

Entering the European market for walking tourism products

Last updated:

11 October 2021

Walking tourism products appeal to European travellers of many abilities, from challenging, difficult routes to easy trails with gentle gradients, and can last from a few hours to a week or more. Good guides and establishing good safety protocols for hiking are an important consideration, as are detailed maps and instructions for self-guided walks. It is also important that walking tourism products are established under sustainable principles to protect the environment and support local communities.

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1. What requirements must walking tourism products comply with to be allowed on the European market?

European tour operators that sell walking tourism products to Europeans are bound by strict regulations to ensure the safety of their travellers and to protect them financially. Sustainable tourism is also an issue that is becoming more important to buyers, both European tour operators and European travellers. You should understand what these regulations are.

What are the mandatory and additional requirements that buyers have?

The requirements that European tour operators have for walking tourism products in developing countries are based on the following:

- The European Package Travel Directive
- The General Data Protection Regulation (GDPR)
- Liability insurance and insolvency protection
- Sustainability and responsible tourism

As a first step, you should read CBI's [What requirements must tourism services comply with to be allowed on the European market](#) (specifically section 3, What are the requirements for niche markets) and familiarise yourself with the comprehensive details of legal, non-legal and common requirements.

COVID-19: Preparing to reopen following the pandemic

In the summer of 2021, the COVID-19 pandemic continued to have a considerable impact on the tourism industry worldwide. The rules for travelling to and from Europe are complex and every country has imposed different regulations for outbound and inbound travellers. Most European countries identify other countries as

green, amber or red-list destinations, with red-list countries subject to the strictest regulations, such as compulsory quarantine in government facilities and travel for leisure forbidden.

This affects returning residents from countries such as India, South Africa and Brazil, where new virus variants pose a significant threat. Neighbouring countries, such as Bangladesh, countries in southern Africa and other South American countries tend to be under similar restrictions.

Travel within the EU for European nationals has become easier with the introduction of the EU Digital Covid Certificate of Vaccination. UK travellers are subject to different restrictions within Europe, as the UK is no longer a member of the EU. However, every country has different rules and you should do your own research to find out what they are.

- [Re-open EU](#) is an interactive tool developed by the European Union (EU) to provide information about the current COVID-19 situation in each country. It is regularly updated and provides the latest information about the health situation, coronavirus measures and travel information.
- Keep abreast of advice given to UK nationals about travel to red, amber and green-list countries on the government's [Foreign Travel Advice](#) page.
- Consult IATA's [interactive travel restrictions map](#) for travel restrictions in most other countries. You should also be aware of the restrictions placed on inbound travellers to your own country and keep checking in the event of any developments. Visit your own country's government website to find out more.

As national vaccination programmes around the world continue to gather pace, the tourism industry is optimistic that it will see recovery to some level in 2021. Domestic tourism will be the first segment to recover. In the short term, this will offer local tour operators the chance to reach out to local markets. This is likely to be followed by increased travel to short-haul destinations. For Europeans, this means travel to a neighbouring country on the continent.

Long-haul travel to developing countries is likely to recover more slowly and travel abroad will depend on conditions of entry imposed on visitors and safety protocols. Research shows that demand for travel is very high in Europe, particularly among adventure travellers.

A survey in early 2021 among British and American tourists found that [70% plan to take a holiday this year](#) but that COVID-19 worries are their biggest concern. Being able to travel safely, being vaccinated, low infection rates in the countries they want to visit and the availability of travel insurance that insures against COVID-19 are likely to have an impact on travel decisions.

You should use this 'downtime' to prepare your travel product for a European market that is keen to travel, but will need reassurance that there are excellent safety protocols and cleanliness measures in place to keep visitors safe. You must also establish new booking terms and conditions and clearly state what cancellation and waivers you will offer to your buyers during the pandemic.

Consult the CBI study [How to respond to COVID-19 in the tourism sector](#) for tips on preparing for the future recovery of the tourism sector. The study includes detailed information about revising terms and conditions to help you amend yours.

Viator, the world's largest online travel agency (OTA) for trips, tours and experiences, has gathered a number of useful resources for tour and activity operators, [COVID-19: Resources and How to Navigate Your Business Through a Crisis](#).

The World Travel & Tourism Council (WTTC) has launched a new set of measures to rebuild consumer confidence, reduce risk and encourage the resumption of travel. The measures were developed in partnership with others, including the Adventure Travel Trade Association (ATTA). Some of the measures include:

- reducing the number of participants to allow for social distancing;
- ensuring activity difficulty levels are easy for participants to meet so as to reduce the need for rescue services;
- providing clear, consistent and up-to-date communication on health and hygiene protocols;
- providing clear information in advance and on arrival about protocols such as the wearing of face masks, hand hygiene guidance and social distancing requirements;
- encouraging online sales wherever possible;
- encouraging travellers to handle their own luggage for the duration of the trip;
- limiting queuing and physical contact wherever possible.

You can download WTTC’s [Tour Operators - Global Protocols for the New Normal](#) for more details about the measures and decide whether to apply for the ‘[Safe Travels](#)’ stamp.

Together with some major international tour operators, ATTA has also published a range of insights and frameworks to help local tour operators reopen niche adventure tourism markets safely, including [Trekking amid COVID-19: Recommendations](#). Download the guide to see what you can adopt for your business.

For the remainder of this report, all discussion, insight and advice has been provided on the basis of travel in normal circumstances.

What are the requirements for niche markets?

Developing a walking tourism product

Walking tourism is a very common global tourism activity. It appeals to European tourists who enjoy walking outside in nature and who are also interested in authentic local experiences. Walking is a way to connect with the local landscape, nature and wildlife and to enjoy the sense of a place, as a solitary pursuit or walking in a group, and meeting local people on the way. Additional cultural experiences, such as staying overnight with a local family, are often included in longer walking tourism trips.

Walking trips are inclusive and appeal to a wide range of people of different ages and abilities, from extremely physically challenging on mixed terrain to a gentle stroll on easy terrain. Walking tours are also popular in cities and towns, for the purpose of experiencing the culture of the place. *The focus of this report is walking tourism in predominantly rural locations and taking place mostly on unpaved roads.*

Specialist niches within walking tourism are identified as Nordic walking, long-distance walking, hiking and trekking. Although similar and often referred to interchangeably, there are some differences between hiking and trekking, which are outlined in the table below.

For more information on niche tourism markets, take a look at CBI’s interactive infographic [Which tourism market segments and niches should you target?](#)

Table 1: Walking tourism – Difference between hiking and trekking

Hiking	Trekking
Motivation: done for fun or pleasure, to reconnect with nature, relieve stress, keep active	Motivation: also for fun/pleasure but with a particular destination in mind, such as a place of pilgrimage or mountain range

Involves long walks, especially in the countryside	Involves longer, more challenging journeys on foot
Can be day hikes or multi-day hikes that either return to the same point every night or follow a circuitous route	Usually multi-day, starting at one point and finishing at another point
Hikes are not too physically demanding	Treks tend to be adventurous and physically demanding
Hiking is often on marked or unmarked trails, in accessible locations such as open countryside, hills, valleys, mountains, rivers and lakes, coastal walks, forest and woodland regions	Trekking is usually done in more remote or difficult-to-access locations such as jungles or mountains
If a hike involves an overnight stay, accommodation could be a small hotel/hostel, home stay, camping or hiker hut on the way	Treks usually involve an overnight stay and camping (wild camping) is the norm
No specialist equipment required other than sturdy boots, maps, walking poles (if wanted or recommended), provisions for the required length of time	Depending on location, specialist equipment may be required, such as crampons, climbing gear, tent, survival gear (if needed)
Hikes usually last for at least four to five hours, but can be less or more, depending upon terrain	Treks can often last for around six or seven hours a day, for a few days in a row; again, this can be less or more, depending upon terrain

Source: Acorn Tourism Consulting

The essential requirement for a walking tourism product is anywhere that has a route with characteristics that are distinctive for the area. This can be any terrain that is suitable for walking, such as flat or hilly countryside, coastal regions, hills and valleys, mountains, rivers, forests and woodlands, and deserts. Walking tourism experiences can be guided or self-guided, on marked or unmarked trails/paths. They can last from a few hours to a few days, a week or more. The following are common walking tourism products:

- Easy/introductory walking trip
- Moderate walking trip
- Walking trip combined with another activity, such as kayaking or culinary activities
- Self-guided walking trip
- Walking safari with expert guides
- Centre-based walking trip, staying in one place and setting out daily
- Challenging walking trip

- Wilderness walking trip
- Winter walking/snowshoeing trip
- Cross-country skiing trip
- Walking pilgrimage, often for long distances
- Challenging trek
- High-altitude trek

Some of the most highly regarded walks are found in developing destinations and there are multiple opportunities all over the world for local tour operators to develop walking tourism packages. Some highly regarded walking, hiking and trekking routes are identified below, but this is not an exhaustive list.

Table 2: Best walks, hikes and treks in Africa, Asia and Latin America

Walks	Country	Length, duration, difficulty level
<i>Africa</i>		
Tsitsikamma Trail	South Africa	60 kilometres, 6 days, moderate
Mount Kilimanjaro	Tanzania	45 kilometres, 6–9 days, tough
The Toubkal Circuit, Atlas Mountains	Morocco	72 kilometres, 4–6 days, moderate
Simien Mountains Traverse	Ethiopia	Varies, 6–9 days, moderate to tough
<i>Asia</i>		
Great Himalaya Trail	Nepal	1,700 kilometres, 150 days, challenging
The Great Wall	China	5,000 kilometres (total), 1–12 days per section, easy to moderate
Chomolhari Trek	Bhutan	133 kilometres, 10–13 days, tough
Mount Kailash Circuit	Tibet	52 kilometres, 3–5 days, moderate to tough
Singalila Ridge	India	85 kilometres, 6–7 days, moderate
Annapurna Circuit	Nepal	300 kilometres, 17–24 days, moderate to tough
<i>Latin America</i>		

Inca Trail	Peru	45 kilometres, 4 days, moderate to tough
El Circuito	Chile	130 kilometres, 7–10 days, moderate to tough
Inca Trail to Ingapirca	Ecuador	40 kilometres, 3 days, moderate
Pati Valley	Brazil	15 kilometres, 1 day, easy
Waitukubuli National Trail	Dominica	184 kilometres, 9–14 days, moderate
Nebaj to Todos Santos	Guatemala	55 kilometres, 4 days, moderate
The Silver Trail	Mexico	160 kilometres, 9 days, moderate to tough

Source: Wanderlust, [37 of the world's best walks](#)

As a sustainable, low-consumption tourism activity, walking travel products are relatively easy to establish in many places and there are many benefits for a destination and local communities, along with regional and national economies:

- They are relatively easy to implement
- They require only modest investment and are typically subject to lower maintenance costs
- They do not require any specific buildings or other infrastructure development
- They have a high market potential
- They can complement other tourism products and/or be combined with other tourism products
- They present an opportunity to encourage tourism in lesser-visited areas
- If developed and managed properly, they are a sustainable, low-consumption form of tourism
- There is a high potential to create local economic benefits through community involvement
- They can be a year-round travel product
- Walking tourism can encourage longer stays
- They can appeal to walkers in the low/off-peak season

Elements of walking tourism

Walking tourism is a very broad niche and there are many possible products that could be developed, depending upon the geography of your destination. There are several factors to consider when planning your walking travel product. You should consider each of the following elements:

- Establish the characteristics of the route, whether it is challenging, easy or moderately difficult. Many routes may be a combination of difficulty levels. These factors will impact on who you target with your walking tourism product.
- If there is a marked trail, ensure the signage is in a good state of repair.
- Find out how the route is maintained and by whom. If renovations are needed, contact the relevant government department and the tourist board to see how it can be repaired.
- Check what accommodation options there are on the route. These could be campsites, home stays, hostels, small hotels, B&Bs or guest houses, or boutique/luxury hotels.

- Establish whether there are other amenities on the route, such as benches and/or toilets.
- Check what other economic opportunities there are on the route, such as bars or restaurants, shops, cultural opportunities, or stop-offs to visit local villages/communities.
- It is important to involve local communities in developing and maintaining walking tourism products. If they benefit directly from visitors to their community, they will be more likely to support tourism initiatives.
- For guided routes, recruit experienced walking guides who know the route, can speak the language of the visitors well and can bring the area to life. Guides should also be trained in first aid.
- For self-guided walking tourism packages, suitable maps and/or road books must be provided for walkers. Maps should be detailed, include any attractions on the route and signpost where there are amenities for walkers, such as accommodation.
- Consider whether your business can provide a full-service experience to self-guided walkers that includes transporting luggage from accommodation to accommodation en route, and/or catering meals on each walking day.
- Think about ways of incorporating other tourism products into your experience. Food experiences, wildlife and nature, photography courses and wine tastings are often paired with walking tourism products.

European walkers are keen to know how easy or difficult a walking trip will be and you should be able to advise them. Consider creating a grading system for your walking tours. The example below, which you could adapt for your walking tourism product, is from a UK tour operator. You may want to consider adding more detail, like distance/time to walk each day, and type of accommodation en route, such as camping, mountain cabins, hotels or B&Bs.

Figure 1: Walk grading chart



Source: On Foot Holidays

Ensuring safety for walkers

Keeping walkers safe while under your care is paramount and you should be very clear about all safety and security measures you have in place. Many destinations, national parks, trails and other walking destinations issue guidelines, checklists and/or posters that give good advice to walkers.

See the two examples below and browse a wider range of posters and checklists at [Buy Rope](#).

Figure 2: Tips on hiking safely



Source: Buy Rope

Create your own safety guidelines for walkers that are appropriate for your destination. They should be suitable for both guided and self-guided walks. Use the following checklist to help you.

- Do not hike alone; if you must, make sure you tell someone where you are going
- Be prepared for emergencies, such as torrential rain, heat stroke, sunburn, injuries/accidents, insect/snake bites (as appropriate)
- Carry a first aid kit with the necessary means to treat possible ailments, such as blisters
- Dress appropriately

- Stay on the trail to keep yourself safe and protect the biodiversity/nature/wildlife
- Do not trespass on private property
- 'Leave no trace' – take all your litter with you
- Respect the wildlife – do not feed or harm the wildlife
- Do not pick any plants/leaves or collect any mementos such as pebbles or shells
- Respect local communities – ask for permission if you wish to take photos

While the COVID-19 pandemic continues to affect most countries across the world, local tour operators providing outdoor experiences are set to resume business more quickly, as it is widely known that the coronavirus is more difficult to transmit outdoors. While this is good news for walking tourism operators, there is still a need to issue guidelines to inform walkers and the communities they meet on how they can keep themselves safe.

Some trails have created guides to help walkers stay safe. The [Jordan Trail](#) has included the guidelines produced by the [World Trails Network, COVID-19 and Trails](#). The [Lebanon Trail](#) has published a useful guide to [Hiking and Organising Hikes Responsibly During the COVID-19 Pandemic](#), which you can download for tips.

You should also consider establishing a Countryside Code to tell walkers how they should behave. A code should include guidelines on whether camping is allowed, campfires, litter, wildlife and nature and anything specific to the countryside in your destination. This simple example is from the Falkland Islands.

Figure 3: Example of a Countryside Code



Source: Falkland Islands Government

Quality service standards and sustainability

The International Organisation for Standardisation (ISO) has established a number of standards for the tourism sector to help tour operators to plan and deliver tourism activities to a high standard. The ISO is developing a new standard to cover [service requirements for hiking and trekking activities](#). You should keep checking when the standard will be published and decide whether it would be of benefit to your business to purchase the standard.

Tips:

Compile a list of all the possible places in your region where walking tourism has either been established or could be developed.

Establish what facilities are either in place or under development, so you can assess suitability for the market.

Contact the local tourist board to discuss your plans. If you develop a good relationship with it, it is more likely to support you when you launch your product.

In rural areas where you will be crossing land owned by local communities, make sure you have permission from the relevant mayor or chief to walk or camp on their land, if necessary.

2. Through what channels can you get walking tourism products on the European market?

How is the end market segmented?

Walking tourists from Europe share many characteristics with ecotourists/nature tourists, adventure tourists and cultural tourists. This means they are interested in nature, wildlife, and sustainable and responsible tourism, and have a strong desire for an authentic and immersive experience when they travel.

Throughout Europe, walking and hiking is one of the most popular outdoor activities and attracts participants of all ages. The Ramblers Association, a charity based in the UK, has reported an increased number of walking groups of people in their 20s and 30s, driven by social media platforms such as Instagram, the most popular social media platform for inspirational travel images. In Germany, demand for hiking among the general population increased by 13% between 2010 and 2014.

Millennials (born between 1980 and 1995, aged between 26 and 41 in 2021) are a keen hiking group. Research in 2018 found that [81% of UK-based Millennials would consider taking up hiking as a hobby](#). As a consumer group keen on authentic and unique travel experiences, Millennials are a good target group for walking experiences while on holiday.

Holidays specifically for the purpose of walking are also increasing in popularity: a survey in 2018 by the Association of Independent Tour Operators (AITO) found that 54% of respondents were interested in a walking holiday. Walking holidays are also a very convenient option for European walkers, as they require almost no special equipment apart from suitable footwear, backpacks and – depending upon the destination – suitable outdoor clothing.

Motivations for walking and hiking are changing as younger people take part. Enjoying and experiencing nature, staying active and finding out more about a region, and reducing the stress of work and everyday life are new reasons for taking a long walk or hike. Socialising and taking time to reflect are also new reasons for taking part.

Walkers can be segmented by type and motivation, as is shown in the chart below.

- Seekers take part in hiking activities as part of a broader leisure motivation. They are more likely to be walking with other like-minded people, for social reasons and to get away from it all. They are more likely to choose a marked trail with activities and amenities on the way.
- Enthusiasts like to take part in hiking activities to be healthy, for both the body and the mind. They are more likely to choose a destination based on beauty and remoteness to relieve stress and reconnect with nature. They are likely to plan their walking trips in advance and are more inclined to take longer trips.

Figure 4: Types and motivations of walkers



Source: Franziska Thiele, Ostfalia University of Applied Sciences

Through what channels do walking tourism products end up on the end market?

The major channels for walking tourism products are Fully Independent Travellers (FITs) and tour operators, which are either European tour operators or online travel agents (OTAs). The chart below shows the process by which walking tourism products are researched and sold.

Figure 5: Sales process of walking tourism products



Source: Acorn Tourism Consulting

- FITs make their own bookings and use a variety of methods that include both direct sales (online, directly with experience providers and local operators) and indirect sales (European tour operators and online tour operators [OTAs]). They may also make direct bookings with OTAs and trail or park organisations for specific parts of their holiday.
- European tour operators are a mix of specialist operators, adventure operators and general operators. They are a large, competitive group of operators that sell their holidays to a worldwide market.
- Examples of specialist operators include UK-based [World Walks](#), [Walks Worldwide](#) and [Ramblers Holidays](#), French operators [La Balaguère](#), [Terres d'Aventure](#), [Allibert Trekking](#) and [Tamera](#), and German operators [Hauser Exkursionen](#) and [Bergauf](#).
- Adventure and general operators also sell walking holidays, including UK-based [KE Adventure Travel](#) and [Exodus Travels](#), German operator [Trails Nature and Adventure Trips](#) and Dutch operator [Better Places](#).
- OTAs are a dynamic and growing network of sellers of holidays, trips and experiences online. There are two main categories of OTAs that sell holidays and tourism experiences. The first type are OTAs that promote and sell holidays on behalf of other outbound tour operators, which are often market leaders like [Intrepid Travel](#). The other type of OTA sells trips, experiences and holidays on behalf of local operators and experience providers that range from larger organisations to small communities and individuals. [Viator](#) is the best-known example in this category.

Table 3: Examples of OTAs on the market

OTA	Useful information
Tourradar , Travelstride	These global OTAs sell holidays from many well-known tour operators from all over the world. They both offer a wide range of hiking, walking and trekking trips in all the leading walking destinations.
Responsible Travel	Promotes responsible and sustainable holidays that are provided by tour operators and local, independent operators and communities. Walking holidays are a category of trips.
Evaneos	Has a large presence on the European market and customises trips for travellers with local operators at destinations. Works in 160 destinations with 2,000 local operators.
Clean Travel	Offers ethical and sustainable adventures that directly benefit local communities. Partners that wish to join must comply with a range of requirements that are based around sustainability.
Much Better Adventures	Works with a range of independent local guides and hosts to provide adventures and experiences worldwide.

Tours By Locals	A community of almost 5,000 tour guides working in 190 countries around the world, providing authentic cultural experiences including walking tours.
Viator (owned by Tripadvisor)	The world's largest OTA selling experiences, trips and tours. Hiking trips are one experience within the Outdoor Activities category.

Source: Acorn Tourism Consulting

Tips:

For more information about the FIT market, see the CBI study [What are the opportunities in the European FIT tourism market?](#)

Look at this [overview of OTAs](#) and research any that might fit your business profile.

What is the most interesting channel for you?

All sales channels are worth considering as good points of entry to the European market.

If you have a website, FITs and European tour operators will be able to find your business. Download the CBI study [How to be a successful tourism company online](#) for tips to help you set up or improve your website.

To help you get started working with an OTA, travel software company Trekkssoft has produced a number of useful guides, including [How to work with OTAs – A guide for tour and activity companies](#). You will need to sign up online – this is free of charge.

Check out how to join each of the specialist OTAs using the following links:

- [How to Join Responsible Travel and Market Your Tours](#)
- [Join the Clean Travel Community](#)
- [Much Better Adventures – Apply to Host](#)
- [Become a ToursByLocals Tour Guide](#)
- [Viator – Supplier Sign Up](#)

Tip:

For more information on the European tour operator market, these two CBI studies will help you: [10 tips for finding buyers on the European tourism market](#) and [10 tips for doing business with European tourism buyers](#).

3. What competition will you face in the walking tourism market?

Which countries are you competing with?

Walking tourism is present in many countries. There is no shortage of destinations that European walkers can choose for a hiking experience. Some countries have well-established walking tourism industries. The following countries and regions are profiled:

- Bhutan
- Morocco
- Nepal
- Patagonia (Chile and Argentina)
- Peru
- South Africa

However, many other destinations also have excellent walking tourism opportunities and should also be considered as competing destinations. These include Ethiopia, Kenya, Madagascar, Mauritania, Tanzania (Africa); China (The Great Wall), Indonesia, Jordan, Mongolia, Kyrgyzstan, Sri Lanka (Middle East/Asia); Costa Rica, Nicaragua (Central/South America). For more information about good walks around the world, consult [Walkopedia](#), a comprehensive directory of the world's best walks.

Bhutan

Walking in Bhutan is one of the best ways to experience the unique culture of the Himalayan kingdom. The country features isolated mountainous regions, remote monasteries and villages that are only accessible by foot. Treading in the footsteps of ancient pilgrims and visiting rural communities as they go about their daily lives are highlights of walking in Bhutan.

There are a range of walking routes in the country and several can be accessed from one of the larger cities, such as the Druk Path trek from Paro, and Daga La Thousand Lakes from Gyangtse village. Day hikes can be taken in the Bumthang Valley, accessible from Jakar, and in the east other treks are close to the border with India. Routes vary in difficulty from easy to challenging, which provides good options for walkers of all levels.

Morocco

Morocco has long been a popular choice for European walkers. The country is easily accessed from the European continent, and the market for walking trips in the Atlas Mountains is well established. Marrakech is the main access point for walking and hiking in the Atlas Mountains. Mount Toubkal in the High Atlas is a popular two-day trek for hardcore hikers and climbers, while leisure walkers enjoy the gentler gradients of the lower Atlas range (Anti-Atlas).

The Berber people, the indigenous people of Morocco, live mostly in the Atlas and Rif Mountains and their friendliness to walkers and visitors is well-known. Subsistence farming is their way of life. They know the mountains well and are often walking guides. Home stays with local families are common for multi-day walking experiences. Mules are widely used to carry provisions/equipment on hikes and treks, usually led by local mule drivers.

Nepal

Nepal is home to the Himalayas, the world's highest mountain range, and is a well-known destination for treks and hikes. The Annapurna Circuit is a horseshoe-shaped, 210-kilometre route that traverses numerous traditional villages. An 18-day trek and a shorter 11-day option are popular choices for walkers. Langtang is an alpine trek that lies parallel with Tibet. The Manaslu Circuit is an ancient salt trading road in an isolated location with spectacular views.

Many of Nepal's best trekking regions are in national conservation areas and walkers and trekkers require permits to visit. This includes the Everest, Langtang and Annapurna areas. The system of trekking permits helps to raise funds to protect the region and provides additional tourism income. However, there is some controversy around how much of the funds raised reaches the local communities that service tourism in the mountainous region.

Patagonia (Chile and Argentina)

The region of Patagonia, which extends across both Chile and Argentina, is popular with walkers, hikers and trekkers who are drawn by the diverse terrain and spectacular views of the Andes mountains, glaciers, lakes and rivers. The Torres del Paine National Park in Chile is dominated by three jagged peaks and there are several multi-day walking routes comprised of three trails that criss-cross one another. The W trek is the most well-known hiking route, with a well-established trail system.

El Chalten is Argentina's hiking capital and there are two popular day hikes, Laguna de los Tres and Laguna Torre. The shores of the lake offer spectacular views of the Grande Glacier.

The Atacama Desert in Chile, although not strictly in Patagonia, offers a wide variety of walks, lasting from three hours to three days, to visit attractions such as flamingos feeding at the salt lakes, the El Tatio Geysers and the Inca ruins outside San Pedro.

Peru

Peru is an excellent destination for walking and hiking, and for walkers of differing abilities. Walking/hiking tourism is well established and there are numerous guides and local operators who are well trained for the inbound market. Permits to hike the Inca Trail are required. The route is busy and many tourists opt to take alternative routes to the UNESCO World Heritage Site of Machu Picchu.

Cuzco in the Sacred Valley is the starting point for most walking trails to Machu Picchu and there are several day hikes. The Inca Trail through the cloud forest takes around five days to complete and is very popular. Another equally interesting trek is the Lares and Royal Inca Trail, following an ancient Inca path through the Andean forest and the Huchayccasa Pass. The Colca Canyon around Arequipa and the Cordillera Blanca are other excellent walking regions.

South Africa

South Africa's incredible diversity of landscapes and the presence of iconic wildlife make it an exciting destination for walkers. There are varied options, including mountain hiking trails in the Drakensburg Mountains, coastal trails in the east and south in the Tsitsikamma National Park, the Otter Trail and the Wild Coast. Historic battlefield trails such as the Fugitives' Trail are also interesting options. Table Mountain and the Cape Peninsula are other popular walking destinations.

Walking safaris are possible in some national parks and game reserves, such as Kruger National Park and Hluhluwe-Imfolozi. South Africa is a key destination for 'soft adventure' tourists from Europe, particularly Germany, the UK, France and the Netherlands.

Which companies are you competing with?

Europe has been hit very hard by COVID-19 and has been one of the worst affected regions in the world. You must work hard to reassure European travellers that you have robust cleanliness protocols in place to keep them safe. It is essential that you are very clear about the measures you have introduced and specify what they are on the homepage of your website or provide a prominent link to a special COVID-19 page.

European tour operators feature detailed and clear information about how they will keep their customers safe and what financial protection they offer once their holiday is booked. In many cases, it is the first thing that

visitors see when they click through to the homepage, like this example from Ramblers Walking Holidays.

Figure 6: COVID-19 assurances and guarantees for customers



Source: Ramblers Walking Holidays

Bhutan

[Blue Poppy Tours & Treks](#) specialises in tailor-made trips to Bhutan and is based in the capital city Thimphu. Its name derives from the blue poppy, Bhutan's national flower. The operator is run by a local expert trekker and its website is detailed and informative about the services it offers. Trek itineraries are described by number of days it takes to complete, difficulty rating and the best season to walk. All treks are priced according to a government tariff based on a daily rate levied on each night spent in Bhutan, plus an additional tourist tax per couple/per person. Accommodation is a range of standard or luxury hotels along with home stays in a traditional Bhutanese farmhouse.

[Bhutan Travel Guru](#) works with service providers all over the country to offer travel experiences that include walking, hiking and trekking. Tours are customised and operated under responsible principles. There is plenty of information to inform the visitor about Bhutanese customs and traditions along with practical information such as the best time to travel and how to travel. Trips are grouped by theme and hiking and walking tours involve hiking through forests, remote villages, mountains, farmlands and valleys with overnight stays in comfortable hotels. Blog posts include a travel advisory about the COVID-19 pandemic.

Nepal

[Social Tours](#) aims to support social development through tourism. All tourism products are operated under responsible principles and it plays a leading role in the Sustainable Tourism Network in Nepal. Its business model is based on the values of respect for every individual, honesty and integrity, excellence in delivery, social responsibility and environmental conservation. Local people are involved in the provision of tourism at all levels. Social Tours also sells its trips through several OTAs, including Viator/Tripadvisor, Tourradar, Tourconnect and Kimkim. The operator encourages planning and booking in advance of the resumption of tourism following COVID-19.

[Trekking Team Group](#) offers multi-day and day walking, hiking and trekking trips as well as other cultural and adventure trips. The operator is [Travelife](#) certified and operates responsibly, using local guides, organising stays with local families or in locally-owned accommodation and serving local food. Its homepage has links to several social media platforms and clearly indicates ways to get in contact, which is very helpful to the consumer.

Awarded the Tripadvisor Travellers' Choice Award in 2020, it also features testimonials and a good list of reasons to travel with the operator. If you have your own website, you could think about including something similar.

Figure 7: Reasons to travel with Trekking Team Group



Source: Trekking Team Group

Booking and cancellation policies during COVID-19 are included in the Essential Information section.

Morocco

Based in Imlil, Morocco's 'trekking capital', [Aztat Treks](#) is an independent Berber operator that organises private day or multi-day trekking and hiking trips for visitors of all abilities. All trips are guided by licensed, English-speaking locals and accommodation is in a mix of modern igloo tents, Berber houses or mountain refuges. The website is available in several European languages, including English, German and Dutch, and features customer testimonials on a scroll bar on the homepage. The operator has also included testimonials from the international press. By including these, potential customers are reassured as to quality of the tour and the operator.

[Atlas Vertical Travel](#) offers eco adventure tours all over Morocco, including in the Atlas Mountains and the Sahara Desert. Many trips are personalised around the needs and abilities of the group. The operator is family-owned and operated, and all staff are local Berbers. There is a section covering health and safety on the website and the operator is committed to high standards, understanding the need for this from European customers. In addition, the operator guarantees the safety of vehicles used and that drivers are well-qualified. Although the website is simple, there is enough information to generate interest.

Patagonia (Chile and Argentina)

[Chile Nativo](#) offers active travel trips in Patagonia, including guided and self-guided options for the W Trek, Torres del Paine's most famous hike. An 'Off the W Trek' option follows lesser used trails. As a local specialist in Patagonia, the operator's focus is on the pristine wilderness of the region. It works with and supports local communities and businesses and is working towards becoming a carbon-neutral company. The standards adhered to are published on the website.

Safety protocols around travel during COVID-19 is prominently positioned and fully detailed. The operator has signed up to WTTC's Safe Travels and Chile's national COVID-19 safety standards.

Argentinian operator [Say Hueque](#) promotes a range of tours in Chile, Argentina and hiking in Patagonia. The operator has strong sustainability credentials with core values around protecting nature, immersive experiences and supporting local economies responsibly. Its 'book with confidence' guarantee offers customers no-risk cancellation and flexible travel in the COVID-19 age. This clear infographic is very reassuring for potential travellers.

Figure 8: Book with confidence



Source: Say Hueque

Peru

'100% Peruvian Company' [Alpaca Expeditions](#) offers a wide range of multi-day and full days treks, including the Inca Trail. At the top of its website is a safety notice for both travellers and staff and a direct link to traveller information for its 2021 and 2022 trips. This provides very important information at the first point of access to the website. The site is translated into both English and Spanish and the footer features all the important information, such as contact details, payment options and social media platforms.

The company provides a lot of useful information about Peru, its culture and walking trails, and how the operator has a strong focus on its commitment to sustainable tourism and support of community projects. It supports porter training programmes and projects to empower women. The operator has won numerous awards, which are all posted prominently along with the major publications and platforms it has been featured on.

[Llama Path](#) is a sustainable tour operator that offers a wide range of trails, treks and day tours throughout Peru.

It supports a range of community projects, including its 'red army' of porters, the Llama Path Foundation and Llama Path in Sports. European tourists increasingly like to know they are making a positive contribution to local communities and projects when they travel, so all this information contributes to their travel decisions.

South Africa

Walking safaris are possible in several game reserves and national parks in South Africa and many safari companies offer them, including [Safari With Us](#) and [Mzansi Experience](#). Walking safaris are highly dependent on expert wildlife guides who know the terrain and resident wildlife well. They will usually be qualified to the standard of the [Field Guides Association of South Africa \(FGASA\)](#).

The [Wellington Wine Walk](#) is a series of hikes through the Wellington Valley in the winelands of the Western Cape, accompanied by accredited local guides who inform walkers about the culture and history of the area. Stops on the route are at wineries, olive oil producers and other local producers. Walkers' luggage is transported to accommodation stops during the day. Also offered are several day walks that encompass wine, food and heritage.

[Hike Table Mountain](#) provides guided walking trips to Cape Town's iconic Table Mountain. The operator was founded by a group of experienced guides. Their unique selling point (USP) is clear in the specialisation of Table Mountain only and its [Why Hike With Us](#) section offers excellent reasons. There are several routes up the mountain and routes can be mixed and matched to provide a unique experience according to difficulty, terrain and different views. Each route is graded A, B or C, where an A route is walking only, B involves some scrambling and C is more demanding and might involve rope work.

Tips:

Undertake your own research into the market in your destination to see who your competitors are and what walking travel products they are offering.

Make sure you are clear about what types of walking trips are the most popular and whether they can be combined with cultural or other tourism experiences.

Which products are you competing with?

Walking, hiking and trekking have much in common with adventure tourism, cultural tourism and nature/ecotourism, so these products are your main competitors. Offering combinations where appropriate will help your walking travel products to stand out.

For all these niches, sustainable and responsible tourism practices are essential.

Tips:

For more information about these specialist niches, consult the following CBI studies: [What are the opportunities in the European adventure tourism market](#), [What are the opportunities in the European cultural tourism market](#), and [What are the opportunities in the European nature and ecotourism market](#).

To see how niche tourism markets and segments cross over with one another, have a look at CBI's interactive infographic [Which European tourism market segments and niches should you target?](#)

4. What are the prices for walking tourism products on the European market?

There is a huge variety of prices in the walking tourism segment. Costs to travellers are usually made up of several different elements, such as guides, park fees, food, accommodation, transportation if required and contributions to local projects and/or communities. Prices are often more expensive the fewer the guests in the group and your pricing structure should make clear if this is the case. The table below gives an indication of the variety of prices on the market today. Prices for holidays exclude international airfares; research was conducted in June 2021.

Table 4: Prices of walking tourism products in competing destinations, 2021

Walking trip	Country	Duration	Minimum price pp (€)
<i>Short trips and experiences</i>			
Easy hiking from Lakeside Pokhara to Rock Hill	Nepal	4 hours	58
Half-day walk in the Atlas Mountains	Morocco	4 hours	60
Skeleton Gorge to Table Mountain Summit	South Africa	4 hours	82
Twelve Apostles to Table Mountain Summit	South Africa	4+ hours	76
Hike through the Forest of Hemlock & Rhododendrons	Bhutan	5 hours	52
Hike with a local	Nepal	5 hours	69
Day trip to explore the Atlas Mountains	Morocco	6 hours	41
Day walking trip to the Atlas Mountains	Morocco	8.5 hours	70
Tierra del Fuego National Park hike and canoe tour	Patagonia	8 hours	104
Humantay Lake/Blue Lagoon day hike	Peru	Full day	124

Rainbow Mountain hike	Peru	Full day	132
<i>Longer trips and holidays</i>			
Overnight trek in Berber villages	Morocco	2 days	232
Family trek Atlas Mountains and Berber Villages	Morocco	3 days	348
Hiking tour of Drakensberg Mountains	South Africa	3 days	485
Three-day Three Valley hike	Morocco	3 days	215
Kruger National Park walking safari	South Africa	3 days	685
Inca Trail trek to Machu Picchu	Peru	4 days	568
Lares trek	Peru	4 days	572
Hike the Lower Foothills from Pokhara to Poon Hill	Nepal	5 days	276
Rhino walking safari	South Africa	6 days	1,930
Cultural discovery through day hikes	Bhutan	7 days	1,145
Trekking to explore the Anti-Atlas	Morocco	8 days	697
Remote villages walking tour	Bhutan	8 days	1,330
Home stay trekking holiday	Nepal	13 days	947
Hiking in Patagonia	Patagonia	16 days	2,292
Argentine & Chilean Patagonia	Patagonia	18 days	2,752

Source: Acorn Tourism Consulting

Tips:

Conduct your own research to find out typical prices for similar walking tourism products at your destination. Be sure to compare 'like for like' so you can assess whether your product offers value for money.

Consult the CBI study [10 tips for doing business with European buyers](#) and scroll to tip 7, Set a fair price for your product.

For more advice about setting prices, download the guide [Pricing your tourism product](#) published by Destination New South Wales.

This study was carried out on behalf of CBI by [Acorn Tourism Consulting Limited](#).

Please review our [market information disclaimer](#).