

BOWLES GREEN LTD



Monmouthshire Walking Product Development Strategy



Consultants' Report Report

July 2013

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EXECUTIVE SUMMARY

This Walking Product Development Strategy for Monmouthshire aims to:

- Make the most of Monmouthshire's strengths
- Address product deficiencies
- Capitalise on product development opportunities

The methodology for the work comprised six stages of work, as follows:

1. Briefing
2. Research and consultation to inform the strategy
3. Analysis & agreeing a position statement
4. Developing a strategy, including a stakeholder workshop
5. Developing the strategy detail
6. Reporting

Demand for walking comes from both residents and visitors. Walking is by far the most common activity on a day trip to the outdoors in Wales, with most consisting of a short walk (under 2 miles) or walking the dog. Of 2 million tourist visits to Monmouthshire, 450,000 stayed overnight. Most trips involved general sightseeing, visiting cultural and heritage attractions, sampling local food and drink or attending events. Most walking by visitors consisted of gentle strolls and river walks, though some family groups sought more adventurous activity, especially in the Brecon Beacons.

There are a total of 2,127 kilometres of public rights of way in Monmouthshire, 471 kilometres inside the National Park. Half of this network is considered to be 'open'. In addition, there are areas of open access (mostly Forestry Commission Wales managed land and the uplands in the west), and permissive access (for example the Monmouthshire & Brecon Canal). There are also smaller areas of open or permissive access close to towns, at nature reserves, etc.

The Brecon Beacons National Park and Wye Valley AONB have spectacular and protected landscapes and much of the walking trips to the county occur here. The remainder of the County consists of a mosaic of attractive and diverse landscapes including coastal marshes, wide river valleys, rolling hills and the ridges and valleys of the far north.

Facilities for visitors are located chiefly in the main towns, the larger villages and along the main communications routes. Parking, away from the managed sites, and public transport are limited. There are few public WCs outside of the main towns.

There are 611 promoted routes, including 10 long distance routes. These include the Offa's Dyke Path National Trail and the newly designated Wales Coastal Path, plus a variety of locally managed routes. Most of the promoted routes are short walks, but most have no management arrangements and information and waymarking are of variable quality.

Analysis of the current position suggests that:

- There is clear evidence of demand for walking from residents and from visitors
- Encouraging people to walk can help to delivery a range of public policies
- Monmouthshire has an attractive and interesting landscape, suited to easy and moderate grade walking

- There is a strong cultural heritage and quality agricultural produce
- There is good provision of well-maintained, long distance routes
- There are too many leaflets that describe short, circular routes, many of which are poorly maintained or blocked
- Marketing of walking is uncoordinated
- Resources available for management and maintenance are already inadequate and they are set to fall in the future
- There is a willingness amongst volunteers and voluntary sector organisations to contribute to walking and the access network, but they are currently constrained by lack of skills, resources and authority
- There are untapped opportunities for better management of the large number of dog-owning residents and visitors to increase visitor spend and reduce conflict

The main policy drivers for walking are:

- *Health and well-being* – encouraging more people to walk regularly improves health and reduces the cost to the public purse; important at a Welsh Government level
- *Tourism/economic development* – walking is an important tourism market and walking is a popular secondary activity and therefore it is a way to provide visitors with things to do, attract them to particular places and give them access to other themes
- *Community cohesion* – providing people with opportunities to interact, to develop community capacity and pride, and to learn new skills
- *Culture and biodiversity* – helping residents and visitors to understand their natural and cultural heritage, to understand and value their environment
- *Sustainable transport* – reducing dependency on the car and reducing emissions

A vision for walking in the County was agreed, as follows:

“In 2022, a high proportion of Monmouthshire’s residents, including its young people, are walking as a recreation activity, for health and well-being and as a means of transport for short journeys. In addition, the County is one of Wales’s top walking holiday destinations and visiting walkers make a significant contribution to the visitor economy. Residents and visitors can choose from a wide range of promoted walks, with information available digitally and in printed form a single website, from TICs, libraries, pubs & cafés and from tourist accommodation. Dog owners will have access to information and routes that give them confidence to walk in places and ways that minimise their negative impacts on other interests.

The County Council continues to play a strategic role: MCC Countryside provides technical support and training to a network of voluntary and public sector access management groups. MCC Tourism has a strategic role in management and marketing of the destination, including the provision of tourist information services. However, in the future the delivery of destination will be undertaken by Brecon Beacons Tourism and Wye Valley & Forest of Dean Tourist Association Ltd., with support from MCC. An increasing number of residents walk regularly for health and functional journeys”.

Less serious walkers are the primary target market, including residents and visitors. The specific objectives for the strategy are:

- To meet the needs of residents who already enjoy walking and existing visitors who come to walk in the county

- To encourage more of Monmouthshire's residents to walk to improve their health; reduce car traffic and increase local pride
- To encourage more of Monmouthshire's existing visitors to take short walks as a way of discovering and enjoying the County's cultural and natural heritage and its food and drink offer
- To attract increasing numbers of walkers to visit and to spend time and money in the county, making a contribution to the economy and returning home satisfied to recommend visits to their friends and relatives
- To market walking to specific groups, including young people, families with young children, dog owners, people interested in nature, cultural heritage, 'soft adventure' and local, quality food and drink
- To coordinate provision of all aspects of the walking experience, from planning, decision or booking, arrival, information, signing and routes on the ground, organisation and events
- To ensure a network of accessible, well signed and well maintained routes that meet known user needs
- To provide good quality, up-to-date information on routes and other aspects of the product in a ways that meets the specific needs of target markets
- To develop a strong delivery partnership that brings tangible benefits to all partners
- To provide a development framework within which local partners can make decisions about resource allocation to meet local needs and conditions
- To provide technical support and volunteer management to enable local partners to improve and maintain routes, to produce high quality route guides and other information and to deal with problems that arise effectively
- To monitor progress against a set of agreed targets and to review the strategy based on feedback from walkers and delivery partners

A delivery programme is described including a series of actions within four themes:

- Make the most of existing routes
- Develop new 'products' that will appeal to the target markets
- Coordinate management and maintenance effectively
- Coordinate marketing effectively

1 INTRODUCTION

Background

- 1.1 Monmouthshire has an extensive network of access to the countryside; this consists of the public rights of way network, areas of open access and other countryside access, such as permissive routes. Management for users includes national and regional long distance routes (for example Offa's Dyke National Trail and the Usk Valley Way), the recently-opened Wales Coast Path, a whole host of short circular routes (described in leaflets, books, on websites, etc.), areas of open access (for example Wentworth Forest and in the Black Mountains), clusters of walks promoted by local groups (for example at Raglan and Chepstow) programmes of guided walks organised by tour operators, walking clubs, MCC and others), walking festivals and the Walkers are Welcome scheme.
- 1.2 Rights of Way work within the County is guided by the Monmouthshire Rights of Way Improvement Plan. However, whilst much effort has gone into the management and maintenance of rights of way, work to date has been carried out without the guidance of a high level promotion strategy. As a result the walking product in Monmouthshire lacks focus and there are no clearly defined and widely agreed target markets.
- 1.3 The Monmouthshire Destination Development Plan provides a framework for addressing product development issues. The plan has seven product development priorities including development of the Walking Product Development Strategy. Whilst this is clearly a tourism-orientated project, it has the potential to improve the walking product in a way that also delivers benefits in other fields. This is to be delivered in parallel with two Rural Development Plan Wales (RDPW) funded initiatives – Welcome Monmouthshire Walking Products, led by Monmouthshire County Council (MCC), and Sustainable Tourism Walking Products, led by Adventa.
- 1.4 MCC is the lead body for delivering the Walking Product Development Strategy and a programme delivery partnership is proposed. MCC sees the strategy as an opportunity to address wider issues, including the whole of the access network and demand from visitors and local residents.
- 1.5 It is also important to formulate a plan that can be delivered within the resources available for access management during the plan period. In summary, the strategy will address:
- Destination development objectives
 - Countryside access objectives
 - Health benefits
 - Volunteer involvement
 - Community engagement & enablement
 - Equality issues
 - Delivery capacity

Brief

Aim

- 1.6 The aim of the project is to prepare a Walking Product Development Strategy to:

- Make the most of Monmouthshire's strengths
- Address product deficiencies
- Capitalise on product development opportunities

Objectives

1.7 The brief lists a number of objectives, specifically assessing the following:

- The walking product requirements of Monmouthshire's key target visitor markets and segments (as identified in the new destination brand and marketing strategy)
- How well the current and committed improvements to the walking product meets these requirements and how it needs to be improved and further developed to meet them
- Where visitors should be encouraged to walk in the county to maximise visitor spending
- The walking routes that visitors should be directed to in these locations and the points of interest and visitor facilities they should include
- How to maximise the return from the existing and planned investment in countryside access infrastructure, including considering emerging proposals from current RDP axis 3 and 4 projects
- The additional access infrastructure that needs to be in place to ensure that such walking routes offer a high quality walking experience and the investment that is needed to improve and maintain this infrastructure
- The impact on the Pathcare scheme and other voluntary input
- The wider context of access by other countryside access users (including horse riders, cyclists, carriage drivers and motorists)
- How the development of the visitor product relates to the Council's statutory countryside access services, including path prioritisation, equality issues and least restrictive countryside access policy
- How the walking product should be promoted (in a way which is sustainable and considers the available staff resource, budget and channels).
- The opportunities for development of initiatives such as passport schemes to help distribute the benefits of walking product assets more widely
- The opportunities for development of walking product ambassadors (amongst path care maintenance volunteers, walkers are welcome groups and tourism operators)

1.8 The Strategy is to consider all relevant issues including the need for:

- New themed promoted routes
- Clusters of promoted routes around towns and villages so that they can be promoted as bases for walking breaks
- The development of routes linked to public transport
- The development of short routes for health benefits and less able access
- The digitisation of promoted routes for downloadable applications
- Investment in the access infrastructure (including countryside access sites) that supports promoted routes
- The marketing and distribution of promoted routes, including physical and digital means

- The need for links and loops off long distance routes (a lot of work has already been done or is the subject of current projects – requirements for updating and maintaining such links and loops and their access infrastructure will need to be considered)
- How to assess visitor usage of and satisfaction with the county's walking product (in a way which is sustainable and considers the available staff resource, budget etc.)
- The development of related activities, such as geo-caching
- The potential impact and opportunities related to the wider landscape, biodiversity, natural and built heritage
- Better understanding of promoted routes, points of interest and visitor facilities by tourism operators, walkers are welcome groups, path care volunteers etc.

1.9 The geographical area for the strategy is the County of Monmouthshire. The study needs to take account of the responsibilities for access management and for tourism marketing within this area, i.e.:

- Monmouthshire County Council Countryside section manages access outside of the National Park directly
- Access within the National Park is managed by the National Park Authority under an agreement with Monmouthshire County Council
- The World Heritage Site takes some responsibility for walking product development within the WHS boundary
- Tourism marketing in Monmouthshire is led by two tourism associations – Brecon Beacons and Wye Valley & Forest of Dean – with strategic direction and support from MCC Tourism

Methodology

1.10 The work to develop the strategy consisted of six stages, as follows:

7. Briefing
8. Research and consultation
9. Analysis & position statement
10. Strategy
11. Strategy detail
12. Reporting

2 WALKING IN MONMOUTHSHIRE

2.1 This section describes the findings of research and consultation conducted to inform the strategy; it includes:

- Demand (from residents and visitors),
- The walking product
- Tourism provision
- Capacity
- Experience from elsewhere
- The strategic Context

Demand

2.2 There is limited information on the profile of existing and potential walkers in Monmouthshire. However, a considerable amount of information exists that provides an understanding of existing and potential walkers who are residents and visitors.

2.3 Anecdotal information from recreation managers and from participants in the five map sessions held to inform this study suggests that current users have a diverse profile. They include residents and visitors, day visitors and tourists, long and short distance walkers, young and old people.

Profile of Residents

2.4 91,000 people live in Monmouthshire. Key characteristics of the resident population¹ are:

- Growing population (7.6% between 2001 and 2011), and more quickly than the population of Wales (5.5% for the same period)
- Similar proportion of under 16s (17.8%) to Wales overall (18.1%)
- A higher proportion is aged over 65 (20.8%) than in Wales overall (18.4%), and this age group is projected to grow in the next 20 years
- Lower proportion of people of non-white ethnic background (2.0%) than Wales (4.4%)
- Higher proportion of people born outside of Wales (39.6% than Wales overall (27.8%))

2.5 By all measures, this population is advantaged in comparison to the average for Wales as a whole, including:

- Higher proportion of working age residents employed (36.7%) than Wales overall (35.6%)
- Higher proportion of working age residents self-employed (12.0%) than Wales overall (8.6%)
- Slightly higher proportion unemployed (31.7%) than Wales overall (30.5%), but a lower proportion of working age residents unemployed (3.4%) than Wales overall (4.3%)
- Higher proportion of working age residents in higher paid jobs than Wales overall (for example 1.8% managers compared to 9.2% for Wales; 20.3% professional compared to 15.8% for Wales)
- Lower proportion without qualifications (20.7%) than Wales (25.9%)

¹ 2011 Census: Key Statistics for Monmouthshire & Wales

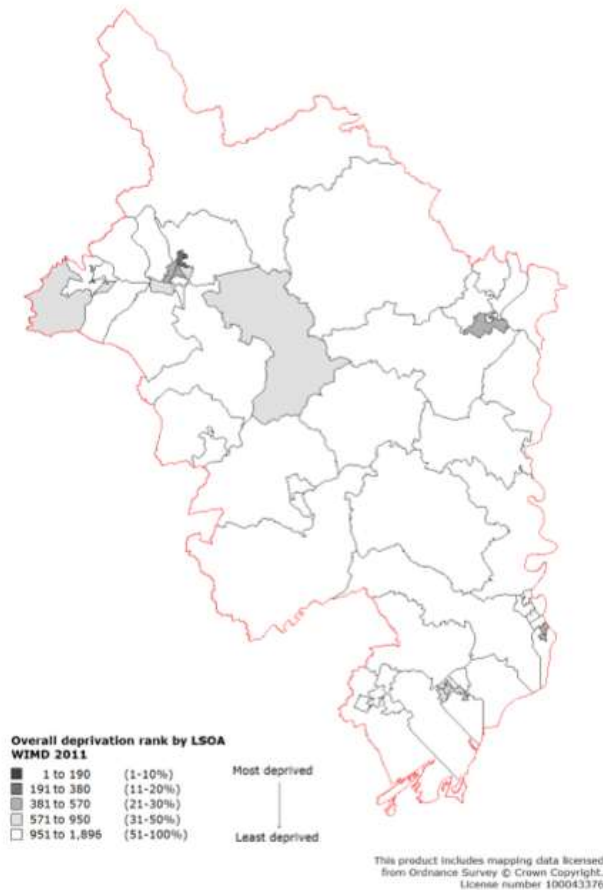
- Higher proportion with level 4 qualifications (33.1%) than Wales overall (24.5%)

2.6 The population of Monmouthshire is healthier than that of Wales as a whole:

- Lower proportion of 16-64's with day-to-day activities limited a lot by health (3.7%) than Wales (5.3%)
- Lower proportion of 16-64's with day-to-day activities limited a little by health (4.7%) than Wales (5.4%)
- Lower proportion of deaths from cancers, heart disease and respiratory disease than Wales
- Lower proportion of smokers, binge-drinkers and overweight people than Wales
- Higher proportion meeting fruit and vegetable guidelines and physical activity guidelines than Wales
- Lower proportion of GP and hospital visits than Wales
- Lower proportion of 65+ age group receiving support from Social Services than Wales, though a higher proportion is in care homes than Wales

2.7 The above is reflected in the Government's measure of deprivation - the Welsh Index of Multiple Deprivation. This considers seven measures – geographical access to services, environment, education, income, housing, health and employment. None of Monmouthshire's 'local super output areas' fall into the lowest 10% in Wales by this index and just 2% are in the top 20 deprived areas. Unsurprisingly for a predominantly rural county, access to services is most frequently, low-scored measure.

Figure 1: Deprivation in Monmouthshire (2011)



Source: Welsh Government

Existing Walking by Residents

- 2.8 Information is available on walking and other visits to the outdoors in Wales from the Wales Outdoor Recreation Survey. Relevant findings are summarised here:

When and Where Do People Go?

- 2.9 88% of people in Wales have visited the outdoors in the last 4 weeks. Over two-fifths of visits were within a mile of the start point (home, work or holiday accommodation) and three in ten were within 1 and 5 miles. People with no access to a car, dog owners and frequent visitors were most likely to travel shorter distances
- 2.10 Woodland/forest (18%) was the most common main destination for a trip to the outdoors and was particularly important for dog owners (22%), those living in rural areas (21%) and those in paid employment (20%). Local parks (12%) were the second most common main destinations followed by hill, mountain and moorland (11%). The average time spent undertaking the main activity was just over 2 hours. This was longer for visits to hills, mountains & moor and to the coast, all areas that tend to be more distant from areas of high population density.

Who Goes?

- 2.11 A higher proportion of women (68%) took part in walking than men (55%) and the proportion walking increased with age, as summarised in the table below.

Table 1: % walking on most recent visit to the outdoors

Age	%
16-24	39
25-34	49
35-54	63
55-74	75
75+	79

Source: Wales Outdoor Recreation Survey, 2012

- 2.12 72% of all visits had no children in the party. Dogs were taken on 40% of trips. Dogs were most common on trips to woodland/forest and to farmland. Car (55%) was the most common mode of transport used to reach the outdoors and walking (35%) the second. Public transport was used by just 4%. This suggests that people without access to a car visit the outdoors less.

Why Do They Go?

- 2.13 Over two-thirds of people who visited in the last 4 weeks identified health as a key reason. The most common reasons for a visit to the outdoors were for health/exercise (26%) and to exercise the dog (25%). The range of reasons is shown below.

What Prevents Them?

- 2.14 The most common constraint to making a visit to the outdoors or visiting more was lack of time or being too busy already (32%); this was most common amongst people in full time employment (49%), people with higher household incomes, those aged between 35 and 54 (46%), the more educated, those with children (40%) and men (13%).

Table 2: Reasons for visiting the outdoors

Reason	%	Comments
Health/exercise	26%	More important to 55-74 year-olds (32%) and men (30%)
Exercise a dog	25%	Motivation for half of visits with a dog
Fresh air/pleasant weather	16%	More important for infrequent visitors (21%) people with children (20%) and women (18%)
Pleasure/enjoyment	16%	More important for infrequent visitors
To enjoy/participate in a hobby	8%	More important to males
To enjoy scenery/wildlife	7%	More important to older visitors
To relax/unwind	3%	More important to young people (25-34)
To get somewhere	4%	

Source: Wales Outdoor Recreation Survey, 2012

- 2.15 Other constraints were weather (11%) – more significant for younger people and those with children, health reasons (7%), disability (4%) and lack of suitable places to go (4%).

Encouraging More Visits

- 2.16 There appears to be strong latent demand for visiting the outdoors; six in ten adults said that they would like to visit the outdoors more often in particular 16-54 year-olds, those with higher household incomes and the more educated. Walking, already the most common activity, was what people would most like to do more of. Beaches and hills, mountain and moor were the places people wanted to visit more.

Walking

- 2.17 The survey shows that walking is by far the most common activity on trips to the outdoors; walking takes place on 87% of visits to the outdoors. It looked at different kinds of walking and who was most likely to participate, as follows:
- Short walk (under 2 miles) – people aged 75 and over (56%), those with no academic qualifications (46%) those with a long term illness or disability (45%); women (45%); those not in paid employment (43%)
 - Dog walking – 35-74 year-olds (42%), those visiting in the first 3 months (41%) women (39%)
 - Long walk, hike or ramble – 35-54 year-olds; those with no children (29%)
 - Hill/mountain walk – dog owner (23%)

Walking and Health

- 2.18 The Countryside Council for Wales (CCW) has conducted further analysis of the health benefits of the outdoors. Whilst these do not specifically relate to walking, as shown above, walking is by far the most common activity. This has identified seven distinct groups of people and the health benefits they derive from the outdoors. These are summarised in the table below.

Table 3: Health Segmentation of Outdoor Visits

Health Benefit	Activity Segment	Definition	Size
None	1. Non-participants	Have not participated in the last 12 months	6% of pop'n c. 140,000 adults
	2. Rare Participants	Have participated in the last 12 months, but not in the last 4 weeks	8% of pop'n c. 188,000 adults
Limited	3. Infrequent; Low Intensity	Participated less than 5 times a week, and at a low level of intensity	21% of pop'n c. 494,000 adults
	4. Frequent; Low Intensity	Participated at least 5 times a week, but only at a low level of intensity	9% of pop'n c. 212,000 adults
	5. Infrequent; Moderate+ Intensity; Less than 150 min	Participated less than 5 times a week, at a moderate to high level of intensity, and for less than 150 minutes per week	26% of pop'n c. 612,000 adults
Maximum	6. Infrequent; Moderate+ Intensity; More than 150 min	Participated less than 5 times a week, at a moderate to high level of intensity, for 150 minutes or more per week	12% of pop'n c. 282,000 adults
	7. Frequent; Moderate+ Intensity	Participated at least 5 times a week, at a moderate to high level of intensity	17% of pop'n c. 400,000 adults

Visitors to Monmouthshire

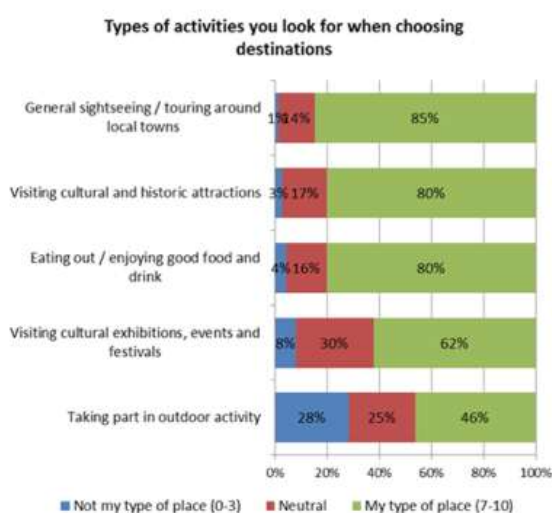
2.19 There were an estimated 2 million visitors to Monmouthshire during 2010 spending £150 million; 450,000 stayed overnight, spending £108m. Tourism supports approximately 3,000 FTE jobs in the County².

2.20 The Monmouthshire Destination Development Plan identifies a number of economic, demographic, social and technological factors from which Monmouthshire could benefit, as follows:

- The staycation market – people switching to holidaying in the UK, rather than abroad and people taking additional holidays/breaks
- An aging UK population – the grey market is growing and has time and disposable income. Recent economic change has, however, affected pensions
- Short breaks – this market continues to grow and Monmouthshire is well-placed to benefit, located close to large areas of population
- Experiential tourism – people increasingly seek experiences rather than places to visit
- Climate change – environmental concerns will increasingly affect destination choice
- Communications – growth of the mobile web for delivering visitor information and booking
- Social networking – as a marketing opportunity

2.21 Research to inform the Monmouthshire Marketing Strategy suggests that the County is perceived more as a place for sightseeing, visiting cultural and heritage attractions, eating out and enjoying food and drink, and visiting cultural events and festivals than for taking part in outdoor activities, and that these are the activities most visitors seek, as shown in the following table.

Table 4: Preferences for Activities Amongst Visitors to Monmouthshire



Source: Monmouthshire Marketing Strategy, 2012

² Monmouthshire Destination Development Plan 2012

2.22 Whilst the Monmouthshire Marketing Strategy identifies target markets for tourism based on the ArkLeisure segmentation model, these are rather broad, and do not help a great deal in prioritising target markets amongst walkers. They are shown in the table below.

Table 5: Target Market Segments for Monmouthshire Tourism

Segment	Characteristics	What	Where and When
Cosmopolitans	Active, independent, sustainable, but like lots of destination types	Food short breaks	Monmouthshire, shoulder season
Discoverers	Enjoy learning about areas and cultures, enjoy physical activity, independent, like to experience a destination from a local's perspective	Hill walking Food short breaks Family activities	Brecon Beacons, Monmouthshire, Wye Valley & Forest of Dean Shoulder and main season
Traditionals	Value good service, like rural areas, enjoy history and heritage, relaxed pace of life	Soft walking Food short breaks	Wye Valley, Monmouthshire Shoulder season
Functionals	Independent, like countryside for activities, fresh air is free	Soft walks Hill walks Food short breaks	Brecon Beacons, Wye Valley, Monmouthshire. Shoulder season

Source: Monmouthshire Marketing Strategy, 2012

2.23 Further analysis of the types places visitors like to visit, by the four main activities identifies show that walking does not feature as an activity sought by most visitors. See table below. However, walking, on a casual basis, is a prerequisite for enjoying many of the types of places identified.

Table 6: Places Sought b the Four Main Tourist Activity Segments

Aspect sought	Places They Like Visiting	Segments
General sightseeing and touring	Villages (88%) Areas of natural beauty (88%) Local viewpoints (87%) Rivers, canals, waterways (85%) National parks (84%) World Heritage Sites (80%) Country parks (74%) Cities and towns (74%)	Widespread interest across many segments
Cultural & heritage attractions	Historic towns (89%) Castles (87%) Ancient monuments & sites (84%) Historic houses (84%) World Heritage Sites (79%) Museums (77%) Gardens (76%)	Widespread interest across demographic groups. Cosmopolitans, traditionals and functionals

	Cathedrals & churches (73%) Industrial heritage (67%)	
Food & Drink	Traditional pubs (88%) Tearooms/cafes (80%) Taste/buy local food (77%) Farmers markets (71%) Farm shops (70%) Family restaurants (64%) Brewery/vineyard tours (61%) Food making tours (60%) Gastro pubs (57%)	Widespread across demographic groups. Style hounds, cosmopolitans and discoverers
Cultural events & festivals	Food & drink events and festivals (73%) Country fairs, events & festivals (71%) Craft events & festivals (67%) Various other events and festivals scored from 58% to 38%	Younger people. Families. Cosmopolitans and traditionals

Source: Monmouthshire Marketing Strategy, 2012

2.24 Those seeking outdoor activity wanted the following specific products/experiences; they tended to be young adults and young families:

- Gentle strolls (91%)
- River walks (90%)
- Forest trails (89%)
- Hill walking/rambling (77%)
- Watching wildlife (71%)
- Various other activities scores 17% - 40%

2.25 The research concludes that the more strenuous the activity (for example hill walking) the more it is likely to be the driver of a visit. Conversely, the less strenuous the activity (e.g. gentle strolls) the more likely it is to be seen as an activity that enhances a visit, rather than the reason for choosing a destination.

Other Destination Markets

2.26 Within Monmouthshire, there are separate tourism strategies for the Brecon Beacons National Park and the Wye Valley AONB, both of which are supported by market research. The profile of visitors to these areas, both of which straddle the Monmouthshire border, are summarised below.

Brecon Beacons National Park

2.27 Research into visitors to the National Park needs to be treated with some caution because of the sampling methodology used; however, it can be assumed that:

- Visitors to the park consist of day and staying visitors travelling independently or in groups
- The most common visitor is middle aged, travelling as a couple and (for staying visitors) staying between 1-3 nights
- Day and staying visitors come chiefly from urban South Wales, Bristol and the M4 corridor and the West Midlands
- A high proportion of staying visitors stays in self catering accommodation
- Half are repeat visitors
- Outdoor activities (soft adventure) are an important motivation to visit and walking is by far the most common pursuit

2.28 Target markets identified for current marketing are summarised here:

- **“Freedom seekers”** / “personal independent explorers” (36-55), who want a short escape from their frenetic metropolitan life in a tranquil, scenic natural environment, with good food and comfortable/stylish accommodation. They may also be interested in the opportunity to participate in a range of other outdoor activities, such as horse-riding, kayaking etc., but this is not the sole or primary purpose of their visit. There is also an opportunity to appeal to the considerable number of people who spent some of their youth on a field trip or family holiday in the Brecon Beacons to return with their partner and/or family.
- **“Outdoor activists”** / “active independent explorers”, particularly **hikers**, followed by cyclists, with an emphasis on a younger age group (20-35) – groups of friends and couples (DINKS = double income/no kids, and SINKS = single income/no kids)
- **Active seniors/“empty-nesters”** (55+) – couples with no children/post family seeking a relaxing quality break in a scenic environment, with a cultural interest.

2.29 The Brecon Beacons Walking Tourism Strategy has the target markets summarised in the table below.

Table 7: Target Markets for Walking Tourism in the Brecon Beacons

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

(Source: Brecon Beacons Walking Tourism Strategy, The Tourism Company)

Wye Valley AONB

2.30 Wye Valley Sustainable Tourism Strategy identifies their main markets as

- Couples
- Wider spread of age groups than some rural areas
- 45% first time visits
- Balance of short and long holidays (high proportion staying in self-catering, caravan and camping accommodation)
- Walking was the main activity (31%)

- Landscape was the most important factor in choice to visit, followed by quality of accommodation and history/heritage
- Most used leaflets and TICs for information

2.31 Tourism businesses in the AONB felt that the following were priorities for management:

- Provision and operation of information centres
- Attracting visitors at less busy times of year
- Upkeep and appearance of the market towns
- Attracting visitors to the area in general
- Providing basic visitor services (e.g. car parking/toilets)

Walkers

2.32 There are many segmentation models for walkers. Most have been developed for tourism marketing purposes. Some of the most useful and relevant material is summarised here.

2.33 Walking is the most common form of active countryside recreation. The UK National Census confirms the findings of the Wales Outdoor Recreation Survey, described above; showing that almost half of all UK residents walk every month and 70% walk at least once a year³. 3%-4% of holidays taken in the UK, by UK residents have walking as the main purpose and 16% of UK holidaymakers walk as an activity during their holiday⁴.

2.34 UK walking holidaymakers display the following characteristics⁵:

- Almost half stay in self-catering accommodation
- 80% of trips take place between April and October
- 60% of trips are of 4 nights or more
- 60% or participants are ABC1s with a higher than average representation of ABs

2.35 There have been many segmentations of the walking market over the years. The following, by Mintel appears to have stood the test of time. The walking market can be sub-divided into the following segments (Mintel 1996/Karrimor 1999). This and a number of other studies have identified the 'opportunists' or casual walkers segment as having the greatest growth potential:

- Opportunists – 60% of the market taking casual walks on the spur of the moment without information, maps or guides
- Ramblers/social strollers – 15% of the market like to walk in groups. Usually members of environmental organisations
- Striders – 2% of the market long distance walkers walking trails from end to end
- Urban stylists – 20% of the market people who associate with the walking image (fleece, boots, outdoor lifestyle and trips)

2.36 Research to inform development of the Welsh Walking Tourism Strategy identified the following three market segments, along with 11 sub-segments:

³ General Household Survey

⁴ United Kingdom Tourism Survey

⁵ United Kingdom Tourism Survey

Table 8: Segmentation of the Walking Holiday Market for Wales

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

(Source: *Best Foot Forward: A Walking Tourism Strategy for Wales 2002-2012*, Wales Tourist Board, 2002)

2.37 'Best Foot Forward', the Wales Walking Tourism Strategy makes some predictions about growth prospects, as follows:

- The primary and incidental holiday walker markets should continue to grow at least in line with the general growth in tourism to Wales
- Growth in the empty-nester market could see above average increases in primary holiday walking
- Growth is likely in both the holiday walking couples and family holiday walker market segments, although could be higher in the couples segment.
- Growth in walking holidays is likely to be strongest for independent centre-based walking breaks. Such holidays already account for the bulk of walking holidays in Wales, and are likely to continue to do so in the future
- Demand for independent point-to-point walking breaks should grow, but is likely to remain at a much lower level than for centre-based breaks
- The market for packaged walking holidays is likely to remain small. It could see some growth, particularly given more proactive marketing
- Demand for independent hill walking breaks should grow, given marketing targeted at the younger audiences for such types of holiday

- The group, walking holiday and day visit markets are likely to remain small, and may not see significant growth. These are already reasonably mature markets that have less potential for growth
- Demand for primary and incidental day visit walking is likely to grow in line with the general growth in day visits to Wales. Such visits will remain the most significant element of Walking Tourism in Wales in volume terms, but will continue to be less significant in value terms
- Overseas walking holidays and holiday walking visits to Wales should grow significantly in line with the projected growth in all overseas visits to Wales
- Overseas walking visitors will remain a much smaller market than domestic visitors, however

2.38 Whilst most segmentation models work on ways of differentiating demographic, lifestyle or economic characteristics, that developed by Visit Wales to deliver information to outdoor enthusiasts is based on the levels of commitment to outdoor activity and information needs at different stages of a journey. It provides a different perspective on outdoor enthusiasts and is helpful in planning information strategies. It identifies four market segments – enthusiasts, dabblers, learners and samplers; these are defined in the table below

Table 9: Summary of Welsh Outdoor Activity Segments

Segment	Description
Enthusiasts	<ul style="list-style-type: none"> ▪ Regularly take part in an outdoor activity (or activities) and are very keen ▪ Experts in activities that have knowledge and skill ▪ Participation in outdoor activities will usually be the primary purpose of their holidays and day trips
Dabblers	<ul style="list-style-type: none"> ▪ Also keen on an outdoor activity (or activities) but who participate only on an occasional basis ▪ Have learned how to undertake their chosen activity (where a degree of skill is needed) and will have some knowledge and skill, but will not be regularly undertaking the activity ▪ Holidays can provide the opportunity to undertake outdoor activities for these people
Learners	<ul style="list-style-type: none"> ▪ Learning an outdoor activity, or seeking to improve their skills
Samplers	<ul style="list-style-type: none"> ▪ Only take part in outdoor activities on a very occasional basis or that are trying out an outdoor activity for the first time ▪ Participation in outdoor activities is not a significant part of holidays or day trips for these people ▪ Tend to take part in outdoor activities very much as unplanned secondary holiday and day trip activities

(Source: Outdoor Wales Information Framework, 2006)

2.39 Research shows that different segments seek information differently. This is summarised in the table below.

Table 10: How Different Segments Use Information

Segment	Research	Planning	Arrival	Duration
Enthusiasts	Research and plan booking of activity	Research and plan independent	-	Information on local conditions,
Dabblers			-	

	packages, accommodation, equipment hire	activity		etc.
Learners		-	-	
Samplers	Research and booking accommodation	-	Obtaining information to plan visit	Obtaining information on what to do next

(Source: Outdoor Wales Information Framework, 2006)

Dog Owners

- 2.40 The Wales Outdoor Recreation Survey (and other similar surveys point to the high number of people who walk with dogs – approximately 40% of trips and 33% of households in Wales have a dog. Whilst there is no information on the number of people taking holiday trips in Monmouthshire with a dog, recent activity by Pembrokeshire National Park and others to cater for the needs of dog-owning holiday-makers show that they are numerous.
- 2.41 Dog owners have very specific visitor needs, be it for the daily dog walk from home or when staying away. Repeated studies have shown that the three most important amenities for dog owners across all socio-economic groups are off-lead access, away from traffic and close to home/accommodation. These comparatively narrow, well-defined and universal needs make marketing to all dog owners relatively straightforward.
- 2.42 Dogs are commonly viewed as a problem by landowners and, over the years, this has led to a climate of negative management approaches to ‘controlling dogs and dog walkers. However, recent experience has shown that positive management of dog walkers can be beneficial for all access users.

The Walking Product

- 2.43 Existing provision for walking is complex and includes a number of aspects. Underlying all provision is the landscape itself. On this, lies the access network, facilities that directly facilitate walking, such as car parks, signage, etc. and that walkers also need on a visit, including places to eat and drink, information and marketing. These are considered in the following paragraphs.

Landscape

- 2.44 The attractiveness of an area for walking depends on many variables. Landscape is a very important factor; it determines the nature of the terrain and other aspects of the wider environment. However the most spectacular landscapes are not necessarily the most popular destinations for walking. A classic example is The Black Forest in Germany; the landscape of the Black Forest is hilly, rolling, mostly pastoral farming and woodland. High quality provision of routes, route furniture, signage, information and walker friendly accommodation and facilities (for example baggage transfer, left baggage facilities) make it significantly more popular with walkers than most of Germany’s alpine regions.
- 2.45 The two best-known landscapes in Monmouthshire are the Wye Valley and the Beacons & Black Mountains; indeed, these form the basis for tourism destination marketing of the County. The soils and habitats of the Black Mountains are sensitive to erosion by walkers

and there is limited opportunity to increase the numbers of walkers here. The landscape of the Wye Valley, on the other hand, is relatively robust and, because of its wooded nature, a large increase in the number of walkers could be accommodated with little negative (environmental, or visual) impact.

- 2.46 Most of Monmouthshire lies outside of these two ‘honeypot’ areas; it consists of chiefly pastoral farmland, with a high proportion of coniferous and deciduous woodland. It is mostly pleasant walking country. A 2003 landscape study⁶ identified the following, nine, particularly significant landscapes (in addition to the National Park and Wye Valley AONB):
- *Caldicot and Mathern Levels* – open, flat coastal lowland. Saltmarsh, sand dunes and shingle at the coast. Historic man-made landscape. Few settlements
 - *Caerwent Hinterland* – undulating, low-lying, wooded landscape. Historic settlement of Caerwent
 - *Eastern Foothills and Escarpments* – lies between the Trellech Plateau and the Usk Valley. Dramatic, hilly landscape with mix of woodland, agriculture and scattered settlement
 - *Usk and Olway Valleys* – major river valley flood plain and river terraces draining most of the County. Intensively farmed; well settled
 - *Western Hills and Lowlands* – undulating area of hills and valleys between the Usk Valley and the western boundary of the County. Includes Llandegfedd Reservoir
 - *Gwehelog Valleys* – complex area of hills and valleys north east of Usk. Woodland and hedgerows remnants of Gwehelog Forest
 - *Raglan and Hinterland* – gently rolling, unspoilt landscape drained by the River Trothy and its tributaries. Panoramic views from Raglan Castle and other high points
 - *Northern Hills and the Trothy Valley* – area of hills, ridges and valleys located between Monmouth and Abergavenny. Includes some significant hills, including the Skirrid
 - *Monnow Valley* – narrow flood plain and sheltered valley sider, with rolling hills giving views into Herefordshire. Several historic settlements, including Skenfrith and Grosmont
- 2.47 The part of the County that coincides with Blaenavon World Heritage Site (WHS) – chiefly the Bloreng and Clydach Gorge – has a strong landscape character. This is an historic, industrial landscape, neglected in recent years, but rich in the remains of early industrial development (settlements, mining, quarrying, tramways, etc.). The Brecon and Monmouthshire Canal also reflects the former industrial character.
- 2.48 Much visitor activity occurs in and around the three towns of Abergavenny, Chepstow and Monmouth. These are historic towns with attractive built environments. In addition, there are smaller, historic towns – for example Usk and Raglan, Caldicot which, though it has a long history is a more modern, urban environment, as well as a large number of villages, many of which have interesting and attractive built environments.

The Access Network

- 2.49 The access network for walking consists of the following:
- Footpaths and higher routes of the Public Rights of Way network (PROW)

⁶ Special Landscape Areas: Draft Supplementary Planning Guidance, 2003

- Open access (designated or dedicated under the Countryside and Rights of Way Act 2000 and included Common Land, mountain moorland and heath and other types of land, such as forestry, dedicated by individual landowners)
- Permissive access (including countryside access sites)

2.50 At present, there is no map of 'total access', showing rights of way, designated, dedicated and permissive access within the County. MCC could consider producing such a map, as it would be useful for management purposes.

PROW Network

2.51 There are 1,656km of PROW in Monmouthshire, outside of the National Park and a further 471 kilometres within the National Park. Most of this (91%) consists of footpaths. In addition there are 71km of bridleway, 84.5km of restricted byway and 1.5 km of byway. The network widely distributed throughout the County with, on paper, good access for walkers.

2.52 In reality, only a limited extent of the PROW network is physically accessible. In 2012 only 51% of the network was considered to be open and easy to use by the public (Performance Indicator Statistic). PROW records show that 211 bridges, 154 stiles, 67 gates and 1375 fingerposts are in need of repair or replacement. There are also known to be 68 recorded surfacing issues, 20 drainage issues, 319 clearance and overgrowth issues, 19 km of alignment issues and 609 enforcement issues. This all affects the quality of the walking or riding experience or prevents it altogether.

Open Access

2.53 Most of the open access in Monmouthshire is on Forestry Commission Wales (FCW) land, located chiefly in the Wye Valley, Trellech plateau and Wentwood Forest. 90% of FCW's land in Monmouthshire is freehold. FCW has an open access policy and provides designated open access on land it owns or manages, unless the owner of leased land dictates otherwise, for example in the north of the County, where the Rolls Estate does not permit FCW to promote access. There are areas of designated access in the upland areas in the west of the County, including The Blorenge, The Skirrid, the Brecon Beacons north west of Abergavenny and the Black Mountains.

2.54 There are smaller areas of open access. Examples include Castle Meadows in Abergavenny and Caldicot Castle Country Park, both owned and managed by MCC, which provide important access close to urban areas.

Permissive Access

2.55 There is no comprehensive record of permissive access in the County. This includes access to nature reserves, canals, rivers, other countryside access sites (e.g. public forest not dedicated as access land and other managed sites) and access, not on PROW that has been negotiated with landowners. Some of the County's promoted long distance routes rely, in part, on such access – including the Usk Valley and Wye Valley Walks.

2.56 In addition, there is 'de facto' access – where people walk, cycle or ride, but where there is no legal right to do so. Whilst probably not extensive, this can be important on a local scale.

Promoted Sites

2.57 Several sites are promoted for countryside access. These include several sites promoted by FCW, which have car parking, forest trails and other facilities. They include Bargain Wood, Chepstow Park Wood, Coppice Mawr Wood, Cuckoo Wood, Lower Wynclyffe Wood and Wentwood). They also include The Old Station Visitor Centre at Tintern, operated by MCC, and Goytre Wharf, operated by the Canal and Rivers Trust. Blaenavon WHS promotes access and provides interpretation at several car parks within the WHS, for example Keepers Pond and Foxhunter car parks on The Blorenge.

Promoted Routes

- 2.58 An MCC database has 611 promoted routes of various kinds within the County, mostly of between 1 and 10 miles; these include the following:
- A variety of long distance routes including
 - Offas Dyke Path National Trail (177 miles, Chepstow – Prestatyn)
 - The Welsh Coast Path (870 miles Chepstow – Dee Estuary)
 - The Wye Valley Walk (136 miles, Plynlimon, Powys – Chepstow)
 - The Usk Valley Walk (48 miles, Caerleon – Brecon)
 - The Brecons Way (98 miles, Abergavenny – Langadog, Carmarthenshire)
 - The 3 Castles Walk (19 miles, start and finish at Skenfrith)
 - The Monnow Valley Walk (37 miles, Monmouth to Charwel Ddu, Herefordshire)
 - The Gloucestershire Way (94 miles, Chepstow – Tewkesbury)
 - The Wysis Way (51 miles, Monmouth – Kemble, Gloucestershire)
 - Tewdrig’s trail (11 miles, Tintern to Mathern)
 - Promoted (circular) routes that are maintained under the Pathcare programme (see table below)
 - Land and Legends Trails (five routes: Great Tre-Rhew/Whitecastle, Tintern/Penterry, Around Rogiet, Magor & Undy and Caldicot Castles & Countryside)
 - Tread and Trot Trails, promoted by Adventa (three existing routes at Dingestow, Whitestone and Tintern, and three new routes being developed in the south of the County)
 - Promoted circular routes that are promoted and maintained (to some degree) by Local Ways projects (Mathern and Raglan)
 - Short routes that are promoted (and in some cases maintained) by other organisations (National Trust, Forestry Commission Wales, Wye Valley AONB, Brecon Beacons National Park Authority, Blaenavon World Heritage Site, etc.) for example the ‘Overlooking The Wye’ trails
 - Promoted circular walks developed by a variety of partners (Community Councils, Tourism Associations, individual businesses) that are not maintained in a planned way
 - Other ‘unofficial’ long distance routes promoted by private individuals, for example the Cistercian Way, which passes through the county and the Monmouthshire Way
- 2.59 The quality of promoted routes varies considerably. The National Trail, long distance routes maintained by MCC and MCC’s Pathcare routes, as well as a number of routes that are managed by other organisations (including the Canal & Rivers trust, Forestry Commission Wales and the National Trust) are in good physical condition and have good quality user information. However, many routes have been devised without the involvement, or in some cases without the knowledge, of access managers, and as a result the quality of route information and the physical access varies considerably.

- 2.60 A good example is the network of routes devised by the Bell Inn at Skenfrith. These were researched and the route information produced by an experienced local walker and the resulting leaflets are of a high quality. However, because there is no provision for maintaining the routes, their physical quality is variable and some are impassable in places at certain times of the year (because of vegetation growth, poor drainage, etc.).
- 2.61 MCC promoted Pathcare routes have recently been rationalized to the 30 shown in the table below plus the Land and Legends and Tread & Trott routes listed above. They were selected on the basis of being in reasonably good condition and providing a variety of walking. Access by public transport and availability of places to buy food and drink were also considered, but there are no clearly defined target markets.

Table 11: Current Pathcare Routes

No.	Name of Route	Length	Community
1	Clytha and Bettws Newydd	9.4 km 5.8miles	Llanarth
2	Clytha Estate	4.9 km 3 miles	Llanarth
3	Raglan Healthy Footsteps	2.3 km 1.41 miles	Raglan
4	Tintern to Penterry	8.5 km 5.3 miles	Tintern
5	St Arvans Roundabout	9 km 5.6 miles	St Arvans
6	Piercefield	8 km 4.9 miles	St Arvans
7	Golden Valley Walk	4.4 km 2.7 miles	Shirenewton
8	Wentwood and Grey Hill	11.5 km 7.1 miles	Shirenewton
9	Monmouth to Redbrook	9.6 km 5.9 miles	Monmouth
10	Llanover and Out!	12.2 km 7.6 miles	Llanover
11	Usk Lady Hill	5.1 km 3.2 miles	Usk
12	Abergavenny to Little Skirrid	5.7 km 3.5 miles	Llanover
13	Abergavenny to Govillon	9.2 km 5.7 miles	Llanfoist
14	Llandegfedd to Coed-y- Paen	9.4 km 5.8 miles	Llangybi
15	Llandogo village	5.1 km 3.1 miles	Trellech
16	Goytre Hall Wood	3.0 km 1.8 miles	Goytre
17	Monmouth Buckholt Wood	9.6 km 5.9 miles	Monmouth
18	Monmouth Kingswood	9.1 km 5.6 miles	Monmouth
19	Penallt Redbrook	6.6 km 4.0 miles	Trellech
20	Llantilio C to White Castle	7.8 km 4.8 miles	Llantillio Crossenny
21	Dingestow	7.4 km 4.6 miles	Mitchel Troy
22	Mitchel Troy to Cwmcarvan	8.0 km 4.9 miles	Mitchel Troy
23	Trellech village	1.7 km 1.0 mile	Trellech
24	Wells and Springs at Trellech	8.6 km 5.3 miles	Trellech
25	Tregare and Penrhos	7.5 km 4.6 miles	Mitchel Troy
26	Llanvetherine to Llangattock Lingoed	8.8 km 5.4 miles	Grosmont
27	Skenfrith to Box Farm	9.4 km 5.8 miles	Llangattock vibon avel
28	Llangybi	9.4 km 5.8 miles	Llangybi
29	Gilwern Clydach	9.8 km 6.0 miles	Llanelly
30	White Swan Skenfrith	8.9 km 5.5 miles	Llangattock vibon avel

Other Provision

2.62 Other provision for walking includes the following and these are summarised below.

- Programmes of guided walks
- Walking events and festivals
- Walking groups
- Walking for health schemes
- Commercial sector

Guided Walks Programmes

2.63 Guided walks programmes are provided by a number of organisations (MCC, WVAONB, BBNPS, WHS, etc.). Whilst these are relatively widely promoted, they tend to appeal to a particular type of person. They tend to be walkers with some experience; the same individuals will usually attend a number of walks in a programme and, they tend to be local residents. Some walks attract different kinds of participants as they are targeted at specific groups (for example young families, people interested in nature, industrial heritage or similar such interest).

2.64 Many of the walks are led by volunteers (e.g. MCC, WVAONB, Walkers are Welcome groups). However, volunteer capacity, administrative capacity and as a result the overall capacity of led walks in the County is limited. Walks programmes appear to be devised to meet a wide variety of objectives, including encouraging people to visit the countryside, interpreting some aspect of the County, encouraging people to visit particular places, promoting the interests of a particular organisation. They are planned in an ad hoc way and occasionally conflict.

Walking Events and Festivals

2.65 A number of walking events and festivals take place within the County. These include:

- The Monmouthshire Walking Festival – programmes of led walks throughout the County in June and October
- Challenge events – for example the Abergavenny 3 peaks challenge walk
- Other charity events – for example Monmouth Rotary Club's 'Walk the Wye' event
- Events that include some guided walks – for example the Abergavenny Food Festival

2.66 Most events are run by volunteers, though some – especially challenge events – are organised by charities or companies that specialise in organising fund-raising challenge events. There have been difficulties with the latter in recent years, especially in the uplands, where poorly organised events have led to erosion, safety concerns and other issues.

2.67 Many walking festivals elsewhere have a single base and this appears to give some advantages in relation to social cohesion. In addition, at present, the Monmouthshire Walking Festival appears to be a little disconnected from organisations that could help to manage and promote it. Other groups (Blaenavon WHS, Chepstow Walkers are Welcome) are considering organising walking festivals. It will be necessary to coordinate dates to ensure that these contribute to, rather than dilute the festival offer in the County that would inevitably further dilute the walking festival/event offer in the County.

Walking Groups

- 2.68 A number of walking groups operate. These include:
- Ramblers Association – Lower Wye Valley and North Gwent groups operate in the County
 - U3A – open to members, over 60; groups in Caldicot, Chepstow, Monmouth, Raglan and Usk run programmes of walks for different abilities
 - Independent groups – for example in Usk
 - Informal groups – not affiliated or organised – usually groups of friends or like-minded people
- 2.69 These operate weekly programmes of walks in and beyond the County. The formal groups (Ramblers and U3A) are membership organisations with administrative structures and some resources. In the main, the walking groups cater for people who are interested in walking, who live in the County and who want to walk regularly in a group.
- 2.70 A number of walking groups based outwith the County also organise guided walks in Monmouthshire, for example Pontypool Ramblers Group and the South Gwent Outdoor Group, based in Newport. Linked to the distribution of urban areas (to the immediate south and west of the County) this demonstrates the important role played by Monmouthshire as a walking destination for residents of neighbouring urban areas.

Walking for Health Schemes

- 2.71 A successful walking for health group has been operating in Abergavenny for several years. This has a large membership and organises social walks every Wednesday, led by volunteers. In addition, MCC has recently established walking for health groups for GP referral patients in Abergavenny and Chepstow. These are also run by volunteers (with support from MCC Leisure Services officers based at the leisure centres) and provide longer walks for people who want to benefit from more strenuous exercise. MCC has also developed a series of health walks around Abergavenny, Chepstow and Monmouth.

Other Providers

- 2.72 A number of walking tour operators promote walking holidays in Monmouthshire on a commercial basis; one of these - Celtic Trails - is based in Chepstow. Gwent Outdoors operates outdoor centres, chiefly for school and other groups of young people at Abergavenny and in the Monnow Valley and some accommodation providers target the walking market – for example Wye Valley and Forest of Dean Tourism Association has developed and promotes a series of 12 walks. There is no overall coordination of walking activity by these organisations, however MCC, Adventa (which has a grant scheme for accommodation providers wanting to develop facilities for walkers), the Wye Valley & Forest of Dean and the Brecon Beacons Tourism Associations and the Walkers are Welcome groups all have interests in developing walking tourism.

Facilities

- 2.73 In addition to the network itself, walkers need or seek a variety of supporting facilities to make their trip. These include:

- A safe place to park, or access by public transport
- Public conveniences
- Places to eat and drink
- Tourists also need places to stay

Parking

- 2.74 Formal car parks are provided by several organisations (MCC, FCW, etc.). They are mostly in towns or at managed countryside sites. Beyond these, walkers generally rely on parking in lay-bys, on road (for example in villages) or on verges. At some locations, lack of parking is already an issue, both at remote sites (for example at the foot of the Skirrid, where parking overflows onto the B4521) and in some villages (for example Llanfihangel Crucorney, where locals complain of inconsiderate parking by visiting walkers).

Public Conveniences

- 2.75 These are limited outside of the main towns. However, at Skenfrith, the Bell Inn provides public conveniences for walkers who are not using the Inn at no charge. Many rural businesses have WCs, but only make them available to patrons. In general, public conveniences are in short supply.

Places to Eat and Drink

- 2.76 Monmouthshire is well served with public houses/inns, tea and coffee shops. The standard of the eating out offer is improving steadily, in line with promotion of the County as a place for local produce. The Walkers are Welcome initiative is increasing the number of accommodation providers catering for walkers. Whilst 'gentrification' of rural pubs is a potential threat to walkers (who tend to require good value fare and who are sometimes discouraged by more expensive eating establishments) many of the latter have successfully combined a high quality food and drink offer with catering for walkers.

Information

- 2.77 There is a good supply of literature (produced by the public and private sectors) on walking in Monmouthshire and this is readily available in tourist information centres and bookshops in the County. There is also a wide range of leaflets on short walks, but, as has already been noted, these are of variable quality and distribution is patchy. The Wye Valley Walk guidebook is now produced by a commercial publisher under licence from MCC. This arrangement provides MCC with in the region of £2,000 of income per year.
- 2.78 It is unfortunate that the County straddles 5 different 1:25,000 scale Ordnance Survey maps – OL13, OL14, 152, 154 and 189.
- 2.79 Similarly, information on walking routes is readily available electronically through the following:
- Official long distance route websites for Offa's Dyke Trail and the Wye Valley Walk
 - www.monmouthshire.gov.uk/walking which has 9 downloadable route guides
 - www.treadandtrottrails.co.uk, which has three downloadable walks

- www.visitwyevalley.com which has over 20 downloadable routes as well as links to other sources of downloadable routes in the Wye and Usk Valleys
- Websites of other organisations which have downloadable routes, for example the Wye Valley AONB, National Trust and Blaenavon WHS
- Websites set up by groups or individuals for specific areas within the County, for example the Raglan Local Ways group (www.raglanlocalways.org.uk) and a private individual who promotes walking around Usk (www.jtallet.co.uk)
- National websites on which subscribers post walking routes, for example www.walk4life.com, www.go4awalk.com, www.walkingworld.com, www.my.viewranger.com, etc.
- Adventa has developed a smartphone app with route guides for three walks

Marketing

- 2.80 At present, marketing of walking in Monmouthshire is not particularly well coordinated. Activity is carried out by a number of different organisations (public, voluntary and private) working at different levels. There is some degree of coordination, through the destination management structures. Within MCC, the Countryside and Tourism departments are working together to manage preparation of this strategy. Organisations involved include:
- Visit Britain – promoting Britain overseas
 - Welsh Government/Visit Wales – promoting Wales in the UK
 - Capital region Tourism – promoting Capital Region
 - MCC Tourism – coordinating tourism policy in the county
 - Tourism Associations – lead on tourism marketing of the County
- 2.81 Requests for information on walking sent to TICs in Monmouthshire by telephone and e-mail met with varied success. Including e-mailed information and a personally addressed letter with supporting information and suggestions of websites to visit from Chepstow TIC.
- 2.82 Web searches for information on walking in Monmouthshire give a number of sites, though none is particularly satisfactory. Most have information on a selection of walks, but there is no single site providing comprehensive information and linked to accommodation and other services.

Tourism Provision

- 2.83 Most tourism provision is located close to the historic towns (Abergavenny, Chepstow and Monmouth – and to a lesser extent, Caldicot, Raglan and Usk), in the Wye Valley AONB and Brecon Beacons National Park and close to the main transport corridors, especially the A40, the M4, the A449 and the A465.

Accommodation

- 2.84 Most accommodation is in small units, with few serviced accommodation establishments with over 10 rooms. Exceptions are hotels at Tintern, the St Pierre Marriott close to Chepstow and hotels in Abergavenny and Usk. There are also large caravan/camp sites, often in clusters, (for example in the Llanfihangel Crucorney/Pandy area, at the foot of the Black Mountains).

Attractions and Activities

- 2.85 There are a large number of historic sites (including castles, Tintern Abbey, the Roman fort at Caerwent, numerous hill forts and other ancient monuments) but their presentation to visitors is not of a particularly high standard, in most cases. There are also a high number of interesting churches and vernacular buildings that compliment the historic landscape. The county also has a high number of local food and drink producers and a small, but increasing number of good quality eating establishments

Capacity

- 2.86 Management of the access network and of walking is undertaken by MCC and by landowners. Statutory duty to maintain the PROW rests with MCC as the Highways Authority. This work includes maintaining the definitive map – the legal document that describes the PROW – for the County, ‘asserting and protecting’ the PROW network through enforcement work and, working with landowners to ensure that signage and route furniture – bridges, stiles, gates, etc. plus other aspects of the network are in a useable condition. It also involves managing some countryside sites and delivering activities to encourage people to visit the countryside, including a guided walks programme and various events.
- 2.87 Resources available to MCC to carry out PROW work are limited. They are insufficient, by some margin, to cover the task of tackling issues on the existing network and the system required to manage it (e.g. digitising the Definitive Map). Through delivery of the Monmouthshire ROWIP in recent years, MCC is working to a more proactive approach to management and maintenance, but this is challenging in the face of a backlog of issues on the network. This includes a scoring system to identify maintenance priorities.
- 2.88 It has also increased capacity to survey and maintain the network by appointing a part time volunteer coordinator and recruiting and training a number of volunteers who carry out such tasks as surveying routes, leading guided walks and undertaking maintenance work. However, volunteer capacity is limited by the time available to manage them and by health and safety concerns.
- 2.89 A number of other organisations are engaged in managing and maintaining access in the County, including:
- The Brecon Beacons National Park Authority – which carries out most prowl functions within the National Park under an agreement with MCC
 - Blaenavon WHS – which promotes and maintains a number of routes within the WHS
 - Wye Valley AONB – which works in partnership with MCC to promote and maintain access routes in the AONB
 - Forestry Commission Wales – which provides and maintains walking and other access routes as well as visitor facilities (car parks, etc.) at a number of locations
 - National Trust – which maintains access routes on land it owns
 - Canal and Rivers Trust – which maintains the canal towpath and visitor facilities associated with it, especially at Goytre Wharf
 - Sustrans – which develops and maintains routes for cycling (also used by walkers)
 - Dŵr Cymru – which is improving public access at Llandegfedd Reservoir

- Town and Community Councils – several have developed routes, information and interpretation; some maintain routes, either independently or under agreements with MCC Countryside
- 2.90 Private landowners are a key audience; their cooperation is needed to develop and maintain high quality access. At present, this audience is not particularly engaged with the process of managing access. Landowners tend to fall into several categories, as follows:
- Those who oppose access and wilfully obstruct public access on their land
 - Those who encourage public access, seeing good signage and routes as the best way to move visitors across their land without causing problems – these are often engaged in diversification projects involving tourism
- 2.91 Groups of walkers and businesses in Chepstow and Monmouth have recently achieved accreditation as Walkers are Welcome towns and a similar group in Abergavenny is in the process of developing an application. Whilst the basic aim of the Walkers are Welcome (WaW) initiative is to attract walkers to a town, individual groups determine their own priorities based on the local situation. They carry out a range of tasks to support walking in a town, from promotion to organising events and maintaining routes. The Monmouthshire groups are relatively new and currently in the process of developing management structures and strategies. However, all three appear keen to take an active role in managing aspects of walking in their vicinity.
- 2.92 During the course of the study, the consultants consulted with a number of Community Councils and found that several were willing to take on maintenance work and other tasks in managing access. The chief constraints appear to be not knowing what to do and not having authority to take action.
- 2.93 It is apparent that there is substantial willingness to volunteer to help develop and maintain the access network for walking but insufficient resources currently, to manage this latent resource.

Strategic Context

- 2.94 Because walking engages a wide range of interests, the strategic context for walking is also complex. However, this does present a number of opportunities to deliver national, regional and local policies, and, in turn, to generate resources for management and maintenance.
- 2.95 The main policy drivers for walking in Monmouthshire are:
- *Health and well-being* – encouraging more people to walk regularly improves health and reduces the cost to the public purse; important at a Welsh Government level
 - *Tourism/economic development* – walking is an important tourism market and walking is a popular secondary activity and therefore it is a way to provide visitors with things to do, attract them to particular places and give them access to other themes
 - *Community cohesion* – providing people with opportunities to interact, to develop community capacity and pride, and to learn new skills
 - *Culture and biodiversity* – helping residents and visitors to understand their natural and cultural heritage, to understand and value their environment
 - *Sustainable transport* – reducing dependency on the car and reducing emissions

2.96 The following strategies and plans guide these areas and have been reviewed during the preparation of this strategy:

- Monmouthshire Local Development Plan (Replacing UDP)
- Other MCC Plans (Community, Children & Young People, Older People, etc.)
- Achieving Our Potential 2006-13 (Mid-term review) (New strategy being prepared)
- Action Plan for the Countryside Experience
- South East Wales Tourism Framework
- Monmouthshire Destination Development Plan
- Monmouthshire Destination Brand and Marketing Strategy
- Brecon Beacons Sustainable Tourism Strategy
- Wye Valley AONB Sustainable Tourism Strategy
- Brecon Beacons Walking Tourism Strategy
- Monmouthshire Rights of Way Improvement Plan (ROWIP)
- Monmouthshire Least Restrictive Access Policy
- Active Travel (Wales) Bill
- Monmouthshire Public Rights of Way Maintenance and Enforcement Prioritisation Policy

3 ANALYSIS AND STRATEGY

3.1 The table below summarises an analysis of the strengths, weaknesses, opportunities and threats relating to walking in Monmouthshire.

Table 12: SWOT Analysis of Walking in Monmouthshire

Strengths	Weaknesses
<ul style="list-style-type: none"> ▪ Location (M4 corridor and easy reach of S Wales, W Midlands and Bristol) ▪ Diverse, attractive landscape, suitable for easy and moderate walking ▪ Rich cultural heritage (buildings, settlements, monuments and stories) ▪ National Park, AONB and World Heritage Site designations ▪ Good supply of visitor accommodation widely distributed around the County ▪ Variety of good eating and drinking establishments ▪ Home to a growing number of high quality local food producers ▪ Well maintained long-distance routes ▪ Terminus for several long distance routes ▪ Established events and festivals ▪ Established walking groups ▪ Established tourism associations and public sector destination management organisations ▪ Walkers are Welcome groups and commitment to support them 	<ul style="list-style-type: none"> ▪ Widely dispersed resident population ▪ Poor interpretation of aspects visitors come to enjoy – culture, heritage, local produce, etc. ▪ Variable quality of the access network ▪ High number of blocked routes ▪ Dispersed information, especially web based ▪ Overwhelming number of short routes ▪ Leaflet and route quality inconsistent ▪ Inadequate resources for management of the PROW network ▪ Inadequate resources for maintenance of access routes ▪ Proportion of landowners opposed to access ▪ Variable-poor access from towns ▪ Insufficient parking at key sites ▪ Limited public transport ▪ Uncontrolled development of new routes with inadequate maintenance provision ▪ Walking festival has no base/focus ▪ No cohesive information for visitors/dogs
Opportunities	Threats
<ul style="list-style-type: none"> ▪ High level of demand from residents ▪ Existing visitors (1.6m day visits and 450k staying visits per year) ▪ High level of dog ownership (linked to fact dog owners walk more than average) and potential to develop routes for dog owners ▪ Supportive policy context ▪ Promote walking as a way to experience culture, heritage and local produce ▪ Growing interest in healthy lifestyle ▪ Interest in active holidays ▪ Volunteers willing to work on the access network ▪ Walkers are Welcome groups ▪ Community Councils willing to develop and maintain the local network ▪ Increase awareness of access opportunities amongst residents 	<ul style="list-style-type: none"> ▪ Reduced funding leads to reduction in quality of the network ▪ Failure to match resources to demand ▪ Proliferation of walking festivals ▪ Better marketing by competing destinations ▪ Failure to promote benefits of walking for health ▪ Failure to make the link between walking and public policy delivery ▪ Loss of public willingness to volunteer and engage

- 3.2 The aim of the project is to prepare a Walking Product Development Strategy to:
- Make the most of Monmouthshire's strengths
 - Address product deficiencies
 - Capitalise on product development opportunities
- 3.3 In order to achieve the above, it will also be necessary to address the threats – in particular falling resources and continuing to compete against increasing competition from other destinations. To do this will require:
- A clear link between walking and public policy delivery, so that public sector funding support for walking is maximised
 - Effective and efficient management structures for:
 - Managing and maintaining the access network
 - Promoting access
- 3.4 In summary, the following conclusions are drawn from the research; their implications for the strategy are discussed below:
- There is clear evidence of demand for walking from residents and from visitors
 - Encouraging people to walk can help to delivery a range of public policies
 - Monmouthshire has an attractive and interesting landscape, suited to easy and moderate grade walking
 - There is a strong cultural heritage and quality agricultural produce
 - There is good provision of well-maintained, long distance routes
 - There are too many leaflets that describe short, circular routes, many of which are poorly maintained or blocked
 - Marketing of walking is uncoordinated
 - Resources available for management and maintenance are already inadequate and they are set to fall in the future
 - There is a willingness amongst volunteers and voluntary sector organisations to contribute to walking and the access network, but they are currently constrained by lack of skills, resources and authority
 - There are untapped opportunities for better management of the large number of dog-owning residents and visitors to increase visitor spend and reduce conflict

Demand for Walking

- 3.5 Analysis of people who already walk in Monmouthshire, and those who could be encouraged to walk – including residents and people who could be attracted to walk in Monmouthshire identified the target markets in the table below, along with their key product needs.
- 3.6 Whilst, in general, the needs of resident and visiting walkers are similar, there are some key differences in how and where they want to walk and the supporting facilities they seek. As a result, demand from residents is segmented by the reason for walking and demand from visitors is segmented by how serious they are about walking and, for casual walkers, what else they seek from a visit.

Table 12: Product Needs of Target Markets for Walking in Monmouthshire

Segment	Sub-segment	Product Needs
Visitors (primary purpose)	Long distance walkers	High quality long distance routes Information on facilities Baggage transfer
	More serious walkers	Network of accessible walking routes in interesting landscapes God quality maps Suggestions for routes (long promoted routes)
	Walking events	Well organised walking festival Well organised challenge events
	Less serious walkers	Short promoted routes
Visitors (secondary activity)	Those seeking cultural heritage	Themed routes linked to cultural attractions and stories
	Those seeking local food and drink	Themed routes linked to local food and drink produce
	People seeking 'soft adventure'	Destinations with choice of 'soft adventure' activities (including walking, orienteering, geo-caching)
Residents	Walking for pleasure	Choice of good quality routes, easily accessible from home
	Walking for health	Selection of health walking routes Programmes of led health walks
	Exercising dogs	Dog friendly routes
	Walking as a group	Walking groups
	Walking for transport	Convenient routes between home, work, shops, school, friends, etc.
	Young people, including schools	Interesting activities based around walking

- 3.7 Monmouthshire's walking product is attractive to long distance walkers and walkers who seek easy to moderate grade walking (as opposed to mountain walking). Linked to the rich landscape heritage, this makes it particularly suitable for the development and promotion of relatively easy, short walks that give people access to and understanding of (interpretation) the cultural heritage of the County and its growing food and drink product, which is produced in the very landscape. This will also help to strengthen interpretation of these themes as a tourism product.
- 3.8 Provision for residents needs to focus on easy to follow, convenient routes located close to or easily accessible from places where people live, that are appealing and so encourage the target segments to participate. Young people are of particular interest because of the potential long term the impact on health and well-being; targeting dog owners crosses both resident and visitor markets, it is a relatively un-tapped visitor market and there is potential to generate management benefits (through better control of dogs in farmed land).

Delivering Public Policy

- 3.9 Attracting people to the County to walk, in the ways summarised above will maximise the contribution of walking to tourism and economic development. Indeed, this strategy is part of a wider initiative to improve the tourism product.
- 3.10 There are clear health and environmental benefits from encouraging more residents and visitors) to walk as a form of regular exercise and in preference to using a car, especially for short journeys.
- 3.11 Developing walks that help to interpret the landscape heritage – both its history and its current management for quality food production, will help to support heritage conservation and the promotion of local produce.
- 3.12 Creating projects in which officers from the public sector work with members of the community to carry out work and make decisions about development and management of the access network will help to build strong and capable communities who are taking ownership of their local environment.
- 3.13 Promoting the positive policy aspects of dog ownership (e.g. the twice daily walking, giving confidence to visit the countryside and developing social capital) while also reducing negative impacts on livestock, wildlife and other visitors by directly providing, and facilitating, better information, provision and peer pressure.

Long Distance Routes

- 3.14 There has been significant investment, by national and local government, in long distance routes. These are a proven way to attract visitor spending in remote areas and already have that effect throughout the County. To maximise the value of this investment, it is advised to continue to market the existing routes.

Short Routes

- 3.15 There are currently far too many short routes. More continue to be developed and, given the ease of posting a route on a website, this is likely to continue if not increase in the future. MCC does not have the capacity to maintain even a small proportion of existing routes, let alone future routes. The current method of prioritisation needs a stronger focus and, ideally, a wider reach, which could be achieved through measures proposed below. Future development and maintenance of short routes needs to be concentrated on routes that meet demand from the target markets, and resources need to be generated for maintenance of routes from those than benefit from them. To achieve this, there needs to be:
- Some form of 'branding' that differentiates maintained routes from other routes
 - A better understanding of the maintenance requirements of marketing routes amongst people who are developing new routes
 - Establishing mechanisms to engage local walkers and local tourism businesses in route maintenance and management

Marketing

- 3.16 With the transfer of marketing responsibility from the public sector to the tourism associations, there is a need to increase awareness and understanding of walking markets and marketing within the tourist associations and amongst businesses that seek to attract walkers. This can be achieved through training programmes.
- 3.17 There is a continuing need for coordination of marketing activity between organisations operating at different levels, and for effective management of all aspects of marketing to ensure that Monmouthshire's walking product continues to meet the needs of its target markets and thereby achieve the strategy aims.

Resources

- 3.18 Given the falling resources available to MCC for access management, it will be necessary to generate resources from other sources. To achieve this, MCC should change the way it operates, from being a 'doing organisation' into being an 'enabling organisation'. It might also need to establish new delivery mechanisms outside of the public sector, but guided and supported by it – much in the way that tourism management has gone in recent years. In this way, MCC can continue to deliver its statutory duties within a context of diminished funding.

Volunteers

- 3.19 Two distinct types of volunteer are currently available – though only the second is engaged in walking in Monmouthshire at present:
- Young people who volunteer to gain experience and skills to help them secure employment
 - Older people who have retired (sometimes early) and who seek things to do to fill their time
- 3.20 The former require a greater level of supervision and training as they lack the experience of the latter group, which are more effective. Whilst, at present, there are relatively high numbers of older volunteers, in the longer term, it is likely that people will be working longer and therefore there will be fewer early retirees who seek volunteering activities.
- 3.21 It would make sense to use this resource whilst it exists, but to monitor volunteering levels and to put in place strategies for coping with a fall in the proportion of older, more experienced volunteers. It would be advisable to explore the training opportunities associated with developing young volunteers and opportunities for pathways to work. In addition, schemes elsewhere in the UK have successfully recruited dog owners and commercial dog walkers as volunteers to promote and secure required behaviours amongst their peers following initial facilitation by local authorities.

Other Access

- 3.22 Whilst most access provision in the County is for walking (as opposed to cycling, horse riding, carriage driving, etc.) and this is a walking product development strategy, any future

development of routes and facilities for walking should seek, where possible, to also improve access for higher users. This could be achieved through:

- Considering the needs of higher users and including provision for them in new route development proposals where possible and appropriate
- Ensuring that all delivery partners take higher users needs into account during route development and maintenance

3.23 No significant evidence of conflicts between different types of users was found during the consultation. In order to maintain this situation, the needs and rights of all users should be promoted to delivery partners and, where possible, to all users of the network.

Strategy

3.24 The following strategy is proposed:

Vision

3.25 In 2022, a high proportion of Monmouthshire's residents, including its young people, are walking as a recreation activity, for health and well-being and as a means of transport for short journeys. In addition, the County is one of Wales's top walking holiday destinations and visiting walkers make a significant contribution to the visitor economy. Residents and visitors can choose from a wide range of promoted walks, with information available digitally and in printed form a single website, from TICs, libraries, pubs & cafés and from tourist accommodation. Dog owners will have access to information and routes that give them confidence to walk in places and ways that minimise their negative impacts on other interests.

3.26 The County Council continues to play a strategic role: MCC Countryside provides technical support and training to a network of voluntary and public sector access management groups. MCC Tourism has a strategic role in management and marketing of the destination, including the provision of tourist information services. However, in the future the delivery of destination will be undertaken by Brecon Beacons Tourism and Wye Valley & Forest of Dean Tourist Association Ltd., with support from MCC. An increasing number of residents walk regularly for health and functional journeys.

Aims

3.27 The strategy aim is to develop a high quality, walking product in Monmouthshire that meets the needs of people who live in and visit the County and want to walk here. The walking product will:

- Provide high quality walking experiences for the range of users
- Deliver health, well-being, tourism, economic, community, transport and learning policy objectives
- Reduce/minimise and negative impacts on farming, wildlife and other interests arising from increased use of the access network

- 3.28 This will be achieved within a climate of public sector spending cuts by taking an innovative approach that includes empowering partners to deliver aspects of promotion, information, route maintenance and management in a coordinated manner.

Objectives

- 3.29 The specific objectives are:

- To meet the needs of residents who already enjoy walking and existing visitors who come to walk in the county
- To encourage more of Monmouthshire's residents to walk to improve their health; reduce car traffic and increase local pride
- To encourage more of Monmouthshire's existing visitors to take short walks as a way of discovering and enjoying the County's cultural and natural heritage and its food and drink offer
- To attract increasing numbers of walkers to visit and to spend time and money in the county, making a contribution to the economy and returning home satisfied to recommend visits to their friends and relatives
- To market walking to specific groups, including young people, families with young children, dog owners, people interested in nature, cultural heritage, 'soft adventure' and local, quality food and drink
- To coordinate provision of all aspects of the walking experience, from planning, decision or booking, arrival, information, signing and routes on the ground, organisation and events
- To ensure a network of accessible, well signed and well maintained routes that meet known user needs
- To provide good quality, up-to-date information on routes and other aspects of the product in a way that meets the specific needs of target markets
- To develop a strong delivery partnership that brings tangible benefits to all partners
- To provide a development framework within which local partners can make decisions about resource allocation to meet local needs and conditions
- To provide technical support and volunteer management to enable local partners to improve and maintain routes, to produce high quality route guides and other information and to deal with problems that arise effectively
- To monitor progress against a set of agreed targets and to review the strategy based on feedback from walkers and delivery partners

Delivery

- 3.24 To deliver this strategy, a programme of actions is proposed below within four broad themes, as follows:
- Make the most of existing routes
 - Develop new 'products' that will appeal to the target markets
 - Coordinate management and maintenance effectively
 - Coordinate marketing effectively

4 DELIVERY

4.1 This final section of the strategy sets out activity required to deliver the above strategy. Table 13, below, shows for each of the target markets and summarises the product development and marketing implications. These are described in more detail in the following paragraphs and the report concludes with an action plan and outline budget.

4.2 Delivery actions are described under the four themes listed in 3.24:

- Make the most of existing routes
- Develop new 'products' that will appeal to the target markets
- Coordinate management and maintenance effectively
- Coordinate marketing effectively

4.3 The Table highlights working with 'Local Ways Groups' as delivery partners. This is the proposed mechanism for community engagement; these are described at para. 4.44. Under this proposal, Local Ways Groups (which could be Walkers are Welcome groups, Community Councils of other, existing or new community organisations) would be empowered to maintain, develop and promote walking routes and activities in their locality.

Table 13: Specific Objectives Target Markets for Walking in Monmouthshire

Segment	Sub-segment	Specific Objectives	Product/Implications	Marketing Implications
Visitors (primary purpose)	Long distance walkers	Provide high quality LD routes Maximise economic impact of LD walkers	On-going maintenance Provide links and loops Encourage & support relevant business development	On-going marketing Market LD routes effectively
	More serious walkers	Provide high quality day walks Create walking destinations	Maintain routes Develop clusters of promoted routes around accommodation centres	Market walking destinations/walking breaks
	Walking events	Strengthen the walking festival Encourage sustainable challenge events Coordinate a single led-walks programme	Bring organisations together to maximise resources Rotate around the County to provide a base and variety Wye Valley Triathlon Develop 'support services' Partnership delivery	Market festival effectively Promote walking in the County to people who visit the festival Promote to charities & groups Promotion plan
	Less serious walkers	Provide short, themed routes close to the tourism infrastructure Work with tourism businesses ad Local Ways Groups	Adapt existing routes Develop new routes using existing rights of way Training, education, toolkit	Promotion plan
	Walkers with dogs	Manage dog walking in a positive way	Barrier-free walks Dog friendly supporting facilities (including accommodation) Education for dog walkers	Promotion plan
Visitors (secondary activity)	Those seeking cultural heritage	Provide short, themed walks linking or close to relevant attractions, businesses, etc.	New route development Maintenance regime	Promotion plan
	Those seeking local food and drink	Work with tourism businesses ad	Training, education, toolkit	

Segment	Sub-segment	Specific Objectives	Product/Implications	Marketing Implications
	People seeking 'soft adventure'	Local Ways Groups		
Residents	Walking for pleasure	Encourage all residents to walk regularly	Provide routes close to urban areas Promotion campaign	Awareness raising
	Walking for health	Encourage all residents to walk regularly		
	Exercising dogs	Manage dog walking in a positive way	Barrier-free walks Dog friendly supporting facilities Education for dog walkers	Promotion plan
	Walking as a group	Support walking groups	Help WaW groups to set up walking groups and programmes	Support Walkers are welcome groups' promotion (training?)
	Walking for transport	Create easy access routes within built areas	Route development	Awareness raising
	Young people, including schools	Encourage young people to take up walking	School walking groups Orienteering, geo-caching and other competitions	Promotion plan

Making the Most of Existing Routes

- 4.4 It is likely that resources available for maintenance will continue to fall short of what is required to maintain the whole of the access network in the future and therefore, some kind of prioritization will remain necessary. In terms of existing routes, maintenance and development should concentrate on making the most of long distance routes and reviewing the existing focus of Pathcare routes.

Continue to Maintain Existing Long Distance Routes

- 4.5 The existing long distance routes are meeting a need (for long distance walking) and contributing to economic development in remote areas. MCC and partners should continue to maintain the current routes, including route condition, furniture, signage and information.
- 4.6 As resources for management reduce in the future, the Council will need to be creative in generating resources. This is considered in relation to route furniture at para. 4.48. In respect of guidebooks and information, the Council should either hand production over to the commercial sector (as is the case for the Wye Valley Walk, for example) or consider generating revenue from information, through the sale of guidebooks, etc. (see para. 4.68)

Develop Loops and Links Based on Existing Long Distance Routes

- 4.7 Continue/build on the Welcome to Monmouthshire (RDP Axis 3) project that is developing links and loops from the Usk Valley Walk and the Wales Coast Path. These should be a combination of:
- Short functional routes that link the long distance routes to facilities sought by long distance walkers
 - Circular routes that link facilities and local points of interest to the long distance routes that can:
 - Encourage day and casual walkers seeking shorter routes who want to walk part of a long distance route
 - Provide long distance walkers with alternative and short route options for use on 'rest day' or to extend their stay
- 4.8 The links and loops will need to conform to the same route standards as the long distance routes themselves; maintenance provision will need to take account of this. They should also, where appropriate, be developed as other themed, promoted routes.

Review Current Pathcare

- 4.9 MCC should review current Pathcare activity in light of this strategy, to ensure that volunteer effort is concentrated on the promoted routes and route clusters proposed. There will also be a need to coordinate existing Pathcare volunteers with the proposed new Local Ways groups to avoid duplication and to ensure that the available existing and new capacity for maintenance is applied effectively and efficiently.

New Product Development

Standards and Criteria for Routes

- 4.10 MCC should continue to manage standards for existing and new promoted routes. Existing standards for route design (MCC Countryside Access Design Guide, BS Standards for access and relevant legislation) should continue to be followed. In addition, some conditions for approval as an MCC promoted route are provided in para. 4.34.
- 4.11 New products recommended in the strategy consist of routes, activities and events. However, in order to secure some form of control over route development, MCC needs a policy to deal with the proliferation of short routes in the County. As noted in the previous section there are already a large number available in printed form and on the internet. Inevitably, more will be developed and old ones will be re-invented by individuals and organisations in the future.
- 4.12 To manage this situation, MCC should:
- Discourage the development of new, promoted routes
 - Establish and apply criteria for promoted routes
 - Work with the new Local Ways Groups to establish maintenance provision for new routes

Discourage the Development of 'Unofficial', Promoted Routes

- 4.13 It will not be possible to discourage all new route development that does not conform to the Monmouthshire promoted route criteria recommended below. However, MCC should do what it can to discourage this activity. MCC should work with the new Local Ways groups to promote good practice in route development, to raise awareness of the need to make maintenance provision for any new routes and to raise awareness of the new promoted route types (see Table 14) and destinations (see Table 15) – for the time period in which they are promoted. Any requests for assistance in developing and maintaining new routes should be referred to the new route types and destinations. The same message should be promoted via a Walking Monmouthshire website (see para. 4.62)

Establish Criteria for Promoted Routes

- 4.14 As noted above, these should include existing and statutory standards. They could also conform to any national standards that might arise from recent work by CCW on promoted routes (Welshways?). In reality, the need for different kinds of trails is likely to vary from place to place and so some combination is likely.
- 4.15 Criteria for 'designation' as a Monmouthshire promoted route should include the following:
- The route must conform to one of the types of walk specified in this strategy (i.e. for which there is known demand)
 - The route must conform to MCC's Least Restrictive Access Policy
 - Route furniture should be in good condition
 - Signage and waymarking should be in place at all decision points
 - Vegetation should be managed to ensure that the route is passable at all times

- Where possible, drainage/surface issues will be managed. Otherwise, information should be available to users on possible problems
- A health and safety audit should have been undertaken
- An agreed maintenance and inspection regime must be in place
- A route guide should be available (this must conform with good practice and be available to download from the Walking Monmouthshire Website as well as locally
- Ideally routes will be accessible by public transport. There should also be adequate car parking close to the start/finish. Where possible, routes should start/finish in or close to settlements or managed countryside access sites
- Where possible, routes should make provision for higher users

4.16 To ensure that new route development also supports the development of route clusters, new route development should be prioritised in the geographical locations identified for clusters. These are listed in Table 15, below.

Establish Maintenance Provision for New Routes

4.17 A maintenance and inspection regime should be devised for each route. The relevant Pathcare group should develop and own this, using a maintenance model provided by MCC Countryside. It should be approved by MCC Countryside and reviewed at regular intervals.

Routes

4.18 It is not envisaged that developing new products will lead to significant further proliferation of routes. In the first instance, existing routes should be 're-branded' or adapted. Some new route development will, however, be necessary.

4.19 New routes should be as follows:

- Health walk/short walk from home
- Functional route
- LD route link or loop
- Short heritage walk
- Short produce walk
- Short nature walk
- Dog friendly walk
- Family walk

4.20 All of the above should conform to the basic requirements of a promoted route (see par. 4.34); the additional requirements are described here.

Health Walk/Short Walk From Home

4.21 Circular walks of 30 mins to 90 mins duration on relatively level terrain (some short ascents are permitted). Ideally these should be free of stiles, but where stiles are present, they should be easy to negotiate and few in number. They should be accessible directly from areas of population, or should be within easy reach (i.e. on a public transport route or within a short drive, with parking). There should be a place close to the start/finish where people can find shelter and obtain food and drinks. Mapping and route descriptions should conform to MCC's existing format – an example is included in the appendix.

Functional Route

- 4.22 Routes that link places people live or stay with nearby places they want to get to. For residents, this might include school, work, the shops, etc. For visitors, these might be routes between accommodation and attractions, restaurants and pubs. Functional routes are the subjects of the Sustainable Travel Bill. However, at the time of writing, there is uncertainty about how this will be applied (for example what constitutes a settlement and where the boundaries of settlements should lie). MCC should monitor progress on the bill and determine the most appropriate way forwards for functional routes once the final proposals are known. Local Ways groups should be encouraged to work with local schools to identify and develop routes to school.

LD Route Link or Loop

- 4.23 Development of links and loops to long distance routes is dealt with at para. 4.7, above.

Short Heritage Walk

- 4.24 Short, circular or out and back routes aimed at casual walkers. It is suggested that they should be of 20-60 minutes, but a degree of flexibility should be adopted here to accommodate local conditions. They must be located in places where visitors already come, or could be attracted to easily. They must incorporate interpretation of an aspect of Monmouthshire's cultural heritage. Interpretation could be through a leaflet (available locally), downloadable route guide, through a smartphone app (see para. 4.71), or in situ. Ideally they would take visitors to cultural heritage sites, or help them to experience some aspect of cultural heritage.

Short Produce Walk

- 4.25 Short, circular or out and back routes aimed at casual walkers. It is suggested that they should be of 20-60 minutes, but a degree of flexibility should be adopted here to accommodate local conditions. They must be located in places where visitors already come, or could be attracted to easily. They must incorporate interpretation of an aspect of local produce for example they might explain some aspect of farming, but they should also be linked in some way to local food producers or outlets. For example they might start and finish at an establishment that serves local food, or they might pass close to a local food producer.

Short Nature Walk

- 4.26 Short, circular or out and back routes aimed at casual walkers. It is suggested that they should be of 20-60 minutes, but a degree of flexibility should be adopted here to accommodate local conditions. They must be located in places where visitors already come, or could be attracted to easily. They must take people to places where they can see, and they must interpret some aspect of Monmouthshire's natural heritage. The same walk might have different seasonal aspects.

Dog Friendly Walk

- 4.27 These could be close to where people live or close to places where visitors stay. They should be free of stiles and, where possible include areas that are free from cattle/horses and away from roads. Places where dogs can run off the lead are to be included if possible. These walks should be aimed at casual walkers and people looking for moderate walking – day or half day walks.

Family Walk

- 4.28 Short, circular or out and back routes aimed at casual walkers. It is suggested that they should be of 20-60 minutes and interesting for children in some way. This could be achieved by including places where there are opportunities for natural play, or by incorporating some kind of trail – for example where family members have to find things, or spot clues, or answer questions.

Table 14: Summary of Promoted Route Types

Walk Type	Location	Length	Key Elements	Key Facilities
Health	Where people live	30 – 90 mins	Level, stile free	Shelter, places to find food and drink
Functional	Where people live	As required	Links to places people want to go	Easy access
LD loop	Link LD routes to facilities and places of interest	As required for links Half day for loops	Visitor facilities Places of interest	Accommodation, places to eat and drink
Heritage	Where people visit	20-60 mins	Cultural heritage interpretation	Cultural heritage features
Produce	Where people visit	20-60 mins	Local produce interpretation	Local producers or outlets
Nature	Where people visit	20-60 mins	Nature interpretation	Nature features
Dog-friendly	Where people live and visit	No limit	No stiles Places dog can run off lead	Dog bins/stick and flick notices as appropriate
Family	Where people live and visit	20-60 mins	Activities for family members	Shelter Place to find food and drink

Walking with Dogs

- 4.29 Providing for walking with dogs is relatively innovative; only a small number of destinations have done this to date. To support walking with dogs, it is recommended that MCC conducts some supporting activity in the form of a pilot project (described in more detail in the appendix) to include the following:

- Establishing 2 pilot areas to develop and promote dog-friendly walks

- Work with tourism businesses and landowners to develop a dog-friendly weekend product
- Promote, monitor and evaluate the pilot project
- If successful, roll out the pilot to the whole of the County

Walking 'Destinations'

4.30 In order to maximise the economic benefits of walking, promoted walking routes should be concentrated around settlements, which are either already, or have the potential to become destinations for visitors. This way, promoted routes will:

- Strengthen the appeal of the County's 'destinations'
- Encourage people to stay longer and therefore spend more
- Pass close to local hospitality and retail businesses

4.31 As clusters of routes aimed at walkers and at casual walkers begin to develop, these will become a basis for marketing, and they will present 'cross marketing' opportunities, where, for example, visitors who have enjoyed a heritage walk at one location could be encouraged to visit others in different parts of the County on the same, or a different trip, especially if they are imaginatively marketed (see below).

4.32 Suggested locations for destination clusters are:

Table 15: Walking Destination Clusters

Area	Sub Locations
Abergavenny and surrounding area	
Chepstow and surrounding area	
Monmouth and surrounding area	
Usk and surrounding area	
Raglan and surrounding area	
Clydach Gorge	
Monnow Valley	Grosmont, Newcastle, Skenfrith
Severn	Caerwent, Caldicot, Mathern
Trellech Plateau	Trellech
Trothy Valley	Dingestow, Llanfihangel-Crucorney, Mitchell Troy
Usk Valley	Goytre Wharf, Llandegfedd Reservoir, Llanover
Wentwood	
Wye Valley	Llandogo, Tintern

4.33 Clustering in this way also opens the opportunity to package a variety of countryside/ outdoor activities from a single place. One of the strengths of resorts such as Centerparcs is that they allow families or groups of friends to take different activities during the day, but to come together socially in the evenings. Developing packages combining opportunities to walk, geo-cache, cycle, ride, canoe, etc. with accommodation at the destination clusters would create a new product for the growing 'soft adventure' market

Activities

Guided Walks

- 4.34 Guided walks available in the County should be made to work harder by appealing more strongly to the target markets and through improved promotion, as follows. In this way they will encourage visitors and residents to walk:
- Guided walks should conform to the criteria for themed walks described above (see Table 14), or they should be themed in some other way
 - They should be encouraged at walk cluster locations (see Table 15)
 - Each walk should have a clearly-defined target market
 - Existing organisations providing guided walks in the County should liaise to avoid duplication, to ensure a choice of walks by date, location and theme, and to ensure that guided walks are available at popular times of the year
 - All guided walks in the County should be promoted through a single website (see para. 4.62)
 - Where possible, guided walks should be developed in liaison with one or more commercial partners (for example a café or pub, who could help promote the walk in return for increased custom)

Other Activities

- 4.35 Walking is much more attractive to young people (and families with children) if it can be combined with another activity. Geo-caching and orienteering. MCC should work in partnership with Gwent Outdoor Centres to expand GOC's existing programme of establishing orienteering courses for schools and to develop geo-caching walks based on existing and emerging promoted routes, which could also be made available to visiting schools.
- 4.36 In the longer term, MCC and Gwent Outdoor Centres should work with the Welsh Orienteering Association to explore the possibility of competitions between schools or youth clubs based on these activities. In the case of orienteering, this could lead to introducing youngsters to national competitions.

Events

- 4.37 The Monmouthshire Walking festival should be strengthened by:
- Changing the format so that it is based, or at least has a focus, in a different place each year. Locations should be rotated around the major visitor destination towns – Abergavenny, Chepstow and Monmouth
 - Organisation should be supported by the three Walkers are Welcome Groups
- 4.38 After the first three-year rotation, other locations could be considered where additional organisational capacity has been established. For example, there are proposals to establish Walkers are Welcome groups in Tintern and Usk.
- 4.39 Other organisations are considering developing and promoting walking festivals in parts of the County (e.g. Blaenavon WHS, Chepstow WaW Group). These groups should be

encouraged to fit in with the proposed re-focussing of the walking festival, and become 'host partners'. Those who do not wish to conform to this approach should be encouraged to develop their events as 'walking weekends', which would ideally be based on a location and or theme and promoted to residents and visitors.

- 4.40 Organisers of other events in the County (especially heritage and local produce-related events) should be encouraged and supported to include one or more guided walks within the individual event programme. These walks should be promoted through the single guided walk programme.

Coordinate Management Activity

- 4.41 In some other Local Authorities, aspects of PROW management have been contracted to the private sector however the outcome has been unsatisfactory and so it is recommended that, until a proven alternative model is established, or legal powers are changed, MCC should continue to:

- Manage the Definitive Map
- Undertake enforcement
- Undertake strategic management of the access network (including strategic monitoring and provision of information through CAMS)

- 4.42 However, it expand the capacity for delivering route development, maintenance promotion and engagement activities as described below. This will address the issue of reducing public sector resources, ensure that public sector resources continue to be used to maximum effect, make the most of volunteer and community capacity currently available and provide a delivery framework for the strategy:

- Establishing a Walking Product Development Group
- Establishing Local Ways groups
- Supporting Local Ways groups
- Seeking resources for future maintenance

Establish Walking Product Development Group

- 4.43 The purpose of this group would be to co-ordinate the (product development and promotion) delivery of the strategy, and to monitor the outcomes. Its membership should include:

- Local Access Forum members
- Organisations that provide access in the county⁷
- Walkers are Welcome groups
- Representatives of the Local Ways groups
- Representatives of the tourism sector⁸

⁷ Brecon Beacons National Park Authority, Canal & Rivers Trust, Dŵr Cymru, Forestry Commission Wales, Gwent Wildlife Trust, National Trust, Sustrans, Wye Valley AONB

⁸ Adventa, Brecon Beacons Tourism Association, Capital Region Tourism, Wye Valley and Forest of Dean Tourism Association

Establish Local Ways Groups

- 4.44 MCC should establish Local Ways groups throughout the County to take responsibility for developing and maintaining 'promoted routes'. They would also 'champion' walking in the local area and help to promote walking routes and activities. Where they exist, Walkers are Welcome groups should take on the responsibilities. In other places, Local Ways groups might be Community Councils, Friends Groups or other community groups/groups of volunteers. These groups would, essentially be the delivery arm of MCC for walking product development. The establishment of groups will depend, to some extent, on the availability of volunteers or others who are prepared to come forwards. However, MCC should proactively seek to establish groups where demand for walking is highest. The locations identified as Walking Destination Clusters in Table 15 provide a framework for these groups.
- 4.45 To do this, MCC will need to encourage local groups to come forwards and then empower them to:
- Agree an area of operation
 - Review existing routes
 - Identify priorities (for maintenance, development and promotion) based on this strategy and the existing condition of local routes
- 4.46 The resulting network of Local Ways groups would provide a delivery mechanism for promoting walking to local residents and to the tourism sector in local areas. Effectively, the groups would play an ambassadorial role for walking in their own communities.

Empower and Support Local Ways Groups

- 4.47 MCC should focus effort on providing technical support to the Local Ways groups. MCC should continue existing management and maintenance activity until Local Ways groups are established. Beyond this time, activity where there is no Local Ways group should be a low priority. MCC should support the new groups by:
- Providing an initial briefing session on the role of the group
 - Providing a toolkit
 - Endorsing annual action plans developed by each group⁹
 - Providing advice on monitoring achievements (route quality, numbers of users, etc.)
 - Providing/secure technical PROW support as required
 - Coordinating a programme of training to increase the capacity of groups in respect of PROW maintenance, development, promotion and on wider activity, such as fund-raising, governance, volunteer management, event management, etc.
 - Ensuring that local groups share experience, ideas and, where appropriate, resources
 - Monitoring activity on an annual basis

Resources

- 4.48 Financial resources available for installing or replacing route furniture are likely to fall in the future. At present MCC has a legal obligation to provide 25% of the cost of replacement route furniture. However, in practice, it often provides 100% as this ensures that replacements are delivered to a standard and that routes can be improved to provide least

⁹ Chepstow and Monmouth Walkers are Welcome Groups are in the process of preparing action plans with assistance from Bowles Green Limited

restrictive access. The value for money achieved could be questioned. Once installed, the furniture becomes the property of the landowner (who might or might not maintain it in good condition) and the cost of commissioning and checking the work is high.

4.49 With diminishing public sector funding it is unlikely that MCC will be able to continue to fund this work. As budgets fall, MCC should focus its financial resources on the maintenance of major structures (bridges, etc.). Funding for less costly maintenance should be sourced through a combination of:

- Landowners, where they can be encouraged to take responsibility
- Fundraising activity by Local Ways groups
- New methods, such as through training/learning programmes (see appendix)
- Ensuring that existing access managers support new routes developed on their land (e.g. Forestry Commission Wales, etc.)

Delivery

4.50 Some kind of restructuring of roles and skillset within MCC would be necessary to deliver this management support role. People who can encourage, enable and negotiate will be required. The following could be considered:

- Appointment of a Local Ways group coordinator
- Developing and maintaining a Local Ways toolkit
- Running an on-going programme of training in access management for Local Ways groups
- Holding an annual conference or event for Local Ways groups
- Setting up a social enterprise/pathway to work project to provide route development and maintenance
- Communicating the strategy and delivery proposals to landowners
- Researching approaches to funding access

Local Ways Coordinator

4.51 The role of the coordinator would be to:

- Promote the Local Ways concept and encourage local groups to come forwards
- Manage coordination of Local Ways groups activities (through their annual action plans)
- Identify Local Ways groups' training needs
- Coordinate a programme of training for Local Ways groups
- Manage the Local Ways toolkit
- Manage the annual conference/event

Walking Monmouthshire Toolkit

4.52 A toolkit should provide information, advice, checklists, case studies and sources of information on the following and it should be provided on-line for ease of maintenance:

- Technical route and PROW information (which could be based on the existing A to Z of Problems, Policies and Protocols)
- New promoted route criteria and how to deliver them

- Developing route information
- Promotion of routes
- Sense of place
- Monitoring and evaluation
- Delivering other activities (events, guided walks, geo-caching, orienteering, etc.)
- Working with local businesses
- Working with landowners
- Technical support from MCC
- Fundraising

4.53 In addition, it should include content to help tourism businesses and associations to compete more effectively in the walking market and to integrate with the Local Ways groups, as follows:

- Marketing to walkers
- Providing for walkers
- How to work with Local Ways groups to develop and promote local walking routes and attract business

Local Ways Training programme

4.54 The training programme should be designed to support the toolkit and to increase identified gaps in capacity amongst Local Ways groups.

Conference/Event

4.55 An annual event should be held for representatives of Local Ways groups to enable them to:

- Discuss issues of interest and concern and agree ways forwards
- Share experience and good practice amongst groups
- Learn from experience from elsewhere (through visiting speakers)

Social Enterprise/Pathway to Work

4.56 MCC should investigate opportunities for supporting young volunteers and helping young people to gain practical access (and countryside) management skills, especially working with local training organisations. Three possible routes to explore are:

- Establishing a training programme with an education establishment, to include practical work and parallel volunteering opportunities
- Working with a training organisation to establish a 'pathway to work' scheme with foundation, pre-apprenticeship, and apprenticeship learning linked to employment opportunities (possibly with local contractors)
- Establishing a community interest company possibly based on one of the Walkers are Welcome or Local Ways groups or a partnership of groups

Landowner Communication

4.57 MCC should communicate the strategy and proposed future management and maintenance proposals with landowners, stressing the benefits to the rural economy of attracting walkers

and the benefits of access to local people. This could be achieved through farming representative organisations. Once established, it would be advantageous to involve the Local Ways groups in this communication to help establish relationships with local landowners.

Researching Funding for Access

- 4.59 Funding for access management will affect all local authorities/access managers. It is recommended that MCC lobby CCW/the new environmental body to fund research into possible sources.

Coordinate Marketing Activity

Information

- 4.60 Information on promoted routes is essential. At present, we are in a period when different kinds of people require either printed or electronic information. The way in which we use mapped information is changing, and little evidenced guidance on the best approach.

- 4.61 As a result, a pragmatic approach is proposed, with the provision of:

- A central website for all information on walking in Monmouthshire
- Downloadable PDF files of information on the promoted walking routes
- Guidebooks for the long distance routes published by commercial sector partners
- Printed route information for promotes themed routes where local groups are able and wish to provide resources, or can fund their production through sales
- Promoted route guides available as smartphone apps

Website

- 4.62 A single website should give access to all information on walking in Monmouthshire. It should have an available to all area that provides information on walking and a 'professional' area accessible by a password by access managers, Local Ways groups, etc. www.walkingmonmouthshire.org is a good domain name and one approach would be to develop this as the main site. Management of the site will require expertise in tourism marketing and access management. At present, only MCC has both of these skills and so should manage the website in the first instance. However, in the longer term, the tourism marketing element could possibly be transferred to the tourism associations.

- 4.63 The public area should include the following:

- Introduction to walking in Monmouthshire
- Downloadable route guides searchable by type of route, location, length of route
- Guided walks and activities searchable by type of walk, date, length of route
- Walking and health walking groups
- Festivals and events
- Links to tourism and other relevant sites
- Elements that encourage people to interact and leave contact details (e.g. photo and other competitions, a blog, etc.)

4.64 http://www.kent.gov.uk/leisure_and_culture/countryside_and_coast/walking.aspx, which provides information on walking in Kent, is a particularly good example, though it would benefit from a more direct domain name.

4.65 The professional area should include:

- The walking in Monmouthshire toolkit
- A forum, where Local Ways groups can ask questions and hold discussions
- Information on training and other useful events
- Time limited pages on specific projects

Downloadable Route Guides

4.66 Information on all promoted routes in Monmouthshire should be available as downloadable PDF files from the main website. A number of different styles have been used for route guides in the County. The use of different design styles should be encouraged as this will help to promote a sense of place. However, styles should be consistent within destination clusters and overall, the route guides should conform to good practice in providing information and mapping for recreation¹⁰.

4.67 MCC has recently developed a style of mapping for its health walks. This method, which combines basic information on the line of the route and boundary crossings overlain on aerial photography, with instructions at decision points, was preferred by health walkers who are not used to reading maps¹¹. It is recommended that MCC apply this or a similar approach to information on the themed walking routes that are targeted at casual walkers.

Printed Route Guides

4.68 Printed route information could be provided free of charge, if Local Ways groups feel that this is justified and they are prepared to fundraise to cover the cost. However, in the interests of longer-term financial sustainability, it is recommended that printed information is provided on a commercial basis. This could be done in three ways:

- Under licence to a commercial publisher – following the example of the Wye Valley Walk route guide
- Walk route leaflets published by Local Ways groups, tourism associations, or the commercial sector (for example the series of walks from The Bell at Skenfrith, which are available for a charge from The Bell)
- Independently by commercial publishers or individuals

4.69 MCC could encourage the supply of locally-produced, printed route guides by making available a grant to fund or part fund production of a first print run, with revenue from sales, advertising and sponsorship generating income for the next print run on an on-going basis. Alternatively, local businesses could be encouraged to fund the initial design and print run.

4.70 A number of commercial walking guides are already available and new ones will be produced in the future. MCC has limited opportunity to influence these, in the same way

¹⁰ See Countryside Mapping Scoping Study, downloadable from <http://bowlesgreen.co.uk/work/countryside-mapping-wales-scotland-england/>

¹¹ Health walkers in Abergavenny

that it has limited influence over walks published on internet walking sites. It should make contact with existing publishers to encourage them to follow good practice and to support the strategy.

Smartphone App

- 4.71 All promoted routes should also be available in a smartphone app. Adventa has developed an app for its existing routes and Visit Wales has an app format for destinations. MCC should establish the most cost effective route and ensure that all promoted routes are included.
- 4.72 Information on walking should also be promoted through social media. This should be through the existing MCC activity in this area and through the proposals for promotion made below.
- 4.73 A recommended promotion plan is described from para. 4.79 below. This supports the strategy objectives for visitors who are walkers and casual walkers, and residents. To support this, a more structured marketing management framework will be required.

Marketing Management Framework

- 4.74 MCC should retain overall strategic control of marketing for walking in the County. It should work in partnership with existing tourism marketing organisations to:
- Promote walking tourism in Monmouthshire
 - Increase the capacity of tourism businesses and organisations in Monmouthshire in relation to walking tourism
 - Monitor marketing and promotion activity

Co-ordinate Marketing Delivery

- 4.75 MCC should coordinate all walking marketing activity and facilitate communication between the partners. It should also establish a monitoring system for walking tourism marketing and feed back the results into future planning. It should do this through the Walking Product Development Group and by working directly with the tourism associations.

Branding

- 4.76 A number of organisations (including some with strong existing brands) are involved in promoting walking in Monmouthshire and, with the new Walkers are Welcome and Local Ways groups, this is set to increase. Some of these organisations use walking as a means of projecting their identity (for example Dŵr Cymru, Forestry Commission Wales and the National Trust) and the new organisations will be keen to make their mark. In addition, there are now two developing brands for tourism in the County, based on the Brecon Beacons and the Wye Valley & Forest of Dean.
- 4.77 At the same time, there is a need to support the products recommended in this strategy through marketing. The public need to be able to recognise and trust a Monmouthshire promoted, walk or event.

- 4.78 To accommodate this, a branding framework is recommended and this is summarised here:
- Tourism promotion should use the Brecon Beacons and Wye Valley & Forest of Dean brands
 - Promoted routes, activities and events should carry a new Walking Monmouthshire brand so that they are clearly identified to users as conforming to a quality standard
 - At the local level, individual access managers, Walkers are Welcome and Local Ways groups can apply their own branding to support sense of place

Promotion Plan

Overarching Philosophy

- 4.79 In order to keep marketing costs to a minimum and to maximise the return on investment of any marketing spend we would advocate proactive and creative PR opportunities in tandem with a targeted social media strategy over traditional paper based advertising opportunities wherever possible. However, in order for Monmouthshire to become a true and achievable paradise for walkers we propose discovering the voices of individual case studies – both locals and visitors alike – who love walking in Monmouthshire or even just the idea of walking in Monmouthshire.
- 4.80 These case studies will take a bit of detective work but should be a mix of those who know the county like the back of their hand, those who have been once or twice, those who have booked to come soon or those who simply just love walking around their home town as well as the apathetic ‘but would like to do some walking’ characters. These case studies will be a mixture of age, gender and ethnic backgrounds but they will all have one thing in common – a desire to count themselves as willing ambassadors across media platforms for the county’s network of local, short and long routes.
- 4.81 These ambassadors would be unpaid but be trained on how to embrace new technology wherever possible, by actively contributing to any Facebook and Twitter feeds set up in support of the campaign (TBC) as well as uploading images via instagram or flickr to encourage and entice others to interact with the Monmouthshire walking product both in terms of its landscape, heritage, pubs, hotels and wildlife. For this campaign to be real it must be fronted and supported by real people.

Visitors – Walking as a Primary Purpose

- 4.82 In this marketplace, Monmouthshire faces stiff competition. It may not be top of mind in terms of this target market’s wish list of walking areas. This may be misguided but also possibly well founded in terms of a lack of a coherent strategy over the years. Monmouthshire is the forgotten corner of Wales but also one of its finest gems in terms of the range of walking opportunities on offer and the variety in its landscape.
- 4.83 PR opportunities primarily involve:
- targeting key walking trade titles with pre-prepared day or longer walks compiled by respected walkers within the county

- targeting television programmes such as Countryfile to focus on walks within Monmouthshire built on human interest stories discovered as part of the case study research
- social media – to start # conversations on Twitter specifically to engage with audiences looking for information or discussions about walking in general and walking in Monmouthshire specifically e.g. #whyhaventyouwalkedmonmouthshireyet, #getyourbootson, #challengingwalksoftheworld2013

4.84 New events could also be considered; ideally these would be organised by Walkers are Welcome and Local Ways groups. There is a role for MCC in encouraging these groups to develop events that are consistent with the strategy and in promoting them. These might include a ticketed event that includes walks in the company of celebrity walkers and local experts.

Visitors – Walking as a Secondary Purpose

4.85 This campaign should dovetail with the overall campaign for the visitor looking for walking as a primary purpose. The difference lies in the amount of emphasis on walking and the reach required to attract this audience. In many ways, this is the hard to reach target audience as they are not obvious in their walking intentions but could be persuaded to do so with the right encouragement. An overarching campaign headline would ease marketing purposes in terms of PR and any advertising, with a suggested tagline of *Walk Monmouthshire – Take your own pace.*

4.86 With this target market we favour more of a catch all philosophy achieved through a high level or targeted case study led PR activity. These could include:

- Features in UK consumer glossy titles from Women's Own to FHM and Country Life involving case studies advocating Monmouthshire as a great place to walk, soak up heritage, escape from the rat race and eat and drink. The angle will always be on the quirky and the unique
- Working with key partners such as Cadw, National Trust and wildlife charities to feature human interest stories about Monmouthshire and its walking opportunities on their websites and external publications
- A fully inclusive competition in partnership with a media partner such as Sunday Times Travel which would be funded by local hoteliers and restaurants to win a short break focused on winter walking in Monmouthshire
- Social media strategy using Facebook and Twitter to raise as much awareness as possible and answer any queries about the wonders of walking in Monmouthshire. The use of # conversations on Twitter is also advocated but more generic such as #monmouthshireforwalks, #walkiesinwales or #takeyourownpace

4.87 To enable tourism organisations and businesses to operate effectively in the walking tourism market, it is recommended that the Walking Toolkit is produced and distributed to interested parties. The toolkit could be produced in electronic format to minimise costs and to ease up-dating. It should be supported by a training course for businesses that could be run on a needs basis. The toolkit should include information on route development and it should encourage tourism businesses to work with their local Pathcare group on route development.

Residents – Awareness of Walking Opportunities

- 4.88 Residents of Monmouthshire require regular reminders not only through feature and news led articles in the local press but also visually in the environment around them. The use of local case studies cannot be emphasised enough in this context but the overall work of researching can be done in essence as part of the previous two marketing campaigns – although the tone may need to be made more ‘local’.
- 4.89 In addition to the wider campaigns for the previous two target audiences we would suggest a public information roadshow, which would involve a ‘promovan’ with an eye-catching design on both sides. Monmouthshire walking staff would be on hand beside the parked van to talk to members of the public, provide information leaflets and sign post interested parties to places to get more information. It would also be a means of gathering information from those attending the roadshow for future marketing efforts. A simple questionnaire could assess the likes and dislikes about walking in general and more specifically in Monmouthshire. The locations would be chosen to match the target audiences whether within school grounds, outside local post offices, churches or major supermarkets. Inevitably there would be a mixture of local residents of all ages but also visitors to the county but this is to be encouraged.
- 4.90 The roadshow is also a great opportunity to identify local characters who would be willing to act as case study ambassadors for the purposes of the campaign and could be integrated into the work of the local Pathcare groups. The van would park in locations in and around Monmouthshire for a set period of weeks during the summer. It could also potentially widen its scope by visiting border counties but this is not essential as part of the first phase of activity. When not stationary it would also travel around the county so that as many people as possible could get sight of the campaign. It could also park in lay-bys popular with walkers both locals and visitors to widen the message.

Monitoring and Evaluation

- 4.91 A system for monitoring the impacts and outcomes of the strategy should be established. This should be the responsibility of the Walking Development Group and, subject to resources, might include the following:
- Installing counters on selected routes (ideally one in each destination cluster) to monitor the overall level of use
 - Counting the number of people walking regularly in groups
 - Counting the number of people walking regularly for health
 - Counting the number of guided walks and participants
 - Counting the number of other events and activities and participants
 - Counting the number of enquiries for walking (via the website, TICs, etc.)
 - Counting the number of route guides sold
 - Counting the number of route guides downloaded from the website
- 4.92 Ideally, additional information would be collected through occasional surveys, which might include:
- Surveying businesses to establish numbers of walkers, dog walkers, etc.
 - Surveying walkers using the promoted routes to understand satisfaction, profile, spending, etc.

- Surveying visitors to events and activities to understand satisfaction, profile, spending, etc.

Delivery Plan Summary

4.93 The delivery plan is summarised in Table 16 below. This shows tasks, delivery partners (with the lead partner identified in italic text) and indicative costs/resources. Tables 17 and 18 show tasks to be implemented by MCC and other partners respectively. To support the delivery plan, further information is provided in the appendix on:

- Training
- Walking Toolkit
- Walking with Dogs

Table 16: Delivery Plan Summary

Strategy	Action	Task	Delivery Partners	Resources
Make the most of existing routes	Continue to maintain Existing Long Distance Routes	On-going maintenance	MCC, ODPNT, access managers	Existing funds and Pathcare volunteers
	Develop loops and links based on LDRs	Develop short functional routes to link facilities	MCC (RDP Axis 3)	
		Develop circular routes	MCC (RDP Axis 3)	
	Review existing Pathcare Routes	Review routes against new promoted route criteria	MCC	Staff time
Develop new products	Establish standards for promoted routes	Discourage development of unofficial routes	MCC	
		Produce and promote specifications for promoted routes	MCC	
	Develop new promoted routes	Secure maintenance for new routes	LWGs, MCC, access managers	Not known
		Develop new promoted routes	LWGs, access managers	
	Walking with dogs pilot project	Conduct pilot scheme	MCC, WaW	£7,500 ¹
		Deliver supporting training	MCC	£2,500 ²
	Develop route clusters as walking destinations	Coordinate development of destinations	MCC, LWGs	Staff time
	Walking activities	Single guided walks programme	MCC, access managers, events	Staff time
		Activities for young people	GO, LWGs	£5,000 ³
	Strengthen the Monmouthshire Walking Festival	Develop the format and management capacity	MWF, WaW, LWGs	Volunteer time
	Include walks on other festivals & events	Encourage guided, themed walks as an element of other festivals and events	Events, MCC	Volunteer and staff time
Promote walking weekends	Prepare a specification for walking weekends. Include in the walking toolkit	MCC, LWGs	Staff time	
Coordinate management activity	Undertake statutory access function	Manage the Definitive Map	MCC	Existing funds
		Undertake enforcement	MCC	Existing funds
		Strategic management of the network	MCC	Existing funds
	Establish a walking product development group	Set up and manage the group	MCC	Staff time
	Appoint a Local Ways Group Coordinator	Job specification, appointment, management	MCC	£35,000 ⁴ p.a.
Establish Local Ways groups	Agree role of groups	MCC	Staff time	

Strategy	Action	Task	Delivery Partners	Resources
		Identify and establish groups	MCC	Staff time
		Prepare initial action plans	LWGs, MCC	Volunteer and staff time
	Empower and support Local Ways groups	Briefing sessions	MCC	Staff time
		Prepare and review annual action plans	LWGs, MCC	Staff time
		Provide on-going technical support, advice, training, etc.	MCC, Adventa (for WaW groups)	Staff time
		Hold an annual gathering of local groups	MCC	Time plus £1,000 ⁵ p.a.
	Walking Monmouthshire Toolkit	Develop and promote toolkit	MCC, Adventa	£10,000 ⁶
	Training programme	Training for Local Ways Groups	MCC	£10,000 p.a. ⁷
		Training for the tourism sector	MCC, Adventa, CRT	£5,000 p.a. ⁸
	Maintaining the PROW network	Focus MCC resources on major structures	MCC	Existing funds
		Fundraising training and advice for Local Ways groups	MCC, LWGs	£5,000 p.a. ⁹
		Explore opportunity to establish a community interest company and/or pathway to work scheme	MCC	Staff time or contract
		Landowner communication	MCC, WaW, LWGs	Staff time
		Lobby for national research into fundraising for access	MCC	Staff time
	Co-ordinate Marketing	Maintain a single website	Explore option to develop www.walkingmonmouthshire.org	MCC, MWF
Establish and manage website			MCC, TAs	£10,000 ¹⁰ set up; £2,500 p.a plus staff time
Promote good practice in route guide design		Include in training programme; include in toolkit	MCC	Included elsewhere
Downloadable PDF route guides		Post to website	LWGs, MCC	Volunteer and staff time
Printed route guides		Secure commercial publisher for long distance routes	MCC	Staff time
		Establish grant or loan scheme and provide fundraising advice for Local Ways Groups	MCC	Staff time; £5,000 ¹¹ self-sustaining fund
Smartphone App		Develop existing app to accommodate new routes	Adventa, LWGs	£5,000 ¹²
Apply walking Monmouthshire brand framework		Develop branding for promoted walks and activities	MCC	£2,500 ¹³
		Apply and manage branding framework	MCC, LWGs, access managers	Staff time
Deliver walking tourism promotion		PR campaign aimed at walkers	TAs	£6-£20,000 ¹⁴

Strategy	Action	Task	Delivery Partners	Resources
		PR campaign aimed at casual walkers	TAs	£6,000 ¹⁵ initial 6 months
		Walking ambassadors & social media campaign	MCC, TAs	£5,000 ¹⁶ ; staff time on-going
		Include tourism content in toolkit and training	MCC	Included elsewhere
	Deliver residents walking promotion	Develop and support walking for health groups	MCC (<i>Leisure Services</i>)	Staff time
		PR campaign aimed at residents	TAs	£15,000 ¹⁷
	Appoint and train local ambassadors	Develop specification, promote concept and appoint	MCC, TAs	Staff time
		Train, monitor and support	TAs	£2,500 ¹⁸ p.a; staff time

Notes on Table 16:

Abbreviations:

CRT – Capital Region Tourism
GO – Gwent Outdoors
LWG – Local Ways group
MWF – Monmouthshire Walking Festival
WaW – Walkers are Welcome

Numbered Notes:

- 1 Estimate for contract (see appendix)
- 2 Estimate for 2 training courses (see appendix)
- 3 Estimate only
- 4 Estimate for annual salary and on-costs
- 5 Estimate for venue, refreshment and speaker costs
- 6 Estimate for contract
- 7 Estimate for one year's training (see appendix)
- 8 Estimate for 3 training courses in a year (see appendix)
- 9 Estimate for production of guidance material and initial advice from fundraiser
- 10 Estimated web development and maintenance cost; assumes day to day changes done by TAs/MCC
- 11 Estimate. Assumes LWGs will pay back initial loans with interest, otherwise, one year only.
- 12 Estimate only
- 13 Estimate for design and notes on application from local designer
- 14 Estimate for initial 6-month campaign; actual cost depends on scale of events
- 15 Estimate for initial 6-month campaign (2.5 days professional PR support per month)
- 16 Estimate for contract to set up network of ambassadors
- 17 Estimate based on activities described above

18 Estimate for 2 training events per year

Access managers refers to organisations that manage access in Monmouthshire
Where LWGs is used in the delivery partner column, this includes the WaW groups

Table 17: Delivery Plan Tasks by MCC

Partners	Tasks – Lead Partner	Tasks – Delivery Partner
Monmouthshire County Council	<ul style="list-style-type: none"> ▪ Maintenance of long distance routes ▪ Work with the private sector to publish route guides for long distance routes ▪ Develop loops and links along long distance routes ▪ Review existing Pathcare routes and activity ▪ Conduct pilot walking with dogs scheme ▪ Provide walking with dogs training ▪ Coordinate development of destinations ▪ Single guided walks programme ▪ Prepare a specification for walking weekends ▪ Manage the Definitive Map ▪ Undertake enforcement ▪ Strategic management of the access network ▪ Set up and manage Walking Product Development Group ▪ Appoint a Local Ways Coordinator ▪ Agree role of Local Ways groups ▪ Identify and establish Local Ways groups ▪ Briefing sessions for Local Ways Groups ▪ Provide on-going technical support to Local Ways groups ▪ Hold annual Local Ways group event ▪ Maintain major structures on the PROW network ▪ Fundraising and training advice for Local Ways groups ▪ Explore opportunity for community interest company and pathway to work scheme ▪ Landowner communication ▪ Lobby for national research into fundraising for access ▪ Explore option to develop existing .org website ▪ Develop and manage website ▪ Include good practice on route design in toolkit ▪ Secure commercial publishes for long distance route guides ▪ Grant of loan scheme for printed route guides ▪ Develop branding ▪ Apply branding framework ▪ Set up walking ambassadors scheme 	<ul style="list-style-type: none"> ▪ Secure resource for maintaining new promoted routes ▪ Encourage event organisers to include guided walks in event programme ▪ Endorse Local Ways groups' action plans ▪ Post PDF route guides to website
MCC Leisure Services	<ul style="list-style-type: none"> ▪ Support walking for health groups based on Leisure Centres 	<ul style="list-style-type: none"> ▪

Table 18: Delivery Plan Tasks by Partners

Partners	Tasks – Lead Partner	Tasks – Delivery Partner
Access managers	<ul style="list-style-type: none"> ▪ 	<ul style="list-style-type: none"> ▪ Maintenance of long distance routes ▪ Secure resource for maintaining new promoted routes ▪ Develop new promoted routes ▪ Single guided walks programme ▪ Apply branding framework
Adventa	<ul style="list-style-type: none"> ▪ Provide support for Walkers are Welcome groups ▪ Develop smartphone app to accommodate new promoted routes 	<ul style="list-style-type: none"> ▪ Develop and promote toolkit ▪ Provide training for tourism sector
Capital Region Tourism	<ul style="list-style-type: none"> ▪ 	<ul style="list-style-type: none"> ▪ Provide training to the tourism sector
Events (non-walking)	<ul style="list-style-type: none"> ▪ Include guided walks in event programme 	<ul style="list-style-type: none"> ▪ Single guided walks programme
Gwent Outdoors	<ul style="list-style-type: none"> ▪ Activities for young people 	<ul style="list-style-type: none"> ▪
Local Ways Groups	<ul style="list-style-type: none"> ▪ Secure resource for maintaining new promoted routes ▪ Develop new promoted routes ▪ Prepare action plans ▪ Fundraise to cover maintenance, promotion and other costs ▪ Post PDF route guides to website 	<ul style="list-style-type: none"> ▪ Develop destinations ▪ Activities for young people ▪ Strengthen the walking festival ▪ Use specification for walking weekends ▪ Attend annual Local Ways group event ▪ Landowner communication ▪ Develop route guides on smartphone app ▪ Apply branding framework
Monmouthshire Walking Festival	<ul style="list-style-type: none"> ▪ Strengthen the walking festival 	<ul style="list-style-type: none"> ▪ Consider development of existing website
Tourism Associations	<ul style="list-style-type: none"> ▪ Deliver PR campaign aimed at walkers ▪ Deliver PR campaign aimed at casual walkers ▪ Deliver PR campaign aimed at residents 	<ul style="list-style-type: none"> ▪ Develop and manage website ▪ Manage walking ambassadors scheme
Walkers are Welcome Groups (in addition to LWG activity)	<ul style="list-style-type: none"> ▪ 	<ul style="list-style-type: none"> ▪ Conduct pilot walking with dogs scheme ▪ Strengthen the walking festival ▪ Landowner communication

APPENDIX

- Appendix 1: Project Brief
- Appendix 2: Walking with Dogs Pilot and Training
- Appendix 3: Training for Local Ways Groups
- Appendix 4: Training for Tourism Sector

APPENDIX 1: PROJECT BRIEF



Request for quotation for:

Monmouthshire Walking Product
Development Strategy

Closing Date/Time:
4PM WEDNESDAY 5th SEPTEMBER 2012

Any queries relating to this request for quotation are to be sent to:

Email: countryside@monmouthshire.gov.uk

Monmouthshire County Council
PO Box 106
Caldicot
NP26 9AN



Monmouthshire Walking Product Development Strategy

I. BACKGROUND

Monmouthshire County Council requires a consultant to prepare a Walking Product Development Strategy to help deliver the authority's Destination Development Plan which identifies walking product development as one of seven strategic programmes designed to make the most of Monmouthshire's visitor product strengths, address the identified product deficiencies and capitalise on the product development opportunities for the Monmouthshire visitor offer.

The purpose of the Monmouthshire Destination Development Plan is to establish a clear framework for public, private and voluntary sector partnership working to address the identified priorities for improving and further developing Monmouthshire's visitor product over the period 2012-2015.

There has been considerable recent investment in aspects of Monmouthshire's countryside access and walking product, both in physical infrastructure and marketing. However this has generally been project led and we now wish to prepare an overall strategy to guide future investment and management.

Whilst primarily driven by the destination development plan process (see Appendix I) we want to ensure that this strategy has a close fit with the Council's wider countryside access objectives, which are principally set out in the Monmouthshire Rights of Way Improvement Plan and so as well as addressing the tourism drivers the strategy also needs to embrace other social, environmental and economic aspects, including health benefits and voluntary involvement. There will also need to be a close fit between the strategy and the Council's statutory countryside access services, including the Council's new path prioritisation system (which prioritises rights of way maintenance and enforcement); and the Council's established "Pathcare" voluntary wardening system.

Although a "walking product" development strategy the strategy needs to address and reflect the wider context of access by other countryside access users (including horse riders, cyclists, carriage drivers and motorists), equality issues and the Council's least restrictive countryside access policy. "Walking Product" and "walks" is shorthand for all of the wider countryside access opportunities. Equally "visitors" is shorthand for external visitors and local demand.

This project is being grant aided by Welsh Government through the Rights of Way Improvement Plan Grant administered by the Countryside Council for Wales and by the regional tourism partnership, Capital Region Tourism, through their destination support scheme.

Additional context is provided in Appendix I.

2. PROJECT TARGET AUDIENCES

- 1) Monmouthshire's Destination Development Team
- 2) Public, private and voluntary sector partners involved in developing and managing walking product

3. KEY OBJECTIVES OF THE PROJECT

To assess:

- The walking product requirements of Monmouthshire's key target visitor markets and segments (as identified in the new destination brand and marketing strategy);
- How well the current and committed improvements to the walking product meets these requirements and how it needs to be improved and further developed to meet them;
- Where visitors should be encouraged to walk in the county to maximise visitor spending;
- The walking routes that visitors should be directed to in these locations and the points of interest and visitor facilities they should include;
- How to maximise the return from the existing and planned investment in countryside access infrastructure, including considering emerging proposals from current RDP axis 3 and 4 projects;
- The additional access infrastructure that needs to be in place to ensure that such walking routes offer a high quality walking experience and the investment that is needed to improve and maintain this infrastructure;
- The impact on the Pathcare scheme and other voluntary input;
- The wider context of access by other countryside access users (including horse riders, cyclists, carriage drivers and motorists);
- How the development of the visitor product relates to the Council's statutory countryside access services, including path prioritisation, equality issues and least restrictive countryside access policy;
- How the walking product should be promoted (in a way which is sustainable and considers the available staff resource, budget and channels).
- The opportunities for development of initiatives such as passport schemes to help distribute the benefits of walking product assets more widely.
- The opportunities for development of walking product ambassadors (amongst path care maintenance volunteers, walkers are welcome groups and tourism operators)

The Strategy will need to consider all relevant issues including the need for:

- New themed promoted routes;
- Clusters of promoted routes around towns and villages so that they can be promoted as bases for walking breaks;
- The development of routes linked to public transport;
- The development of short routes for health benefits and less able access;
- The digitisation of promoted routes for downloadable applications;
- Investment in the access infrastructure (including countryside access sites) that supports promoted routes;
- The marketing and distribution of promoted routes, including physical and digital means;

- The need for links and loops off long distance routes (a lot of work has already been done or is the subject of current projects – requirements for updating and maintaining such links and loops and their access infrastructure will need to be considered);
- How to assess visitor usage of and satisfaction with the county's walking product (in a way which is sustainable and considers the available staff resource, budget etc.);
- The development of related activities, such as geo-caching.
- The potential impact and opportunities related to the wider landscape, biodiversity, natural and built heritage;
- Better understanding of promoted routes, points of interest and visitor facilities by tourism operators, walkers are welcome groups, path care volunteers etc.

4. KEY STAKEHOLDERS

- Relevant officers and elected members of Monmouthshire County Council, including officers with responsibility for managing the countryside access network, promoting walks and managing the Council's tourism functions.
- The Countryside Council for Wales and Capital Region Tourism as funder
- Local businesses and tourism operators who rely on the county's walking product
- Voluntary sector interests including Walkers are Welcome Groups, the Monmouthshire Walking Festival Group and other countryside access groups.
- The Monmouthshire Local Access Forum.
- The Wye Valley AONB Partnership and the Brecon Beacons National Park Authority.

5. REQUIRED OUTPUTS

A fully integrated Walking Product Development Strategy, making recommendations and containing a fully costed and prioritised action plan for walking product development. The strategy needs to show clear links with both the Destination Development Plan and the Destination Brand and Marketing Strategy; and with the Rights of Way Improvement Plan.

The Study document should be presented as A4 reports in Microsoft Word with plans / drawings at suitable scales and page sizes in PDF. It should be submitted both in hard copy (2 in number) and in digital format [email and CD Rom].

APPENDIX 2: WALKING WITH DOGS

Pilot Project(s)

Dog friendly walks could be developed through pilot projects. Development of two pilot dog-friendly destinations within the county will allow the concept to be established, while minimising risk and exposure. The pilot's experiences and success will then give both confidence and specific guidance to other areas.

The research phase has identified two areas where demand for dog-friendly walks and facilities is already seen as a visitor need to address (Monmouth and Chepstow). It is suggested the pilot runs in both of these areas, for economies of scale and in recognition of the different characteristics of areas within the county.

For visitors, the outcome is a menu for a complete short break or weekend dog package, making it easy for owners and their pets to have a different quality, circular walk each day, with dog-friendly refreshments on route, based at accommodation offering dog-friendly facilities and local knowledge on great places to visit and how to avoid conflict.

Proposed Process

1. Workshops to raise awareness assess interest and engage support (x3 in each area: local dog owners; service/accommodation providers; land managers/rangers). Note - the outcome of this will influence the following stages proposed as:
2. Baseline assessment of current provision in pilot areas (to enable identification of improvements)
3. Liaison with Forestry Commission and other major landowners to identify quick wins on existing, under-promoted dog-friendly routes
4. Identification of commercial sponsors and partners within the area (e.g. vets, country stores, service providers, etc.)
5. Develop dog-friendly criteria with associated provider training and checks – initially via specialists to build local capacity and maintain scheme
6. Develop dog-friendly destination brand and package (print, online, app, social media) for pilot areas (minimum 7 walks, nearby facilities and accommodation).
7. Development of management and signage guidance for land managers and councils to ensure offer is reflected on the ground, especially on promoted routes
8. Updating of general visit offer to dog owners on county tourism publications and other websites, complemented by social media for contact between dog owners (managed locally)
9. Incentivised media launch within canine media and social networking sites
10. Evaluation of improvements against baseline provision. Updated guidance and resources produced for other aspiring areas.

Proposed Training

Two levels of training should be offered: training courses for businesses and organisations that wish to become dog-friendly, and individual support for businesses, as follows:

Dog Friendly Training Course

The course would provide information and strategies for businesses and sites that want to attract the walker/dog-owner market. It would include:

- The market: Dog owners – who are they and what do they want?
- Marketing to dog-owners
- Making your product dog-friendly
- Examples from elsewhere

Individual Support

Individual support could be made available to businesses and sites that want to become walker/dog friendly, to provide tailored advice on action.

APPENDIX 3: TRAINING FOR LOCAL WAYS GROUPS

Local Ways groups will need training and guidance support in the following areas:

- Access management – the legal framework, management and other context
- Maintenance methods
- Planning and developing promoted routes
- Marketing

They would also benefit from networking events amongst groups.

Suggestions for the content and delivery of training and guidance are summarised in the tables below.

Access Management Training

Content	Provider	Aim
- Legal framework for public access - The work of the County Council (definitive map, enforcement, etc.) - Legal implications for Local Ways Groups - Summary of support/system of working with MCC	MCC	To provide sufficient information so that groups understand the legal responsibilities of Highways Departments and how they fit into the process

Maintenance Methods

Content	Provider	Aim
Surfaces and drainage Furniture Vegetation Signage and waymarking Major structures Working with contractors Summary of support from MCC	MCC	To provide groups with an understanding of how they can maintain routes

Promoted Routes Training

Content	Provider	Aim
Understanding demand and use Maintenance implications Waymarking Route finding Interpretation Involving partners	MCC, Adventa/CRT	To provide an understanding of the purpose and implications of promoted routes

Marketing

Content	Provider	Aim
Marketing to walkers Product development options (routes, events, etc.) Marketing Monmouthshire for walking The walking product development strategy Partners who groups can work with Working with tourism businesses	MCC, Adventa/CRT	To provide an understanding of local benefits and how to achieve them through access management and promotion

MCC should provide a toolkit for Local Ways Groups to cover the above and provide additional information and sources. The toolkit should be an on-line publication so that it can be kept up-to-date.

Networking

Opportunities for Local Ways Groups to network should be encouraged, the following are suggested:

Annual Conference – to discuss issues of interest, share experience, etc.

Reciprocal Visits – day or half day sessions at one location so that representatives other groups can visit to see and discuss activities

One-off Courses/events – ad hoc events (training courses, visits, visiting speakers, etc.) organised in response to needs identified by the groups

APPENDIX 4: TRAINING FOR THE TOURISM SECTOR

This should be delivered through existing tourism organisations. Training courses should be supported by a toolkit for walking tourism, available on-line. The courses and the toolkit should include the following:

The Walking Market

- Volume and value
- Walking market segmentation
- What do walkers want? What do they spend?

Provision for Walkers

- The access network (Legal aspects, PROW, other)
- Managing the access network (MCC, Local Ways Groups)
- Information
- Events, etc.

Marketing to Walkers

- Strategy
- Opportunities
- Developing your approach
- Being walker friendly

Developing the Product in Monmouthshire

- Summary of the Walking Product Development Strategy

Marketing Monmouthshire

- Summary of marketing activity
- How to participate