. In Dorgali, a small town with sea access, traditional tourism has been developed but it has gradually become less competitive because of lack of services complementing the accommodation.

The area of the Barbagies ("land of the Barbarians" in the eyes of the Romans who never managed to bring it under their control) has **some real assets for eco-and discovery tourism:**

- > Original, breathtaking scenery: vertiginous canyons, vast caves, cliffs along the coast...
- > A wealth of natural heritage (diversified vegetation, from scrub to holm oak forests, a rich fauna containing several uncommon species);
- > Well-preserved landscapes. Sheep and goat herding traditions in Sardinia have left their mark on the landscape with the building of "cuiles", small animal shelters with architectural features borrowed from the old nuraghic villages;

- > Archaeological wealth. Many archaeological sites contain the remnants of the nuraghic peoples who inhabited the island in the beginning of the second millennium B.C. Among these vestiges, the lone towers, the tholos hamlets, the worshipping stones and the sacred wells, built in hard-to-reach places, offer visitors some extremely symbolic images;
- > Strong identity (Sardinia's traditional culture is very present and perceptible in the area).

The presence of the National Park of Gennargentu, whose aim is to become a centre of attraction for economic development, is another real asset as an institutional tool and providing an identifiable name.

However, there was no real product, no walking infrastructure: the only tourism was along the coast.

The idea of creating an experimental tourist product arose from the meeting between the deputy in charge of the environment for the Province of Nuoro (and main promoter of the creation of the Park) and a Dutch tour operator specialised in ecotourism and walking. This meeting took place at the Environmental Tourism Fair, held in Cala Gonone (Dorgali, Sardinia) in September 1995.

The Dutch tour operator (SP Naturreizen) was won over by the region but was aware of some major difficulties:

- > Saturated hotel infrastructure in July and August;
- > Expensive and irregular air links in spring and autumn;
- > Total ignorance of Sardinia amongst Dutch customers;
- > Absence of individual ecotourism products in Sardinia.

The local officials showed a great willingness to build up walking tourism in their region. A geologist-botanist became involved in the project and brought with him an excellent knowledge of the terrain.

This local involvement meant that it was possible to create a product and convince the tour operator to go ahead with the project, despite market studies indicating that generally it was not a good idea.

The product: independent walking, with emphasis on the environment and culture

Designed in cooperation with the tour operator, the product is a complete package:

- > A 10-day holiday for people travelling alone, for couples or small groups of 6 people (maximum);
- > Dominant theme focussed on the environment, archaeology and culture;
- > Walkers go alone, without any guide, using only a map and topographical guide;
- > Each segment varies from 10 to 20 km a day, or an average of 4 to 7 hours of walking on paths graded from easy to moderate;
- > Tours alternate between day loops and short 2-3 day treks;
- > Accommodation varies between three-star hotels and two-star lodges;
- > Baggage is transferred from one accommodation to the next;
- > Safety watch system organised in case of bad weather or possible incidents;
- > Theme-based guided tours are offered on an optional basis;
- > Stays may be extended for a more traditional holiday.

The product's management: the role of the logistician*

- > The paths were marked out and are cleared regularly, with the collaboration of the Province of Nuoro.
- > A topographical guide and a map describing the itinerary were published.
- > The geologist followed first customers from a distance and personally checked that the markings and descriptive documents were relevant and accurate.
- > Breakfast and dinner was included as a principle in the negotiation of the price of the accommodation with the hotels.
- > The product is directly managed by the tour operator, who signs contracts with the local service providers. The geologist is responsible for the logistics and relations with the area, particularly with all the other local tourist operators. His work guarantees the quality of the services and the product.

Marketing

Promotion: the travel agent's brochures

A travel agent specialising in ecotourism, SP Naturreizen publishes seven themed brochures geared to ecotourism enthusiasts. These brochures are its main promotional tool and are presented at specialist fairs. It has distributed 7,000 copies of the European brochure presenting individual tours including the Dorgali trail. The tour operator has also built a Web site and occasionally mounts press campaigns.

Distribution and commercialisation

SP Naturreizen takes care of the product's distribution and commercialisation. The product is directly marketed through two points of sale and a computerized marketing service.

Initial results

Direct sales

As had been predicted, direct sales in the first year (1996) were modest, with only 29 packages sold. The high cost of transport and the product's unavailability in July and August were two aspects working against the product. On the other hand, an encouraging sign was the high level of customer satisfaction.

Following this, two other holiday packages were developed in 1998 for commercialisation in Germany. The first walking itinerary appeared in the "Adventure" brochure and the second itinerary was included in the tour operator's "Holiday" brochure. In 1999, 78 customers bought the product.

By promoting the product outside the country, a new positive image of the area has been projected, going beyond the "Sun & Sea" image usually associated with Sardinia. This appeal, in Dorgali in 1997, led to the arrival of groups of Dutch tourists travelling on their own, a totally new phenomenon.

The impact of this new tourist sector was estimated at EUR 72 000 in 1999.

A new local dynamic

The partnership between the local community and the Dutch tour operator has led to the development of new products.

By creating all these products, the area now has something new and valuable to offer, fully satisfying its local development objectives, ie:

- > extension of the tourist season beyond the summer period;
- > creation of new outlets;
- > promotion of a form of tourism that respects and takes advantage of the region's culture and heritage;
- > development of products involving different types of operators, private and public, and linking the coast and the interior.

Beyond the products offered by the tour operator, a genuine local dynamic has emerged, helping to launch new projects:

- > improvement and diversification of the itinerary by the Barbagie LEADER group;
- > development of new ecotourism products;
- > promotional campaign aimed at the regional market.

The effects of the emergence of a regional market are already being felt (233 Sardinian tourists recorded in 1999).

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“Wild Nature”, a walking holiday tour operator in Crete

[LEADER area in Temenos-Pediados, Crete, Greece]

In the interior of Crete where there has been an attempt to draw tourists away from the coast, a guide takes advantage of his professional experience with a foreign tour operator to set up a company specialising in walking holidays and outdoor activities. The products are also designed to enable walkers to discover the island’s heritage. These products are now finding their audience.

KEY ELEMENTS:

- > Use of experience in other countries to create new local products.
- > Pragmatic organisation to make up for the inadequate facilities and services available.
- > A day product, suited to the existing tourist context.

Wedged between the coastal area and town of Heraklion in the north and the irrigated area of Messara in the south, the LEADER area of Temenos-Pediados (pop. 65 000) stretches from the Psiloritis Mountains in the west to the Lassithi Mountains in the east. Rising to 811 meters, the area has a diversified landscape alternating between small valleys and hills. Gullies and streams form varied ecosystems, and the economy is mostly centred on vineyards and olive growing, both traditional activities.

There is a great contrast between the coastal region in the north, heavily dominated by mass tourism, and the interior where tourism, little developed, is essentially limited to day trips. Little by little, however, an organised tourist structure is being put into place.

The area has a rich and diversified heritage, be it geological, cultural or historical: at the foot of the Psiloritis and Deiktis Mountains, there are caves, gorges, monasteries and several archaeological sites. The Ecological and Archaeological Park of Giouchta gives expression to this precious heritage.

Nevertheless, there were no trails or footpaths before the creation of the “Wild Nature” company in 1987.

Its founder had worked as a guide for French agencies specialising in outdoor activities. In 1987, he went a step further and set up the “Nature” company which became “Wild Nature” in 1989, an agency specialised

in discovery and ecotourism in Crete. The company is 8km from Heraklion, the capital of Crete.

The products: two separate categories

Designed for small groups or people travelling alone, the products are of two kinds:

- > walking activities (walks and hikes along the coast or in the mountains, bicycle trips);
- > adventure activities (climbing, 4WD tours, trips on inflatable boats).

The activities run from April to October.

The walking products take advantage of the natural (wildlife, ecosystems, geology) and cultural (monasteries, monuments, watermills) resources of each microregion.

For example, the walk through the Astraki gorges includes, in addition to the stretch through the gorges themselves where the vegetation is very dense, a number of stops along the way: visit to the Agarathos monastery and to the museum of the Cretan writer Nikos Kazantzakis. All along the way, the walkers can learn about the area’s small building heritage: the abandoned church of Saint George, stone bridges, the ruins of watermills in the gorge, the cemetery of Kato Astrakon...

These are all day products, but that does not mean the details are forgotten: a picnic with local products is offered. The trip includes participants' transport from their hotel to the trail and back and one or two guides depending on the number of people who sign up. The outing costs EUR 55 for adults and EUR 29 for children.

The product's management: still in its infancy

In a country where walking is still a relatively recent activity, the product has to be organised and managed with a certain degree of pragmatism:

- > there is no specific definition of how agencies specialised in ecotourism are supposed to operate nor what their responsibilities and rights are. Wild Nature has the general licence that tourist agencies are issued by the Greek Board of Tourism;
- > because there are no minibuses, the walkers have to be taken to the mountain areas by coach;
- > during the peak months of July and August, Wild Nature works with the region's walking associations to meet demand and to have enough guides for the activities;
- > Wild Nature itself takes care of the path clearing work in spring.

Marketing

The product's promotion is to a great extent done by the tour operators.

Detailed info sheets for each programme are updated once a year.

Initial results

New diversified customer base

The first three years were difficult because of the little interest, and in some cases mistrust, shown locally in the outdoor activities. The first customers were specifically recruited among foreign tourists (French, German and Swiss). Now, the products have found a diversified customer base: foreign and Greek tour operators, organised groups and individuals.

There are currently 250 excursions on offer for groups averaging 25 people. In 1999, 6 000 people took part.

Improvements are needed

Nothing has been done on the path in the way of improvements. The organisers would like to put up some small signs presenting the rare aquatic plants and some environmental-awareness signs of the kind "please do not disturb the birds". More globally speaking, the nature areas through which the trails pass need to be protected.

As for customer satisfaction, each participant is given an evaluation sheet to fill out. The people who organise the trips pay a lot of attention to the customers' suggestions and are constantly trying to improve the services.

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Ecotourism in the Molina de Aragón region [LEADER area in Molina de Aragón-Alto Tajo, Castile-La Mancha, Spain]

The traditional paths of this fragile rural area have been rehabilitated and marked to create ecotourism products, primarily for people staying in rural accommodation. The local tourist professionals are encouraged to join forces and organise themselves. Topographical guides and a comprehensive tourist guide are published.

KEY ELEMENTS:

- > Restoration of old trails.
- > Development of paths to promote country holiday accommodation.
- > Walks highlighting cultural tourism itineraries.

Lying on the border between Aragon and Castile-La Mancha, the LEADER area of Molina de Aragón-Alto Tajo is rich in history. The largest town, Molina de Aragón, has a medieval castle and a well-preserved historic centre. “El Señorío de Molina”, another name given to the area surrounding Molina de Aragón, was originally not a tourist region. As for Alto Tajo, it was known to small groups of mountain people who used the mountain huts, but it did not have any suitable tourist accommodation or services.

In terms of scenery and nature, the Mesa and Tagus valleys are well endowed, especially since these natural resources have long remained virtually unknown and are unpreserved, in spite of their great environmental value.

Among the locals, walking is not a recreational activity. On the other hand, there is a growing demand for ecotourism from the inhabitants of the large cities relatively close by: Madrid, Valencia and Alicante. A portion of Madrid’s population and the people living on the coast are attracted by the nature of the hinterland. This local customer base makes short trips, for weekends or in the summer holidays, and essentially remains individual, consisting of small groups of young people or families with children.

In the early 1990s, accommodation for country holidays appeared for the first time in the interior regions. Rural tourism was a recent phenomenon in Spain: “self-cater-

ing cottages”, “bed & breakfasts” and “lodges” specially catering to walkers did not exist until then.

An initiative of the inhabitants themselves, the project benefited from the funding of the LEADER I and II programmes. The concepts and methods existing in the Pyrenees and the region of the Peaks of Europe served as a reference.

The products

Walking itineraries were marked out in two separate sections, along the Upper Tajo (“Alto Tajo”) and along the Mesa River “Valle del Mesa”). For the most part, the itineraries used the old traditional paths, which connected the villages or went up into the mountains, and the roads in the forests built for forest maintenance vehicles. The trails were equipped with signs and way-marks according to international standards.

There were some long, rather wide sections, which were opened up for mountain biking and/or pony-trekking.

A topographical guide describes the itineraries in twelve factsheets, each sheet corresponding to a marked path. The factsheets contain a description of the path, a detailed plan with a cross-section view showing differences in height, the duration and degree of difficulty of the walk. The map also indicates where the closest rural accommodation can be found.

Implementation

The product is being implemented step by step:

Step 1: rehabilitation and marking out of 12 paths and publication of the guide "Ecotourism in Señorío de Molina" (implementation period: LEADER I).

Step 2: creation of the "Alto Tajo Rural Tourism Association" whose members include owners of different forms of rural accommodation created and funded under LEADER I and II. This association hired a mountain specialist to write the three guidebooks for walking and mountain biking. The Señorío de Molina initiative was a first, in that the regions usually planned the accommodation and walking itineraries separately (implementation period: LEADER II).

Step 3: A new revised edition of the guide "Turismo Verde por el Señorío de Molina" is to be published. It will look more like a tourist guidebook and again include the description of the marked paths, with the same content as the factsheets of the first phase. The guide will also have information on the different types of country holiday accommodation and on two themed routes "The Rural Romanesque Road in Señorío de Molina" and "The Castle Road of Señorío de Molina".

New paths and trails will be marked out to increase the range of products on offer. These are routes that were described in the three books of the second phase but that did not yet all have markings.

The product's management

The local authorities and the Community of Real Señorío de Molina are responsible for maintaining the paths and forest roads. The regional government normally fund the cost.

The publishing house Prames SA paid for the publication of the three books on walking and mountain biking. However, the publisher received assistance for the publishing costs from the Diputación de Guadalajara, from the Junta de Castilla La Mancha, from the LEADER II group of Molina de Aragón-Alto Tajo and from the Alto Tajo Rural Tourism Association in the form of grants or the purchase of copies. The three books can be found in the bookshops and other shops of the region. The cost of publishing the three books came to EUR 42 070.

Marketing

The Tourist Office in Molina de Aragón has been taking care of the promotion, distribution and marketing.

Information on the paths has been included in the general promotion of the region as a tourist destination. For 2000, a EUR 54 091 budget was earmarked, with 70% coming from LEADER II and the rest from the local authority of Molina de Aragón and the Community of Real Señorío de Molina. This budget covers participation in national fairs, the publication of free tourist brochures and the publication of the Molina-Alto Tajo tourist guide which includes the paths marked in the first phase, the different types of accommodation and the two thematic routes.

All this information, including information on the walks, can be consulted in Internet (www.molina-altotajo.com/). The local tourist office remains open in the high season.

Initial results: the emergence of real local tourism

To date, 30 businesses are members of the Alto Tajo Rural Tourism Association. Most are self-catering cottages in country or small mountain hotels. They are constantly full at weekends and during holidays, from spring to autumn. All the actions carried out have led to the emergence of a rural tourism and ecotourism product with sufficient accommodation and services but a small impact.

The Tourist Office of Molina de Aragón counts the number of people who come through its doors and records where they come from and the reason for their visit. In 1999, the Office registered 9 000 consultations, 80% of which were by tourists living in Madrid, Valencia, Alicante and Saragossa. In 30% of the cases, the consultation concerned walking and the natural environment found in Alto Tajo.

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A very comprehensive product: walking trips in Auerberg [LEADER area in Auerbergland, Bavaria, Germany]

After much local debate and discussion initiated by the LAG, the LEADER area of Auerbergland has created a very dense network of walking and cycling routes covering 800 km.

A complete information system and services has also been organised to offer a well-rounded product. The targeted customer base consists of families and groups, active and non-active.

KEY ELEMENTS:

- > Over one hundred tours combining walking, discovering cultural and natural heritage and local products.
- > Strong participation from the local community (60 working groups).
- > Involvement of several professional sectors and associations in the creation of the product (restaurant and hotel owners, providers of various services, farmers, cultural and environmental associations).
- > Product combines walking, cycling and mountain biking.
- > Innovative service offered to encourage the sale of local products (delivered to walkers).

Bavaria is Germany's leading tourist destination. It is a place for holidays but also where people from the large cities go when they have a day off. Families enjoy walking trips there, but people also like its spas. However, it has not yet taken full advantage of its tourism potential. The region has a whole range of resources including walking, water sports, winter sports and craft villages where wooden toys are made.

Lying southwest of Munich, the area is focussed around Mount Auerberg (1055 m). The LEADER group's area of intervention consists of 9 villages with a combined population of 12 000. 700 family farms produce dairy products and beef. The landscape is Pre-Alps, with hills and low mountains, marshy lowlands and lakes. The local economy is based on several small industries and non-industrial firms and the agricultural sector.

Auerbergland is discovering its potential for niche tourism* thanks to its peaceful setting and building heritage. It is not far from the famous "Neuschwanstein" castle and other less well-known castles, set against a backdrop of magnificent lake scenery. For these castles, American and Japanese mass tourism was developed a long time ago, but the sites are 15 km to the north and Auerberg has derived no benefit from them.

The possibility of taking walks on marked footpaths already existed but there was nothing very organised. The locals are familiar with this form of recreation, in which they like to partake. A potential customer base exists in Bavaria (Munich is not far) and in neighbouring countries, Northern Italy and Austria.

Since 1995, the LEADER group of Arbeitskreis Auerbergland has mobilised 500 volunteers to debate and discuss the area's development. No less than 60 working groups have examined themes as wide ranging as tourism, environment, history, gastronomy, social affairs and the problems of transport and mobility.

The "Tourism" group consisted of professionals from the hotel and catering sector (hotel, bed & breakfast, restaurant owners), people with good knowledge of the area, representatives of the LAG and a landscaping firm.

Various routes taking advantage of the scenery, culture and history of the region were designed and planned with the help of a landscape architect. The baton was passed to the area's 9 local authorities, which implemented the project and took charge of the signs and waymarks.

**The product:
a wide range of themed tours,
on foot or by bike,
backed by quality services**

A vast network of 100 walking and cycling itineraries were developed over a total length of 800 km. Some of these paths are based around a theme: Dairy Route, Mill Trail, Nature Discovery and Marsh Way and the Old Roman Road (Via Claudia Augusta). Over 2000 years old, the Via Claudia Augusta, beginning in the Po valley (Ostiglia, Italy) and ending at the Danube near Auerberg, is the subject of a transnational cooperation project between rural areas in Italy and Germany.

On some of the routes, the walkers pass by farms where they can buy local products. They can also stop at local restaurants and hotels along the way.

Finally, some of the trails have been turned into bicycle paths to satisfy a growing demand from groups and families who enjoy cycling and mountain biking.

The possibilities on offer are many: day trips or tours lasting several days; combination of sport, recreation, direct buying on the farm, cultural or nature tours. Some of the tours are with guides.

Dedicated walkers and cyclists also have the choice between two long-distance circuits (80 km).

In addition to the work on the paths, a series of info sheets and well-documented maps (the Auerberg "randomaps") were produced. These show the itineraries and interesting sights (panoramic views, historic and religious heritage) and services (inns, farm products). All this material is available free of charge to the walkers.

A uniform system of signs and waymarkings was designed: the same logo for the entire network and different signs for each local authority area.

A whole network of info points and centres was set up in the area in places like tourist offices, hotels, farms, inns and bicycle rental shops.

An original service idea has been developed in the area for walkers who can order fresh farm products and have them delivered directly to the fridge of the establishment where they are staying.

The product's management

The area's 9 local authorities (all members of the LAG) are responsible for the maintenance work on the paths and receive help from volunteers and tourist associations.

The walking holiday product (the accommodation, eating places, the paths and their signs) boasts a quality label granted by the German Tourist Association.

Marketing

First available in printed form, the maps have been updated and are produced in a CD-ROM format in German. This enables holidaymakers to have an exhaustive supply of interactive information to prepare their trip.

The CD-ROM is also a valuable tool for local tourist offices.

An Internet site (<http://www.auerbergland.de>) provides complete information in German and Italian but cannot be used yet to make reservations.

The "info sheets" describing the itineraries – available in bed & breakfasts, post offices, shops and farms – give full information about the route and on the cultural sights and eating places along the way.

Initial results

People are staying longer, and the number of nights and meals purchased has consequently increased. In 1999, 460 guided tours were sold.

The existing infrastructures have also improved. New restaurants have opened, more quality products are being sold, direct selling on farms is on the increase and the area's cultural heritage is being given a new lease of life.

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The “Landsker Borderlands”, a new tourist destination

[LEADER area of South Pembrokeshire, Wales, United Kingdom]

Following an evaluation exercise and discussion involving people from 35 villages in this fragile rural area of Wales, a tourist strategy has been elaborated, which includes the creation of walking and cycling holiday products. The area has developed 240 km of operational paths. A tremendous effort has been made to provide training, giving the inhabitants the role of “ambassadors” for their region. This strategy is part of a move to encourage sustainable development, expressed in a concrete example in the “Green Farm-Based Tourism” project. This is a way for family farms to take advantage of tourism to supplement their income. The “Landsker Borderlands” path is the first “green” path in Wales.

KEY ELEMENTS:

- > Creation of a quality walking holiday product for people who want to discover a little known region.
- > Elaboration of an environmentally-friendly programme that benefits the locals.
- > Definition of strict quality standards for the products and services offered (hospitality, information, development of historic sites, etc.) and support given to producers to achieve this.

A relatively sparsely populated rural area (52 inhabitants per km²), South Pembrokeshire has, between the coast and the countryside of the interior, pleasant and varied scenery and a lot of hidden cultural wealth. The LEADER intervention area corresponds to the “Landsker Borderlands”, the dividing line between the English-speaking communities in the south and the Welsh-speaking inhabitants in the north. Despite the beauty of the region, the tourist business was, not that long ago, mostly seasonal and concentrated along the coast.

South Pembrokeshire has several positive features:

- > a good deal of natural and cultural heritage;
- > “Pembrokeshire Coast National Park”, which is a protected area covering one third of the territory.
- > easy accessibility from London by road and rail;
- > the existence of a network of paths long out of use.

Despite this, until 1990 everything still remained to be done: tourists still had little to choose from in the way of activities, the accommodation was of poor quality and the public transport was run down.

Originally, the “Landsker Borderlands” action was meant to help local people find new uses for their cultural and

natural heritage. Culture and environment then turned out to be two development levers that could be combined with tourism, provided that there was a specific product to offer. This product had to be geared towards the discovery of local historical and natural heritage and benefit the local inhabitants first.

Implementation

After the creation in 1990 of the SPARC (South Pembrokeshire Partnership for Action with Rural Communities) development association, which was to become the LEADER group the following year, an area evaluation based on village appraisals was carried out with help from an expert in tourism. Over 1 000 people participated in these surveys conducted in the 35 villages of the area of intervention. Each village then drew up a tourist action plan.

The move led to the development of 240 km of trails. The paths vary in length, and some are based on a theme. Some of the walks, often very short (1.5 km to 2 km), pass through the villages while others follow the old rail lines through the surrounding countryside (6 to 8 km).

Along the itineraries, walkers can discover the area's small rural heritage buildings as well as historic and religious monuments (chapels, castles) or simply enjoy the birds and fauna in the hedgerows as they go down old sunken lanes.

Various types of accommodation were created near the paths, including lodges, expanded "bed & breakfasts", campsites and small hotels.

A series of village and walking brochures were published. An illustrated guide has been a useful aid for exploring the itineraries.

Each year, a "Walking Festival" is organised.

Several package products (from 2 to 7 days) are offered. The flagship product is the "Landsker Borderlands" trail, which lasts 7 days and includes all services such as baggage transfer and transport.

It took five years (1990-1994) before the "Landsker Borderlands" project was completed and recognised.

Training played an essential role in the programme's development. A number of modules were organised in a wide range of fields: history and interpretation of local heritage, construction and restoration of buildings, training of unemployed people in such areas as physical development of footpaths, repair of bridges and walls, restoration of small heritage buildings and the erection of signs.

Training in management of a tourist business was particularly encouraged and was compulsory for applicants seeking a grant to improve their facilities. Because of the proximity of two computer centres, it was possible to organise courses on how to use new technologies (computer management in particular).

All the actions were part of a move to achieve sustainable development, and for that reason local resources were favoured. Priority is given to local wood when restoring or building footbridges or gates, for example. The thematic tourist guides are designed and made by local artists and designers.

So that the local community would benefit from the tourist business and to promote conservation of the environment, a farm hospitality network was created where the members pledge to abide by a series of commitments such as using local products in meals served to walkers and doing an environmental audit. Here too the service providers were offered training.

Management

Quality control is done by the "Welcome Host Association", which was created by SPARC and boasts 150 members. They all participated in training sessions on customer service organised by the Welsh Tourist Board. Regular surveys are also done to test customer satisfaction.

An analysis of visitors' transport needs led to the "Greenways" project. Run by the Welsh Rural Development Agency and managed by SPARC, the project aims to encourage visitors to use public transport.

It has an annual operating budget of EUR 156 250 (in addition to EUR 62 500 for promotion). Funding comes from grants and commissions taken on services sold.

Information and promotion of the area

Several converted buildings have been set up as service centres, like the old town hall of Narberth, turned into a tourist information centre. The visitors find information wherever they go, thanks to the network of 24 tourist info points set up in places like pubs, shops and post offices.

To promote the walking holidays, several approaches have been adopted. Promotional articles or advertising spots are regularly published in specialised magazines.

Marketing

Deals were struck with British, German and Dutch tour operators.

The "Landsker Holidays" agency, created by SPARC, has also set up a reservation system for the sale of local tourist products.

Initial results

Given that the product is still recent and that it takes a long time to achieve a balanced economic situation, it is still too early to assess the project's real impact. However, positive results are already being seen in the area:

- > by offering tourist products in the low season, several hotels and restaurants have now been started or upgraded;
- > villages and sites have been restored, maintained and embellished;
- > over 6 000 holidays (averaging 3 days) are reserved each year, part of which is for walking products;
- > the area's image has been transformed.

In February 1994, SPARC received for this project the "UK Tourism Trophy" (one of the five prestigious awards given each year by British Airways in collaboration with the British Tourist Office and tour operators). The same year, a very popular television programme gave 14 million British TV viewers the opportunity to discover the Landsker Borderlands.

In April 2000, Green Globe Agenda 21, which works to promote sustainable development, honoured the Landsker Holidays agency with a distinction.

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“Enjoy”, a product for occasional walkers [LEADER area in West Cornwall, England, United Kingdom]

The LEADER group of West Cornwall is looking for a way to make better use of its walking itineraries, already very popular in Cornwall. A product is created for “non-dedicated” walkers, a target group identified by a market study. 48 itineraries for day walks are selected, in close consultation with over 200 local providers of tourist services.

KEY ELEMENTS:

- > Use of market segmentation techniques to identify a niche market and a target group.
- > Creation of a product and marketing plan according to the profile of the target group.
- > Creation of day itineraries combining a half-day walk and other tourist and recreational activities.

Situated at the southwest tip of England, West Cornwall has a very long coastline where heath, farmland and sheltered coves predominate. Industry and tourism are the two pillars of the economy of this LEADER area, with each of the sectors providing jobs to about 30% of the working population.

Tourism has traditionally revolved around family holidays on the coast, but this market began to decline in 1989 due to the general downward trend in this type of holiday and the growing competition from organised holidays abroad.

Walking is anything but new to West Cornwall. There is an abundance of footpaths, and the best-known and most popular itinerary is the South West Coastal Path, which runs along the peninsula from north to south. The potential for walking holidays in the region is especially great, given that a large part of the area has been declared an “area of exceptional natural interest”.

A large number of tourists therefore walk along the paths, but they mostly stick to one or two well-known itineraries. The economic impact of this is especially low, considering that the paths are far from the local tourist establishments (restaurants, inns, craft and souvenir shops), which could profit from the presence of the walker. What is more, the maintenance on these paths is very expensive.

Implementation: a preliminary market study

The “Rural Tourism Walking Project” began with an appraisal, which identified walking as a poorly organised and under-utilised market segment that could, if developed, create considerable local added value. This market had the advantage of being an activity done, in part, during the low season, the walkers often preferring to avoid the summer crowds.

The LEADER group of West Cornwall then did a market study to look at the potential customer base, identify a target group, develop a profile and consequently design the product.

The study showed that dedicated walkers brought little benefit to the local economy, because they usually come well equipped and stocked with provisions. On the other hand, 80% of the tourists walk during their holiday, without necessarily considering themselves “walkers”.

The LEADER group therefore targeted the customer base of “non-dedicated walkers” on account of their positive economic impact. This target group usually travels by car and likes to stay in one or, at the very most, two places during their holiday. This means there is little demand for long walking itineraries where each day the walker pushes ahead along a new section.

Once all this was determined, the LAG examined the 300 or so existing walking itineraries in the area. Some of them were selected and evaluated on site.

The local businesses (eating places, accommodation, tourist attractions) situated alongside or near the paths proposed were then asked to participate in the initiative. In the end, 211 businesses answered the call. Their minimum annual membership fee of EUR 83 mostly goes to pay for promotion.

The product: itineraries designed to satisfy the tourists and local commerce

A whole series of day trails and footpaths, in total 48 itineraries, were created near accommodation points. The tourist sites, shops and eating places selected also have paths leading to them.

The tours were designed to take account of the walkers' needs:

- > the itineraries vary in length but generally do not exceed 18 km, given that the non-dedicated walkers' physical stamina varies and they do not want to walk more than half a day,
- > activities proposed correspond to a full day, consisting of a walk in the morning, a stop for lunch at a place near the path, and an afternoon activity at a nearby tourist site. This concept guarantees the best economic results for the local businesses;
- > trails are spread out over the 8 tourist sub-areas of West Cornwall. Each sub-area offers visitors between 5 and 7 walks, listed according to 7 different themes: cultural and industrial heritage, gardens, the arts, animals and nature, etc. The diversity and cultural content of the walks encourages the visitor to stay several days, to the benefit of those providing accommodation and other local tourist services.

For each sub-area, there is a trailpack describing the itineraries. The pack contains a set of double-sided, A5 walk cards. Each card presents a walk plan with instructions as well as a proposed lunch stop and a list of nearby attractions suitable as an afternoon activity.

Marketing: developing an adaptable tool

The purpose of a second project, the "Tourist Information Walking Project" was to define and develop marketing tools for walking holidays. This led to the creation of a model that could be adapted to the promotional policy of other niche products like water sports or golf.

A survey showed that non-dedicated walkers often had access to the Internet and a CD-ROM player. The Web site and CD-ROM were therefore chosen as the main marketing channels for the walking products.

- > The Web site (www.enjoy-cornwall.co.uk) has been operational since January 1999.
- > 12 000 copies of a CD-ROM have been produced, presenting virtual walks, video images and panoramic views and also including an e-commerce section where books, maps and souvenirs can be purchased. A campaign was organised in collaboration with the main walking magazine in the UK, "Country Walking". A printed version of the CD-ROM cover was attached to the magazine cover, urging readers to call in to receive their free CD-ROM. Over 7 000 CD-ROMs were distributed in this way, and in return their names and addresses were encoded in a database. The reply rate of 22% of the total number of magazines sold was considered a great success by Country Walking, given that the usual rate for this kind of operation is 2 to 3%.
- > The Trail Packs are another promotional tool. Selling at EUR 4.95 the pack, they can be ordered by mail or purchased in one of the local shops and in the region's tourist information centres.
- > The walks are marketed under the "Enjoy" brand, created for the LEADER IT project, "Signpost"^[7], which aims to promote West Cornwall's less common tourist attractions.

[7] See factsheet T17 in the directory "Innovative Actions of Rural Development", LEADER European Observatory / AEIDL.

Budget

Financed in two phases under LEADER II, the project has a total budget of EUR 505 868 funded by:

- > EU contribution: EUR 252 934;
- > Other public funds: EUR 170 276;
- > Cornwall Training and Enterprise Council: EUR 49 595;
- > Member companies (membership dues): EUR 33 063.

Initial results

Determining the project's economic impact and the number of new walkers is difficult when there is scant data and no admission fees. Some indications can, however, be found in the sale of the Trail Packs, the distribution of the CD-ROM and the number of visitors to the Web site. As of 1 January 2000, the following results had been registered:

- > sale of Trail Packs: 2 365
- > distribution of the CD-ROM: 9 633 (free); 46 (sold);
- > Web site visits: 7 000 (with a peak of 1 200 visits in June 1999).

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Multi-choice Walks: the “Grande Traversée des Ardennes” [Wallonia, Belgium]

Four long-distance trails between 120 and 160 km in length have been created across the Belgian Ardennes. Each route is the basis for a holiday product designed and marketed by a tour operator, “Europ’Aventure”. The customer can choose from a range of possibilities and options: 2-8 day stay, guided or unguided tours, by foot, bicycle or horse.

KEY ELEMENTS:

- > Professional design of an outdoor recreation product.
- > Concern for safety with signs and waymarks that comply with the Walloon Region ministerial decree governing marking of paths in and outside of forests. The yellow and white “GTA” (*Grande Traversée des Ardennes*, or “Great Crossing of the Ardennes”) sign is internationally recognised like the red and white GR (*Grande Randonnée*) sign in France.
- > Creation of a local concept of outdoor recreation in Wallonia that includes assistance for the participants and a chain of services along an itinerary.
- > Permanent updating and improvement of services offered.
- > Partnerships between public authorities and private service providers.

Covering a good portion of French-speaking Belgium, the Ardennes are without a doubt the place where tourism is most developed in the Benelux, next to one of the most densely populated regions in Europe. This area of low mountains mostly attracts mass tourism, traditionally in the form of several weeks at a campsite, a holiday centre or a hotel. Unlike this mass tourism, concentrated in small urban centres, rural tourism attracts a targeted group. Self-catering cottages have been developing over the past few years.

The town of Bastogne lies in the heart of the Belgian Ardennes, at a middle altitude of 589 m in the Saint Hubert forest. It has a continental climate, meaning cold winters. The soil is rather poor, so the land is mostly used for livestock farming and forestry.

The “Pays d’accueil de Bastogne, Saint-Hubert et La Roche-en-Ardenne” (“The Land of Hospitality of Bastogne, Saint-Hubert and La Roche-en-Ardenne”) and the neighbouring area, “Pays d’Houffalize” (“Land of Houffalize”, one of the European meccas for mountain biking), are important economic and tourist development centres with a large concentration of shops.

“Eco” tourism with short stays is proving to be quite a success at the moment. In this context, recreational holidays are on the rise. Hiking (numerous clubs) and walking are a tradition in Belgium, but day walks are the most popular. Several long itineraries cross the country. However, the concept of following a walking itinerary for several days, with services along the way, did not really exist in Belgium until recently.

In the beginning there were no continuous, permanent footpaths or trails running north to south in the Ardennes. The idea of creating such a walking itinerary came from an association organising hikes between two tourist towns, on temporary trails. Called the “Transardennaise”, the first yellow and white “GTA” itinerary was created in 1985 as a joint effort between tourist offices, local authorities and agents from the Nature and Forest Department (DNF) responsible for management of public forests. The promoters of the “Transardennaise” decided to make the itinerary permanent and to extend it southwards all the way to Bouillon, one of the main tourist centres in the Ardennes.

The project was implemented by an outdoor enthusiast working for an association called the “Grande Traversée des Ardennes (GTA)” (later renamed “la Maison de la Randonnée- GTA-Belgique” when other cross-border itineraries were added). He himself had been inspired by a meeting in 1983 with the initiator of the “Grande Traversée des Alpes” in France. A federation has recently been created between the designers of itineraries called “Itinéraires de Wallonie” (Itineraries of Wallonia).

The products:

The “outdoor recreation” product is based on the principle of designing itineraries for different types of outdoor recreation (walking, mountain biking, cycling, pony-trekking) and publishing road books, maps and tourist products combining the various services. Each itinerary includes local walks departing from the villages along the way.

The four itineraries each have something unique to offer:

1) The Ardenne-Eifel^[8] “Rhin-Meuse” trail has a 160 km or 200 km cross-border itinerary divided into 9 sections, from the town of Gerolstein in Germany, through the Bastogne Leader area to Saint-Hubert in Belgium. Several 2-day/2-night stays are also possible.

2) The Ourthe and Laval valleys itinerary is a 120-km radial tour through the Belgian Ardennes. There are 6 different marked walks that radiate out from a single tourist centre (6 days and 6 nights). The site focuses on the theme of mushrooms and their cultivation.

3) The “Transgaumaise” is a 140-km loop walk around Virton, the Gaume capital in the southeast tip of Wallonia, (6 days and 6 nights). The trail crosses the border to Montmédy, in the French Region of Lorraine. The sections are from 20 to 25 km.

4) The “Transardennaise” is a 160-km walking itinerary from La Roche, through Saint-Hubert (“European capital of hunting and nature”) to Bouillon. The walk varies from 2 to 7 days, in sections of 18 to 25 km.

The four itineraries are meticulously described in a route booklet and included on the official geographical survey maps produced by Belgium’s National Geographic Institute. Walkers can obtain these from the Maison de la Randonnée.

The tour can be done with a guide, but most people choose to walk unaccompanied.

The services provided include the transport of baggage, return to the departure point, maps with a map holder and the topographical guide. The accommodation, which includes breakfast and dinner, is organised in hotels, bed & breakfasts, campsites or country gîtes; a packlunch is optional.

The product’s management: dividing up tasks

The “Grande Traversée des Ardennes – Belgique” association was created in 1988 with the purpose of developing the network of marked trails, maintaining them, encouraging the creation of self-catering cottages along the itineraries and offering walkers such services as tours with trained guides, the transport of bags, accommodation and meals. GTA Belgique designs the books and maps for the itineraries and also designs the outdoor recreation products.

GTA is responsible for marking out and maintaining the paths and has contracts of specified duration with people who maintain the signs and waymarks. The association has organised courses in trail marking with the Belgian Training Centre for Small Firms and Traders (equivalent to the Chambers of Commerce) and the European Social Fund.

In future, the cost of marking out the paths, installing the necessary fixtures and maintaining signs and waymarks should, in part, be financed through public funds, at least the itineraries bearing the Belgian Tourist Board label.

The designer is responsible for maintenance. LEADER can help with development of local or regional plans for permanent itineraries.

In order to comply with European rules, GTA-Belgique launches the projects and entrusts their management and marketing with a certified tour operator: “Europ’Aventure”.

Rural tourism federations like the “Fédération des Gîtes de Wallonie” (Federation of Self-Catering Cottages of Wallonia), farm tourism federations and the hotel sector provide the walkers with tourist and hotel services. Some one hundred service providers are involved in the project.

Developing the engineering of the itineraries is essential to ensure walkers’ comfort and to provide interest points along the walks.

[8] The Eifel region in Germany is a continuation of the Belgian Ardennes.

This has led to the launching of a "Tourist Passport" and "Guest Card" which offers various advantages to customers visiting the Ardennes.

The regional water and forest agency (DNF), local authorities and tourist offices of the areas crossed worked together on the project, granting the rights of passage and permits to mark out the paths. The official tourist organisations inform the public about the itineraries.

Marketing

GTA-Belgique and Europ'Aventure came up with a system of packages ranging from 2 to 8 nights, with the possibility of covering one or more sections of different itineraries.

The price of the package ranges from EUR 75 to EUR 120 EUR per night, depending on services offered.

The price of a week package varies from EUR 580 to EUR 1 150.

Promotion

There are several types of publication:

- > a GTA brochure published by "Europ'Aventure";
- > brochures in several languages;
- > books (published by GTA in collaboration with private publishers) sold at the price of about EUR 14;
- > maps (scale of 1/50 000 and 1/25 000) produced by Belgium's National Geographic Institute and costing between EUR 33 and EUR 9 depending on the itinerary.

The information is distributed by the tourist offices, the Belgian Tourist Board (CGT), the tourist federations and the "Maison de Tourism" (Tourist Centre). A Europ'Aventure Internet site is being created.

Distribution and commercialisation

The Grande Traversée des Ardennes is participating in the development of walking holidays with partners like the Grande Traversée des Alpes.

Europ'Aventure is a receptive tour operator specialising in walking and adventure products in the Ardennes. It also represents European tour operators.

Initial results

Targetting the customer base

The first group of customers targeted was one-day hikers and walkers. But this initial customer base had to be widened and products had to be developed for other recreational forms such as cycling and pony-trekking.

Quantitative results

400 to 500 packages are sold each year, in addition to short stays and day trips.

But the sale of the package holidays reflects only part of a much larger public, witness the sale of books of which 20 000 copies a year are sold for some itineraries.

Local impact

In terms of employment, the project represents one full-time job (design and coordination) and one part-time job (marking out paths).

The impact on the local economy has been real for the accommodation and restaurant sector, local merchants, bicycle rental shops, tourist sites, local products and indirect employment.

There has also been a considerable impact on the region: inclusion of the itineraries in permanent local and interregional networks, particularly within the LEADER area of Bastogne; coordinated development of points of interests in the tourist area, with cultural or historic walks and themed trails.

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“La Balaguère”, a tour operator specialising in walking holidays in his own backyard [Pyrenees, France]

A tour operator specialising in guided walking tours and discovery tourism, “La Balaguère” markets over 100 walking holidays, selling three quarters without any intermediary. Operating throughout the Pyrenees (French and Spanish sides), the company has become one of the leading tour operators for walking holidays in France. This success is part of a strategy based on a strong local presence: the business has been run since its creation from a small village in the French department of the Hautes-Pyrénées and the Pyrenees still account for the better part of its sales turnover.

KEY ELEMENTS:

- > Creation of a new tourist sector in the area.
- > Specialisation of the operator in a specific mountain range.
- > Development of service providers’ loyalty.
- > Local presence.
- > Control of marketing operations.
- > Membership of a network of professionals cultivating the same image.

A vast range of high mountains (Aneto Peak: 3 404 m) stretching 430 km from the Mediterranean to the Atlantic, the Pyrenees encompass a group of very contrasting and very unequally developed areas, spread out over three French and four Spanish regions.

In the Pyrenees, tourism is mostly concentrated in ski resorts in the winter and in summer in a few large sites (eg. the Cirque of Gavarnie) and in areas near the Mediterranean and Atlantic coasts. The mountains are for the most part a vast and still underdeveloped natural area, away from large tourist flows.

The largest mountain range in southern Europe, the Pyrenees are rich in nature, with few urban areas and relatively few facilities. The entire range is a perfect place for outdoor sports, especially walking and hiking. There are quite a large number of marked trails and footpaths now in the different regions of the Pyrenees.

La Balaguère was started up in 1984 by two walking enthusiasts who ran a mountain hostel. They decided to create a non-profit making association and organise guided walks in the Pyrenees to gain more customers for their hostel. Very quickly, the organisation of walks proved more profitable than the accommodation business.

The La Balaguère association began working with other French and Spanish non-profit making organisations and with independent guides. In 1992, the project’s initiators decided to create a joint-stock company of which they would be the shareholders.

Implementation: development firmly rooted in the local area

La Balaguère became a tour operator, creator of tourist products and a travel agency all in one. Its decision to become a limited liability company was accompanied by appraisals, training and market studies which benefited from public financial aid.

In the beginning, La Balaguère designed its tours using what already existed: paths, mountain huts and hostels. Then, little by little, it began to convince the local authorities to clear, mark out and maintain paths. Today, much of the authorities’ focus has shifted to the area’s development.

In 1993, La Balaguère opened a sales office in Paris and in 1996 began operating from business start-up sites rented from the Arrens-Marsous local authority in the Hautes-Pyrénées department.

La Balaguère's development is, in part, based on the inclusion of the main players in the business. The twenty or so loyal guides who are at the heart of the project have become shareholders, with a 50% stake in the company.

The product: Pyrenees first

La Balaguère is first and foremost a Pyrenees specialist and as such most of its products are set in this context.

In addition to specialising in the area, the company offers a very wide range of products: walking tours with a tent, holidays for sport enthusiasts, nature or culture holidays, ecotourism, canyoning and water trips, etc.

Independent walking has also become one of the more popular products offered.

Alongside this, La Balaguère sells trips "on the other side of the world": expeditions in Mauritania and Turkey, Morocco and Nepal, at high altitude, etc.

La Balaguère is not only specialised in an area. A distinct feature of its products is the importance given to the quality of human relations in the discovery process and in the way in which accompanied groups' work.

La Balaguère's large catalogue, which is a reflection of the strong segmentation of the market, enables it to reach a very wide group of people: above all individuals, couples, but also families and small groups.

It is worth noting that the customer base for the products "on the other side of the world" is first of all in the Pyrenees. The locals prefer to go to a regional agency to organise their trip.

Marketing: joint promotion with similar structures

With other structures of the same kind, La Balaguère founded the "Vagabondages" ("Rambling") network comprising several walking organisations, all located in rural or mountain areas. These businesses share a common approach and define themselves as "mountain artisans".

The purpose of the network is to help "fill" groups within fixed deadlines and to develop a common promotional policy, for example by creating a "Vagabondages" customer discount card. It also acts as a valuable discussion forum for the network's professional members.

La Balaguère has gone for targeted marketing. It does not advertise to the general public. The company participates in the "Salon de la Randonnée" ("Walking Fair")

in Paris, advertises in specialised magazines like "Pyrénées Magazine" and publishes annual brochures of its products, including independent tours without a guide.

The company directly markets 75% of its products, the rest is sold by 6 partner tour operators and agencies in France and abroad. It works with a network of service providers (hotels, mountain huts, restaurants, hostels, etc.), giving them priority but not exclusive rights.

Initial results: managed growth and strong impact on local economy

The company now has 6 000 customers and in 1999 posted sales totalling EUR 304 892.

The difficulties of managing its very rapid growth have been surmounted. Financially self-sufficient, the company has a net margin, thanks in particular to its relatively large percentage of in-house production. Its low equity level does, however, pose a problem.

The very seasonal nature of its activities (it does three quarters of its business in the summer months) was another potential source of difficulties for the company.

One of the solutions found was to adapt the brochure: walking holidays in winter months in the valleys and along the coast, snowshoeing (which has proved extremely successful), holidays in low season outside France (Morocco, Madeira, Balears, Andalusia) based on the same principle of discovery through walking.

The impact of La Balaguère's activity on the local economy is considerable: 11 employees in a village of 500 inhabitants, 50 seasonal workers scattered across the entire mountain range and 50 service providers (small hotels, mountain hostels and rural inns).

The local added value is particularly high. In certain rural areas, walking holidays have mushroomed. The Val d'Azun tour, which takes five days (overnight stays in hostels), attracts 500 customers a week, representing sales turnover of about EUR 200 000, an exceptional success for an unknown canton in the Pyrenees.

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From a “gîte d’étape” to a “Rando’Plume”: the changing face of ramblers’ accommodation [France]

Created in France 30 years ago, the “gîte d’étape” (a kind of mountain hostel) is an accommodation specifically designed for walkers. The concept is being modified to take account of the change in the traditional customer base and the appearance of new customers. But this necessary “facelift” is proving to be complex, and customer segmentation and the increasingly unstable forms of tourism, including walking, are forcing those in the business to manage their product with ever-greater precision. A new concept is emerging, the “Rando’Plume”.

KEY ELEMENTS:

- > Implementation of a marketing approach to walkers’ accommodation.
- > Involvement of owners and project organisers in definition of a national tourist strategy.
- > Design of whole range of accommodation for walking holidays and, more broadly speaking, discovery tourism.

Born in France in the 1970s under the impetus of the public authorities, the concept of the “gîte d’étape” was a response to the lack of holiday accommodation in mountain villages. This was in contrast with the situation in Switzerland and Austria where a lot of operators and inhabitants of the upper valleys had invested in hospitality services. The *gîtes d’étape* were designed to meet the needs of walkers at the time, offering group accommodation that was convivial but rustic. The fact that they were set up in villages was also to satisfy the objective of local development. Within twenty years, over 800 of these refuges had been opened in the French mountains and in Brittany by individuals and local authorities.

From the 1990s, however, the number of people using these *gîtes d’étape* began to decline. A study confirmed the empirical observations: the *gîtes d’étape* were not adapting to market changes. People wanted accommodation that provided more comfort and privacy and was not so heterogeneous. They also had strongly contrasting economic results. So the Ministry of Tourism launched a wide scale debate on the future of the *gîtes d’étape*, in close collaboration with the five main bodies concerned with the development of recreational walking in France. More than just define new standards for the *gîtes d’étape*, it wanted to review the entire accommodation picture for walkers and hikers.

The products: growing accommodation segmentation

In the past, hiking was virtually considered a sport for the very motivated and athletic and was often organised in clubs. Now it has become a recreational activity for the general public. Demand is turning towards establishments offering more material comfort, more services, possibility to choose from more activities and more ways to discover the region.

Birth of a new concept: the “Rando’Plume”

In 1992, a new label was created. A name coined from the combination of two French words meaning “walking” (*randonnée*) and “feather” (*plume*) as in quilt, “Rando’Plume” is a label that the *gîtes d’étape* may use if they meet certain specifications concerning the:

- > comfort (individual bathrooms, rooms with 2 to 4 beds, etc.);
- > quality of the welcome (welcome drink, information signs, etc.);
- > provision of various services (possibility of having meals, large breakfast, information on the region and nature and discovery activities);
- > transport of baggage, shuttle service;
- > quality of the building and its environment (well-maintained building, traditional or contemporary architecture, located in a pleasant setting, etc.);

> activities (possibility of at least two types of nature and discovery activities).

The owners also pledge to promote the *Rando'Plume* network and to participate in the actions it undertakes, notably the training courses.

However, the *gîtes d'étape* have been slow in adopting the label: there were 120 *Rando'Plumes* in 1999.

The reason for this is the difficulty many of the *gîtes d'étape* have of satisfying all the objectives of the *Rando'Plume* charter. Contacts with the refuges' owners, the profile of the project holders and the market analysis show that the *Rando'Plume* label, far from just bringing the *gîtes d'étape* up to new standards, is a different concept aimed at another customer base.

France's Ministry of Tourism and the major operators of walking holidays are therefore moving towards a two-pronged course of action: finalisation of the *Rando'Plume* concept and continuation of the rehabilitation of the *gîtes d'étape*.

The *Rando'Plume* is appearing as a real rural tourism business, offering services that go beyond simple accommodation. While walking remains a well-established activity, there is strong demand for "intelligent" discovery of an area by foot but also by other means such as by bicycle or on guided thematic outings. These short stays are also an opportunity for families to spend time together. A certain type of establishment is therefore necessary for this. It must be able to operate in a flexible manner and the owners must be genuinely able to provide all the necessary hospitality services and activities.

To offer a rich and structured product, the *Rando'Plumes* must operate in osmosis with the entire local economy fabric, and in so doing become small centres of attraction for tourism.

Necessary rehabilitation of the gîtes d'étape

In parallel to this, the *gîtes d'étape* still have a reason to exist. They serve the purpose of providing a form of accommodation for which there is demand: itinerant walkers, groups of walkers, etc.

Furthermore, they are a necessary addition to the network of accommodation in certain regions poorly equipped or little developed for tourism.

Therefore the efforts during the next few years should focus on renovating the *gîtes d'étape* so that they all provide a minimum level of comfort and facilities.

Including rural hotels

Until now, small rural hotels have had difficulty attracting part of the customer base of hikers and walkers, despite the creation of labels for hotels wanting to position themselves for this type of customer (for example, "Balladhotel" and "Randhotel"). Upon analysis, these labels appear to have an insufficient content, failing to satisfy the expectations of the "new walkers" and unable to create a network dynamic. In 1999, a study pointed to some avenues that might be explored to include hotels among the different forms of accommodation appealing to nature lovers and outdoor pursuits enthusiasts.

In addition to the establishment's material standards, the study recommended that the hotel owners develop a hospitality approach and coordinate it with local recreational activities.

Implementation: involving all the players in the definition and management of labels

To debate and test these various concepts, the State (Ministry of Tourism) should work in close collaboration with the regional associations responsible for the development of recreational walking and with the professionals in the field. Each player intervenes in a specific and complementary fashion.

For example, the *Rando'Plume* label and network are managed by an association called "Grand Accueil" ("Grand Welcome"), created by the regional associations in charge of development of walking. Its board of directors evenly comprises representatives of these bodies and *Rando'Plume* operators.

The "Grand Accueil" association promotes the label across France, works to energise and extend the network and coordinates regional actions. Regional "Grand Accueil" associations are in contact with *Rando'Plume* operators and with owners applying for the label, providing technical assistance and organising training sessions.

The funding is also shared: the State financed a greater part of the initial phase of creating the *Rando'Plume* label (analysis of the customer base, drafting of the charter, etc.). The label's management on the ground is financed by the owners who pay a membership fee, by the regional associations and by the local authorities. The local authorities also provide grants to help pay for the work to create establishments or bring them up to standard.

Initial results

- > The experiments and attempts of these past few years have made it possible to compare the theory with customer demand and the constraints of Rando'Plume operators.
- > The specifications or reference terms defining the various concepts now have to be finalised, with the difficulty of standardising informal and personalised ingredients (quality of the welcome, involvement of each owner, etc.).
- > The extension of the Rando'Plume concept beyond mountain areas is another objective. This means the emergence of regional players, similar to the existing development associations, who are able to act in less organised areas.
- > The promotional efforts already being made to market the products will shift into high gear when all the products are consolidated and developed. Among the next steps to be taken are the elaboration of a marketing action plan and a debate on commercialisation. The idea currently being examined is to create a unifying brand for all the different forms of accommodation (gîtes d'étape, Rando'Plume, hotels, campsites).

Contact:

Web: www.rando-plume.com

Walking trips with pack donkeys appeared in France in the 1980s and were the idea of people with different backgrounds and objectives. Mountain guides saw them as an extension of their traditional job as guides. Others, who were livestock farmers, saw the hiring of donkeys as a diversification of their farming activity. Finally, people from the city considered this niche, novel at the time, as a way to support their personal project of moving to the country while developing other sources of income (small fruit, honey, crafts). Little by little, the product developed and the donkey owners had more and more contact with one another. In 1990, the National Federation of Donkeys and Walking Holidays (FNAR) was created.

A potential customer base focusing on the family

The market approach was pragmatic and relevant.

The first initiatives were based on the intuitive perception that the presence of a donkey was a great “plus” for many families interested in walking holidays but faced with the problems posed by having young children. The donkey had the advantage of providing first a material solution by carrying most of the baggage. Second of all, it was an extremely effective way to motivate children who were infatuated with the animals.

Walking trips with a donkey are a response to an extremely strong wish expressed in many surveys: to engage in a family activity that brings satisfaction to

all; the children will remember the donkey, the parents will remember the walk.

In 2000, the cost of hiring a donkey varied between EUR 34 and 46 per day (the equivalent of one night in a bed & breakfast for two) and EUR 198 and EUR 304 per week (the price of a self-catering cottage for 4 people in the intermediate season).

The product's management: donkeys and suitable itineraries, well-informed customers

The quality of the product offered is based on two essential components: the donkeys and the itineraries.

To guarantee a quality service, the owner must have a good knowledge of donkeys and have trained them beforehand to walk with customers: the donkey must be able to carry a packsaddle, follow a trail and be gentle and friendly with its masters of the day. It must be at ease in the company of other donkeys and be sure-footed, particularly in mountain regions, and be in good health to carry loads without causing any damage.

The owner must be able to manage his pack over the seasons, have enough land for grazing, be able to feed the animals and renew the pack. For this reason, most of those who hire out donkeys have become donkey breeders.

The owner has to inform the customers of the animal's needs:

- > plan short sections, given the relatively slow pace at which the animal walks and the amount of time it takes to saddle and unsaddle it;
- > do not load it down with more than 35 kg;
- > plan the itinerary with the owner ahead of time, knowing that the donkey cannot go everywhere (to cross a footbridge over a river can take some subtle negotiating with the animal).

The owner must have an excellent knowledge of the region in order to be able to suggest different itineraries to customers, to satisfy their demand and give good advice.

If the walkers are going to be travelling for several days, the owner must be able to inform them of what accommodation is available in what area, based on their needs: if they want to camp then the campsite has to have a suitable place for the animal (permission can be negotiated with private landowners to camp on their premises), there are also mountain hostels and huts and sometimes bed & breakfasts or even hotels. Some donkey owners have their own accommodation, which may be a hostel or bed & breakfast.

There are no specific rules at the moment governing this kind of business. Although the FNAR does not impose compliance with certain specifications as a condition for membership and does not deliver a quality label, the association nevertheless makes sure that there is a certain level of quality service and that a certain code of ethics is followed with regard to the customers and animals.

Marketing

Promotion

Walking holidays with donkeys have unquestionably aroused a tremendous amount of curiosity in the popular press, and this for many reasons: the novelty and unusual aspect of the product, its presence in little known regions of the interior that are now becoming fashionable, the romantic vision that it conjures up, a family product. Thanks to the widespread publicity it has received in the press, this type of recreational activity has become better known. The Scottish writer, Robert Louis Stevenson, author of *"Travels with a Donkey in the Cevennes"* (1879), has unwittingly helped spread this image very effectively.

With relatively modest means, the FNAR plays an important role in the promotion of this by publishing and distributing 27 000 copies of a brochure listing all the member bodies and by attending national fairs like France's Farm Show or its Fair of Organic Products. Some donkey owners estimate that 40% of their customers come from the FNAR brochure.

An Internet site on all aspects relating to donkeys already exists (<http://www.bourricot.com>), reaching the foreign customer base (8 languages, including Esperanto!). An Internet site more specifically devoted to walking holidays with donkeys is being built.

Each professional also promotes this activity using conventional methods: brochures in tourist offices, municipal tourist information offices or in the places where the walkers stay, inserts in regional press and in specialised walking magazines. Word of mouth and customer loyalty seem important as does networking, considering that people who like the system change regions from one year to the next.

Marketing

Marketing is done directly between the donkey owner and the customer. The FNAR is not involved. The network effect comes into play mostly as a form of solidarity between the professionals who gladly refer customers on to other professionals when they cannot satisfy the demand expressed.

Marketing by tour operators also exists but is marginal, given in particular the family nature of the customer base.

Initial results: a plus for multiple job holders and increased income from tourism

The activity has been steadily growing in the past 4 to 5 years.

Demand is not showing any signs of falling off, especially since a local market is developing around large cities for day trips. The customer base remains limited to the family niche, estimated to represent 90% of demand, which peaks during the school holidays and at weekends.

The product is now spreading to other areas of France: Corsica, the Vosges Mountains. With 49 members in 2000, the FNAR has received 15 applications for membership in 2001 and other service providers operate outside the federation. Besides France, an association has been created in the Belgian Ardennes, offering day trips. The activity is also emerging in Switzerland and Spain, and French donkey breeders have sold animals in Tuscany.

In economic terms, the development of donkey hiring is first a response to the need to diversify activities in mountain and rural areas. For most of the multiple job holders whose main activity is not related to tourism, the donkey holiday business is one more source of income that does not require the creation of a whole new tourist product. It also suits the situation of these professionals, because it allows them to continue their other economic activities. For those donkey owners whose main activity is tourist-related, the donkey is a valuable flagship product at the moment.

On the other hand, in the case of donkey breeding, the market for pack donkeys now appears to be stagnating after a tremendous upsurge a few years ago.

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Web: site under construction

Annex

Walking holiday glossary

Autonomous walking: form of walking where the walker designs and organises his itinerary himself. He is a self-producer (see *tourist product*). Autonomous walking does not mean that services are not consumed but that they are purchased separately. For example, an autonomous walker often consumes overnight stays or a stay where breakfast and dinner are included in the price.

Carefree-walking: a semi-organised walk where the customers walk unaccompanied on an itinerary planned by the tour operator. The product includes accommodation and meals, the transfer of bags from one accommodation to the next and the supply of topographical guides and maps.

Circular walks: itinerary that returns to the departure point. A circular walk can take one hour or several days to complete.

Direct selling: promotion and commercialisation of a product by the producer himself, without a middleman.

Eductour: *“operation aimed to present one or several products to the distributors (tour operators, agencies, etc.), presenting them the whole product or part of it. Eductours are generally organised by the departmental or regional tourist boards in France. The professionals concerned are sometimes asked to help host a tour or to present their services free of charge”.*

Go-as-you-please holiday: *“starting with a basic service (eg. accommodation or activity), the other services are consumed separately.*

“Grande Randonnée” (GR): official term used in France to designate a walking itinerary lasting several days and covering one or more regions, and in some cases countries. For example, there are European itineraries that run from the North Sea all the way to the Mediterranean.

Kit: complete product put together according to the specific requirements of the customer.

Logistician: person responsible for coordinating the stay or tour and making sure that all goes smoothly: material support, transport of bags, transfers, etc.

Niche customer: that part of a customer base with a specific profile of its own, for example, hikers with an athletic profile (synonym: “segment”).

Only: refers to a service sold separately eg. flight only, accommodation only.

Package product: *“the package of services is offered in a non-modifiable form, at a specific time and price”.*

“Petite randonnée”: term used in France to describe a short and easy walk on a marked path lasting 2 to 3 hours.

Producer: structure or person who puts together the services to sell them (see *tourist product*). This may be the service provider himself. For example, a guide who owns a gîte may be a producer if he sells more than just the accommodation.

Provision of a service: sale of a service

Radial walks: series of circular itineraries radiating out from the same departure point. This set-up enables the walkers to do several successive walks without changing accommodation.

“Receptive” agency: travel agency located in a region and specialised in the sale of products from this region. They often concentrate on the marketing of “nature” discovery products and outdoor recreational activities. They vary in their purpose: usually, they act as an intermediary with the tour operators, particularly the foreign ones. They can also distribute to the end-customer. Finally, some are themselves producers. They play an important role in marketing walking products.

Tourist product: *“The tourist product is an assembly of different services, tourist (eg. accommodation and restaurants) or non-tourist (eg. cheese making in a dairy)”.* Tourist production consists in transforming and assembling the raw materials, ie. the services, and offering them on the market as a product accessible to and consumable by a customer.

The notion of “tourist product” therefore implies a commercial action: a walk between friends can be a tourist activity but it is not a tourist product. It becomes so when a process of transformation makes it an organised walk marketed by a professional for a consumer.

Tour operator (or “**travel agent**”): business structure whose purpose is to sell tourist products, either directly through its own distribution network or through retailers or by contracting out to another tour operator.

Workshop: a professional fair for those in the trade. These fairs are places where products are presented to the distributors. They are a perfect time to inform others in the trade about innovations, to discuss business and observe the market.

*The texts in brackets and in italics are translated extracts from: “**La commercialisation des produits touristiques cheval**” (“Marketing of horse tourism products”), published by the Agence Française d’Ingénierie Touristique (AFIT).*

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