October, 2010

THE wildlife TRUSTS
YORKSHIRE

LEADER

Responsible Tourism

Final report to the **Yorkshire Wildlife Trust**

ICRT, Leeds

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1 Introduction

1.1 Purpose of this report

This report has been prepared by the International Centre for Responsible Tourism (ICRT) at Leeds Metropolitan University on behalf of the Yorkshire Wildlife Trust (YWT). Funding for the work has been secured from the LEADER programme[1] for the East Riding of Yorkshire and North Yorkshire, and focuses mainly on an area we are referring to as the Coast, Wolds, Wetlands and Waterways Nature Tourism Triangle. This triangle is bounded by the River Hull valley to the west, the North Sea to the east and follows the Humber estuary to the south.

The purpose of the report is to provide an overview of the nature and wildlife tourism product in eastern Yorkshire and to identify the demand for, and impacts of, related tourism in the study area. This baseline review is then used to confirm gaps in provision and to support an assessment of the additional contribution that could be made to the local economy by additional investment in product development and marketing. The report concludes with some recommendations for developing and promoting the area's wildlife tourism product.

Both the YWT and their partners in wildlife conservation, the RSPB and Yorkshire Water, have ambitious plans for some of their sites across eastern Yorkshire, responding to the opportunities present within this important and growing sector. The area's destination marketing organisation, Visit Hull & East Yorkshire (VHEY) is also a partner with a vested interest in developing the area's nature and wildlife tourism sector. The findings of this research will be used in the short term to support funding and other applications associated with the proposed YWT developments at Spurn Point, Flamborough (South Landing) and North Cave, more details of which are presented later in this report. It also provides supporting evidence for YWT's longer term development aspirations at locations including Paull Holme Strays, Cowden, Danes Dyke and Flixton and Cayton Carrs.

1.2 Document structure

This report is structured as follows:

- Section 2 contains an overview of some of the key features of nature and wildlife tourism, based on a literature review and short programme of site visits to other wildlife tourism destinations in Northern Europe. The purpose of this section is to identify what constitutes 'best practice' in managing and promoting nature and wildlife tourism

[1] Information about the Coast, Wolds, Wetlands & Waterways LEADER programme and how to apply can be found at www.ruralprogrammeseastyorkshire.co.uk/rdpe. The LEADER programme is being financed by the European Agriculture Fund for Rural Development as well as Defra and is being overseen by Yorkshire Forward as part of the Rural Development Programme for England.

- Section 3 presents an overview of the current nature/wildlife tourism product in eastern Yorkshire, referring where appropriate to those factors identified as being of crucial importance to a vibrant wildlife tourism sector as reported in Section 2. This section also includes the findings of a pilot survey of more than 80 visitors to three YWT reserves implemented during May and June 2010 to assist with the identification of current patterns of activity at YWT sites

- Section 4 presents an assessment of current levels of public engagement with these assets, based on a combination of primary and secondary data

- An initial assessment of the economic impact of nature/wildlife tourism to the area's economy is presented in Section 5

- Section 6 describes some of the key development proposals currently being planned by YWT and partners

- The potential impact of these developments is presented in Section 7, along with recommendations for activities and investments that can strengthen still further the impact of wildlife and nature tourism in eastern Yorkshire.

Appended are a full bibliography and case study summaries for the Parc Naturel Régional des Marais du Cotentin et du Bessin (France) and Slowinski National Park (Poland).

2 Supply side issues

2.1 What is nature tourism?

There are a number of dimensions to tourism in the natural environment. Newsome et al (2005) break natural area tourism down into three types:

- Tourism **in** the environment – e.g. adventure tourism
- Tourism **about** the environment – e.g. nature-based tourism
- Tourism **for** the environment – e.g. ecotourism

This broadly reflects a much more recent definition of natural tourism (rather than natural area tourism) proposed by the Natural Economy Northwest initiative which suggests that "*natural tourism covers a host of activities – from the quiet enjoyment of tranquil landscapes to the energy of adrenalin-fuelled sports like rock climbing and sailing*" (NENW, 2010, p11). Newsome et al (2005) define nature tourism as being concerned with the viewing of nature, where the focus is on the study and/ or observation of the abiotic (non-living) part of the environment such as the rocks and landforms as well as on the biotic (living) component of it – fauna and flora. In other words, in nature-based tourism "*the whole landscape and surrounds is the primary focus for tours and it is more holistic in its embrace of the environment"* (Newsome et al, 2005, p13).

Statistics published by the World Tourism Organisation (UNWTO) suggest that the nature tourism sector is no longer a niche market in international tourism and that nature tourism growing at up to 20% per annum (UNWTO, 2006) although the International Ecotourism Society (TIES, undated[2]) suggests a lower annual growth rate of between 10 – 12% per annum. There is a need for caution in accepting these figures, however, as overall international tourism is growing only at around 4% per annum and there remain some problems in terms of the complementarity of definitions of nature tourism used by different parts of the tourism industry. Moreover, these figures exclude domestic tourism which accounts for around 80% of all tourism trips taken in the UK, for instance.

Nonetheless, all the evidence is that this is a growing market. The market intelligence agency Mintel suggests that growth in the sector has largely been fuelled by in the increased ease of travel to remote areas, the demand for experiential tourism[3] and ever growing media exposure to wildlife through television documentaries such as those narrated by David Attenborough and produced by the BBC Wildlife Unit (Mintel, 2008). Mintel also suggests that wildlife tourism is becoming increasingly upmarket and that the product is becoming more sophisticated.

Bell et al (2007) propose a number of broad socio-economic factors that have influenced the rising demand for nature tourism and, indeed, for outdoor recreation in general:

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[2] http://www.ecotourism.org/site/c.orLQKXPCLmF/b.4835303/k.BEB9/What_is_Ecotourism__The_International_Ecotourism_Society.htm Accessed 23 July 2010

[3] See for example Smith, W.L.(2005) *Experiential Tourism around the World and at Home: Definitions and Standards* Monograph Prepared for the International Journal of Services and Standards

- Demographic changes (people live longer and are healthier for longer, increasing propensity to travel)
- The growth of the experience economy as a result of greater economic prosperity and the desire to replace goods with experiences
- Increased environmental awareness

The above are all a product of an industrial/ post-industrial society hence it is not surprising that demand for nature tourism is growing in the UK, whether this is a trip where the sole purpose is to view wildlife or whether engagement with the natural world is but one element of a more varied itinerary.

A key point to note is that within the broad 'nature tourism' sector there are a number of sub-groups, of which wildlife tourism has traditionally been the most significant. Newsome et al (2005) define wildlife tourism as:

" tourism undertaken to view and/ or encounter wildlife. It can take place in a range of settings, from captive, semi-captive, to in the wild and it encompasses a variety of interactions from passive observation to feeding and/ or touching the species viewed"

Newsome et al, 2005, pp18-19

Traditionally wildlife tourism has focussed on viewing high profile, charismatic species (see below). Yet a review of the products and services offered by UK wildlife tourism operators (Curtin & Wilkes, 2005) suggests that in recent years there has been a shift from a specialised market offering high involvement with a particular species (usually birds) to a more general market looking for an interesting and relaxing holiday based around a general interest in nature and the environment.

In such instances, the presence of a particular habitat or species may be the 'tipping point' that convinces people to visit one destination rather than another. This has resulted in tour operators generally offering a broad range of products, some of which suit the 'hard-core' expert and others that are more suited to the novice and casual enthusiast. Thus whilst wildlife tourism remains an important segment, there is also an important industry associated with promoting access to, and understanding of, the wider natural environment – in other words, nature tourism. However, segmentation of the wildlife tourism market is considered in more detail in Section 2.6 as it is felt to be the sector with the most potential for growth in East Yorkshire.

Within the context of tourism development and marketing, wildlife as a phrase is generally taken by the public to include both flora and fauna, and is mostly used to refer to animals in the wild (Mintel, 2008). There is a range of definitions of wildlife tourism used in the academic and professional literature and, at its simplest, wildlife tourism could be defined as a trip to a destination where the main purpose is to view or interact with wildlife. This can be a day visit or a trip involving one or more overnight stays. For some commentators, it can include both consumptive (i.e. hunting) and non-consumptive use, and can take place in a range of settings, from captive, semi-captive to in the wild (Newsome et al, 2005).

Some sources argue that wildlife tourism is a sub-set of 'ecotourism', defined as "*Responsible travel to natural areas that conserves the environment and improves the well-being of local people*" (TIES, 1990). This however raises problems when one considers Newsome's inclusion of viewing wildlife in captive environments (basically zoos or aquaria) as this contradicts entirely the TIES idea of travel to natural areas.

Within wildlife tourism there is a wide variety of product offers, from mainstream package tours to view the 'Big Five' (lion, elephant, rhino, leopard, buffalo) in East and South Africa to specialist bird watching trips in Central America and cruises to view cetaceans off both coasts of the USA. Consumptive wildlife tourism, which in the UK context includes stalking, game shooting and wildfowling, can also deliver considerable economic benefits (see for example Rayment, Sankey & Shedden, 1998) although this aspect is not considered here.

2.2 Interests of nature tourists

Some recent research carried out in Scotland confirms the relative importance, in that market, of the three key types of habitat to wildlife tourists. Perhaps unsurprisingly, given the access issues, terrestrial wildlife tourism is far more popular than marine tourism in terms of the overall number of trips made in Scotland, although tourists on marine-based wildlife holidays appear to have a slightly longer length of stay than other groups. One reason for this is that the costs associated with viewing marine wildlife tend to be higher than those incurred at terrestrial and coastal habitats.

TABLE 1: HABITAT PREFERENCES, WILDLIFE TOURISTS IN SCOTLAND

Habitat	Trips (%)	Nights (%)	Spend (£ million)
Terrestrial	43	41	113
Marine	21	23	63
Coastal	36	36	100
Total	100	100	277

Source: ICTHR, 2010

This breakdown by habitat type is complemented by earlier research carried out with visitors to North Norfolk's coast (Rayment et al, 2000) who found birdwatching, wildlife spotting and seal watching important activities for 60%, 33% and 19% of tourists respectively.

Research by Zografos and Allcroft (2007), looking at the environmental values of potential ecotourists (who it should be remembered are likely to be a relatively modest proportion of all potential wildlife or nature tourists in East Yorkshire), found that in almost every instance they are particularly concerned with biodiversity preservation and that ecocentric values are very high.

The implication of this is that such individuals are as interested in the broader ecology of the area they are visiting, and the moves that are being made to protect and manage it, as they are to just viewing certain species. This is an important point to consider when developing interpretation at different wildlife tourism sites around East Yorkshire. If one is targeting, amongst other segments, the very committed, specialist market, then there is a need to make sure there is interpretation of sufficiently high quality to attract and retain their interest.

2.3 Seasonality issues and wildlife tourism

There is almost always a seasonality dimension to wildlife tourism – the recent review of wildlife tourism in Scotland (ICTHR, 2010) identified a peak in activity in May and June and a second peak in July and August when tourists who are not primarily motivated by wildlife nonetheless make up a large proportion of customers for wildlife tourism operators. The same research reports perceptions amongst wildlife businesses that enthusiasts are spread more evenly throughout the year, but particularly between April and October. Obviously this reflects the presence or absence of certain species at different times of the year.

It would appear that to develop a thriving, year-round wildlife tourism industry in East Yorkshire will mean identifying niche products that can be sold to enthusiasts at times when non-specialists are less likely to want to visit the area, and then developing products and services over the later spring and summer that are sufficiently interesting to appeal to this larger but less knowledgeable market. The presence of passing migrants on the East Yorkshire coast, for instance, offers one opportunity to develop a winter-based wildlife tourism product.

2.4 Appeal of particular species

Curtin & Wilkes (2005), summarising the findings of other researchers, suggest that wildlife tourism will only succeed in a location where the target animals, marine mammals or birds have some or all of the following characteristics:

- Be predictable in activity or location
- Be readily viewable
- Be tolerant of human intrusion for at least part of the year
- Possess elements of rarity or local abundance
- Have a diurnal activity pattern

One can assume that the same principles should hold for tourism focussing on flora rather than fauna – the species being viewed must be visible, tolerant to disturbance (e.g. inadvertent trampling) and be either rare (e.g. certain orchids) or in abundance (e.g. the Farndale daffodils).

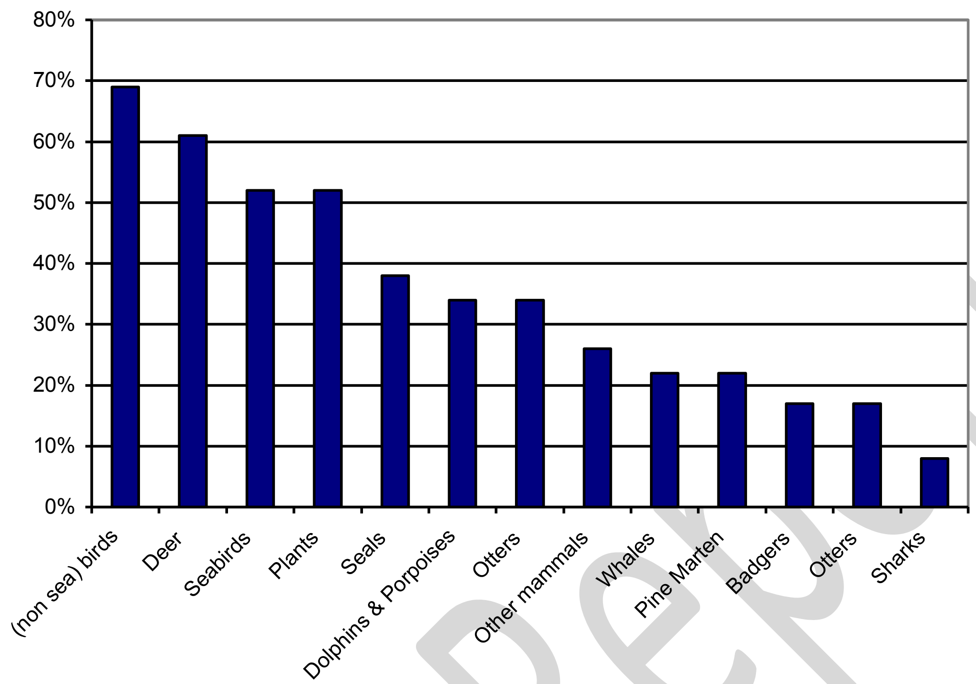
Much research has also been carried out on the appeal of different species, with charismatic species (e.g. the big five, primates, cetaceans) holding particular appeal for tourists whilst species that exhibit unappealing aesthetics and behaviour such as scavenging or perceived dangerousness are less likely to appeal to the general wildlife tourist in particular (Curtin & Wilkes, 2005). RSPB research published in 2008 suggested that 6 million people in the UK go birdwatching 'every couple of weeks'[4].

In terms of identifying high-profile species that attract tourists in the UK, there is some interesting data from the recent ICHTR study on wildlife tourism in Scotland which backs up

[4] http://www.telegraph.co.uk/earth/earthnews/3349163/Birdwatching-back-in-fashion-with-Rutland-fair.html

the importance of birds (including sea birds) as targets of wildlife viewing with charismatic species such as Deer, Seals, cetaceans and otters also being important.

FIGURE 1: POPULARITY OF DIFFERENT SPECIES AMONGST SCOTTISH WILDLIFE TOURISTS



Source: ICTHR, 2010

2.5 Profiling nature and wildlife tourists

Recent research carried out in Scotland on the economic impact of wildlife tourism across the country (ICTRH 2010) provides some useful contextual data on the profile of wildlife tourists that augments international profile information collated by Mintel (2008) and other sources. The table below summarises profile information from a number of sources and demonstrates that the wildlife/ nature tourism market tends to be made up of middle-aged and older, more well-off individuals.

TABLE 2: PROFILING NATURE AND WILDLIFE TOURISTS

Segment (source)	Age profile	Group composition	Gender
Wildlife tourists in Scotland (ICTHR, 2010)	10% under 16 3% 16-24 11% 25-34 20% 35-44 37% 45-54 19% 55-64 10% 65+	12% travel alone 59% immediate family 17% friends 12% family & friends	n/a

Segment (source)	Age profile	Group composition	Gender
Day visitors to Scottish wildlife sites (ICTHR, 2010)	14% under 16 5% 16-24 7% 25-34 14% 35-44 20% 45-54 20% 55-64 17% 65+	21% travel alone 63% immediate family 0% friends 17% family & friends	n/a
'Ecotourists' in Scotland (Zografos & Allcroft, 2007)	4% under 18 21% 18 – 34 21% 35 – 44 23% 45 – 54 21% 55 – 64 10% 65+	70% with partner or family	47% male, 53% female
Visitors to YWT reserves, East Yorkshire (ICRT, 2010)	n/a	12% on own 55% with family 14% with friends 4% with family & friends 14% with organised group[5]	n/a

2.6 Segmenting the market

There have been many attempts to segment the market for wildlife tourism based on psychographic, demographic or other criteria. An academic perspective on segmentation of the ecotourism market in particular is provided by Zografos & Allcroft (2007). They looked at segmentation based on environmental values and contrasted their findings with previous work based on behaviour, motivation, activity preferences etc.

The value of such research for product development and marketing, which is the primary interest of the Yorkshire Wildlife Trust at this point, is limited although it is useful in demonstrating that more 'casual' wildlife viewers are often more receptive to broader environmental messages looking at the interaction between man and wildlife, whereas specialists focus more on the particular species in question and its ecology.

This of course then has implications for the development of different types of tour package and when designing interpretation at heritage sites. It is also important when one considers that casual and occasional wildlife viewers are likely to be the largest single market for wildlife tourism sites across East Yorkshire, and as such catering for their needs and interests will be paramount to the development of a high value and sustainable nature tourism sector.

In its 2008 review of the wildlife tourism sector, Mintel, the noted provider of market intelligence, identified a number of key sub-sectors to watch, namely:

[5] This figure will be an overestimate of the overall pattern as it is skewed heavily by responses from one group contacted during an RSPB members' trip to North Cave

- Birdwatching (UK and US primary markets, but European market is growing)
- Whale watching
- Wildlife cruising

The first and third of these are potentially of key importance to East Yorkshire, the second less so - although cetaceans are found in the North Sea sightings cannot be guaranteed in the same way that they can at Hermanus (South Africa) and Provincetown, MA (USA).

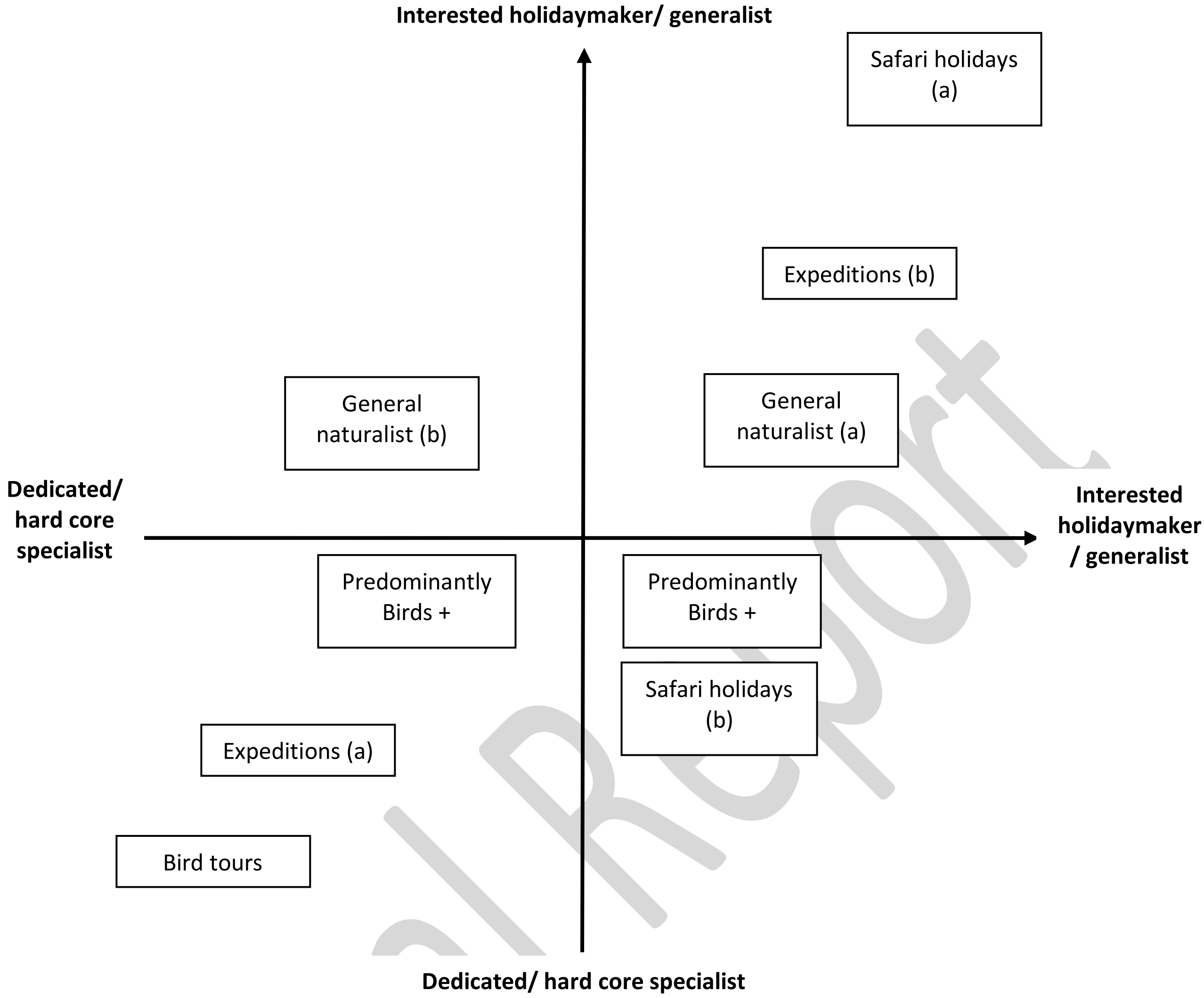
Another academic segmentation study (Curtin & Wilkes, 2005) looked at combining product and tourist perspectives, proposing the following breakdown:

- Expeditions (includes involvement in conservation, research projects and study tours)
- Dedicated bird tours (main focus bird watching and photography)
- Predominantly birds + (as above but includes sightseeing)
- General naturalist trips (to see one or more of birds, mammals, plants, butterflies, cetaceans + culture, history and archaeology)
- Domestic tours (as above)
- Safaris
- Adventure/ exploration (wildlife is an added dimension of the experience but not the *prima facia*)

Plotting these product types against levels of interest (Figure 2) allows one to begin to assess where a destination might want to position itself when working in partnership with tour operators (the primary focus of Curtin & Wilkes' research. What they are able to demonstrate is that the wildlife assets themselves (e.g. charismatic megafauna, exotic birds) can often in fact be packaged and sold as two very different products to different markets.

Hence one can go on a 'normal' mass market safari holiday where the objective is to see the 'Big Five' in a popular game reserve such as the Masai Mara (Kenya) or Kruger National Park (South Africa) – in the figure labelled Safari (a) – or one can go on a more specialist safari to lesser known destination to observe, for instance, Mountain Gorillas (Safari (b) in the figure). Similarly, an expedition could range from a volunteering trip accompanying scientists on a specific wildlife research project (Expedition a) to a more general study tour looking at general wildlife in an area (Expedition b).

FIGURE 2: SEGMENTATION ACCORDING TO LEVEL OF INTEREST IN WILDLIFE

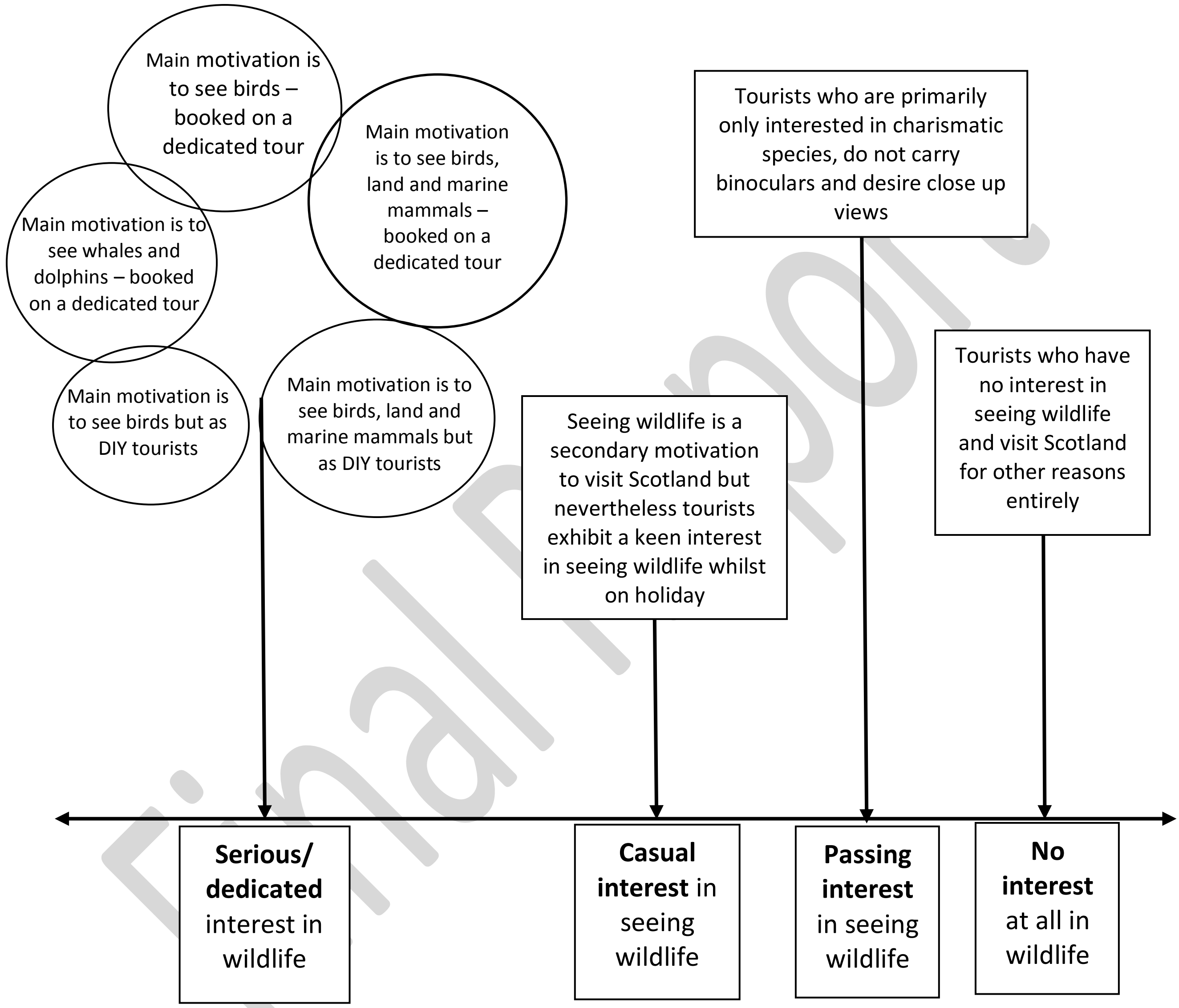


Source: Curtin & Wilkes, 2005

Using this approach in the Yorkshire context will allow YWT and its partners to look at their assets, from the massive seabird colonies at Flamborough and Bempton to the overwintering flocks at North Cave and Tophill Low to the charismatic species such as the Puffin and the Otter (found in increasing numbers on the River Hull), and to identify where additional investment needs to be made to stimulate interest from both potential tourists but also commercial tour operators who can package these assets into products to be sold. And it is essential to remember that there are different segments with varying levels of interest in wildlife, so this packaging will cover everything from trips lasting several days to excursions lasting just a couple of hours.

A useful segmentation prepared by the team that recently reported on wildlife tourism in Scotland (ICTHR, 2010) is presented below in Figure 3, on the basis that it can be also used as a tool for segmenting the market for wildlife tourism in eastern Yorkshire. The value of this approach is that it also allows one to reflect on the level to which the assets available across eastern Yorkshire can be packaged to meet the needs of visitors with different levels of interest in wildlife. Looking at this segmentation in the light of the findings of the pilot survey with visitors to three YWT reserves across eastern Yorkshire (see Section 3 of this report) suggests that the 'serious' wildlife viewers are more likely to be found at North Cave and, to a lesser extent at Spurn Point whilst Flamborough attracts those with a more casual or passing interest in wildlife.

FIGURE 3: SEGMENTATION, SCOTTISH WILDLIFE TOURISTS



Source: ICTHR, 2010

Given the importance of birds to wildlife tourism in eastern Yorkshire it is interesting to note the findings of research into the characteristics of bird-watching tourists in Australia (Green & Jones, 2010), who identify a number of different segments including:

- Dedicated birders (particularly keen to see endemic or rare birds, and birds that their friends had not seen) – most likely to purchase specialist tours
- Tourists interested in more 'exciting' birds (also referred to as 'thrill seekers') – important market for guided walks

- People with very little interest in birding

Based on other, UK-based studies of the market for wildlife tourism in general, there is no reason not to think that this broad typology is also relevant within the Yorkshire context, given the potential offered by the area's rich ornithological resources and the opportunity that exists for developing tailored products for dedicated birders on the one hand, and for the less specialist segment on the other.

Moreover, there is also the potential to use the presence of certain iconic bird species (such as Puffins and Gannets) in branding events and even the destination as a whole, so that even those tourists with no real interest in wildlife at the time nonetheless become aware of its presence and its potential.

2.7 Impacts associated with different market segments

A key point to consider when planning for wildlife tourism is the variation in impacts and hence infrastructure and management needs associated with different types of wildlife tourist since this has a direct impact on investment requirements and hence operational profitability and local economic development. It is also useful to consider the effectiveness of current marketing activities, and the extent to which opportunities to view wildlife are already being exploited. For instance, research carried out in 2004 with more than 1,000 tourists investigating how well 'Destination England' delivers against its potential found that the opportunity to see wildlife in natural habitats is a very strong motivator for tourist travel to and around England but that in reality, the opportunity to do so is not as well developed and marketed as it might be. (VisitBritain, 2004).

Curtin & Wilkes (2005) suggest that the main issues arise when wildlife viewing sites begin to attract the generalist rather than the specialist, enthusiast market. They argue that enthusiasts are knowledgeable, need little in the way of infrastructure and interpretive facilities and hence require minimal management. However, the generalist market is seen to rely much more heavily on infrastructure and even so, creates a heavy burden on the environment. In their view, "*these novice visitors require extra policing in terms of noise, behaviour and camera flashes; a serious impact given the fragility of some wildlife tourism sites"* (Curtin & Wilkes, 2005, p460).

Zografos and Allcroft (2007) suggest that in general wildlife tourists (although they use the term ecotourist) generally have a high level of educational attainment and that interpretation and other information provided to them should reflect this, particularly where it refers to the core topic of biodiversity protection. Nonetheless, it is also important that there is help with species identification (they quote research stating that only 55% of wildlife viewing facilities and sites in Scotland help with species identification) and that this is seen as an obstacle to an enjoyable or informative experience by many 'casual' wildlife tourists.

Sekercioglu (2002) argues that birdwatchers (generally considered to be the main sub-group within wildlife tourism), because they tend to come from higher educated and wealthier groups, are more likely to demand high quality accommodation where possible, although are willing to forgo this when seeking rare species. Thus they are in a position to contribute more to the local accommodation sector than other tourists in destinations where accommodation may be provided more or less exclusively for this segment.

Finally, Sekercioglu (2002) also argues that organised bird watching tours tend to have less of a local economic impact than do independent bird watchers, as they tend to bring their own guides and are least likely to use locally owned accommodation and services. This is an important point to consider when developing new products in East Yorkshire.

2.8 Fit with Yorkshire's tourism market

Yorkshire as a region has a strong and loyal repeat tourism market, with around 75% of visitors saying they have visited previously and nine out of ten visitors likely to visit again in the future[6]. Using profile information from more than 10,000 visitors contacted in the region during 2008/09, WelcometoYorkshire has undertaken a segmentation exercise using the MOSAIC tool to identify key markets within the domestic (i.e. UK) tourism market.

The research findings suggest that there are two key groups holidaying or taking day trips in the region:

- The family market, which can be broken into three segments:
    - Older families with modest incomes (quite keen on countryside excursions) – ***21% of the market***
    - Young families reliant on manual employment – particularly important in the day trip market – ***16% of the market***
    - Young families with steady incomes from two parents – interested in active sports, outdoor pursuits, often holidaying in self-catering units – ***13% of the market***
- 'Empty nesters' – just under one third of visitors to Yorkshire are aged 55 and older, with staying visitors more likely to belong to older age groups than day visitors. Again, this can be broken into three main segments
    - Affluent couples with grown up children – willing and able to afford luxury and premium products. Mainly self-catering and independent travel - 13% of the market
    - Older, retired couples with traditional views, generally visiting friends and relatives travelling by coach or rail – 8% of the market
    - Couples with grown up children who spend a lot of leisure time outdoors, again using self-catering accommodation – ***6% of the market***

Given the earlier evidence presented on the profiles of typical wildlife tourists it would appear that there are certainly areas where elements of Yorkshire's current visitor population could be encouraged to engage more with the County's wildlife heritage. This applies both to the family market and to the so-called 'empty nesters', as in both cases there are sub-groups whose profile appears to be similar to that of the 'average' wildlife tourist. For instance, the older families who enjoy countryside excursions could be a market for wildlife sites that offer ancillary facilities (catering, toilets etc) whilst younger families with steady incomes (referred to in the MOSAIC terminology as 'Happy Families') would be a key

[6] www.welcometoyorkshire.net/research/market-profile/market-fit-(mosaic) Consulted 4th May 2010

target market for events and activities aimed at introducing people to, for instance, the area's marine wildlife

2.9 Learning from best practice elsewhere

The matrix below summarises key findings from previous studies on developing wildlife tourism and from the case study visits, looking at both the supply and demand side.

TABLE 3: SUMMARY OF CASE STUDY REVIEW

Reference	Destination/ market/ segment	Key points
Dickie et al, 2006	Isle of Mull, Scotland	Presence of White Tailed Eagles (Sea Eagles) attracts around 5,000 people per year to the island, delivering impact of around £1.5 million Public viewing and protection managed by a partnership of public, private & voluntary sectors
Dickie et al, 2006	Loch Garten, Speyside, Scotland	Ospreys recommended breeding in 1958. Land purchased by RSPB in 1975 since when more than 2 million people have visited. Major investment in visitor facilities at the reserve has helped increase spending in the local economy, and to promoting Strathspey as a holiday destination. Key factor behind visitor interest in any year is the presence/ absence of Osprey chicks
Rayment & Dickie, 2001	Rathlin Island, Co. Antrim, N Ireland	RSPB organises special events to stimulate public interest in the changing seabird population, and to increase levels of business for the ferry and local island businesses. Examples include 'The Birds Return', 'Seabird Extravaganza' and 'Bye Bye Puffins (at the end of July, before they leave the island). 80% of visitors to the Island watch birds and other wildlife during their visit.
ICRT field visit	Slowinski National Park, Poland	Wildlife viewing carefully managed to minimise disturbance to over-wintering bird population in particular, but investment in 35 km of 'pedagogic' trails designed to increase general engagement with the Park's natural environment. Provide several 20 m high viewing towers around the Park to offer views over this low-lying landscape.
YWT/ ICRT field visit	Parc naturel regional des Marais du Cotentin et du Bessin	Purpose-built visitor centre acts as a focal point for all visitors and raises awareness of opportunities for viewing wildlife in a range of habitats. Considerable emphasis around the Park on interpreting the broader relationship between agricultural practices and the landscape. Wildlife tourism very much a secondary product compared to the primary tourism product which is associated with the D-Day landings/ *Le Debarquement*

2.10 Developing successful wildlife tourism - summary

The summary below of the characteristics of a successful wildlife tourism destination is based on the outcomes of study tours of two protected areas around Northern Europe where wildlife tourism is already being developed (Slowinski National Park in Poland and the Parc Naturel Régional des Marais du Cotentin et du Bessin, France) and a review of relevant literature. Summary notes from the field visits are appended.

From this background research it would appear that successful wildlife tourism destinations are those that offer:

- One or more charismatic species present for all or part of the year. This is particularly important where the species in question is used in branding a destination e.g. *Red Kite Country*
- A range of other wildlife whose presence adds seasonal interest when the principal attractor species is absent
- A variety of habitats and landscapes
- One or more focal points where wildlife viewing is managed and easy for non-specialists as well as enthusiasts
- An approach to management that seeks to reconcile public access and engagement with habitat and species protection
- Partnership opportunities between the public and private sectors, particularly in terms of providing ancillary services to tourists and day visitors
- Opportunities for volunteers and community members to assist in developing and managing wildlife viewing opportunities, including events that celebrate particular species or events in the lifecycle of these species (arrival/ return)

To the above we would add the point that there must be every effort made to ensure that local economic development opportunities are pursued during the planning, design, implementation and monitoring of any nature/wildlife tourism projects so that local residents are able to appreciate and benefit from the presence of wildlife tourists in their community.

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3 Review of eastern Yorkshire's nature tourism product

3.1 The nature tourism product in eastern Yorkshire

There are a number of nature and wildlife assets in eastern Yorkshire that are already being managed and promoted for tourism, yet as always there is the potential to both increase the range of resources available to tourists and also to enhance the quality of what exists. There is also an opportunity to combine provision for wildlife tourism with that for more general outdoor recreation (particularly walking and cycling but also pleasure boating).

The principle reserves managed for public access as well as habitat/ species conservation are, in alphabetical order:

- Bempton Cliffs (RSPB)
- Blacktoft Sands (RSPB)
- Flamborough Cliffs, including the surrounding inshore waters (YWT)
- North Cave Wetlands (YWT)
- Spurn Point (YWT)
- Tophill Low (Yorkshire Water)

There are of course many other locations around the area where wildlife viewing takes place including:

- Filey Dams (YWT)
- Burton Riggs (YWT)
- Cayton & Flixton Carrs
- Burton Constable Hall (wildlife walks around the Estate are offered throughout the year)
- Hornsea Mere
- Paull Holme Strays
- River Hull headwaters and flood plain
- Welwick Saltmarsh

In terms of wildlife one must also consider The Deep, a large, commercially-run aquarium located in Hull and which includes displays of fish from around Britain's coast. Although this is an internal environment, there is much interpretation of the UK's marine wildlife and it forms an important component of the area's overall wildlife/ nature tourism product. The other aspect of nature tourism to consider is the botanical aspect which is well served on estates such as Burton Constable and Burton Agnes (although this latter is more oriented towards horticulture/ gardens than natural habitats) as well as at YWT reserves such as Keldmarsh and Pulfin Bog.

3.2 Nature tour operators

As indicated above, there are a range of locations managed by different public and voluntary sector organisations for the purpose of wildlife viewing. Whilst all of these organisations invest in marketing their sites, they are not yet engaged in arranging tours to and around eastern Yorkshire for the purposes of wildlife viewing. Their role at present is to make available opportunities to view wildlife to local residents, day visitors from outside the area and tourists staying locally or passing through en route to other destinations. Thus there is a gap that needs to be filled by wildlife tour operators who can package accommodation, travel, access, guiding and related services and sell them on to tourists interested in experiencing East Yorkshire's rich and varied wildlife and natural heritage. With the exception of fishing boat skippers offering bird watching trips from Bridlington there are few operators active in the area.

Our market review identified the following companies currently offering at least one wildlife viewing package in eastern Yorkshire:

- Celtic Bird Tours, South Wales – 1 x bird watching tour of North-East England including Bempton, Spurn Point and Flamborough in June
- Oriole Tours, Norfolk - 2 x bird watching tours of North-East England including Bempton, Spurn Point and Flamborough in May and June

In addition, there are two local ornithologists who market their services as guides to the area's wildlife:

- Phil Cunningham (philc@phonecoop.coop)
- Steve Elliott (tanagerbirding@yahoo.co.uk)

There is no evidence to suggest that tour operators are offering anything other than birding trips. In particular, the marine interest off eastern Yorkshire is minor compared to, for instance, the cetacean viewing possible off the West Coast of Scotland or the large seal populations off North Norfolk and the Wash, the Northumberland Coast and in the Firth of Forth, hence the lack of commercial interest in this sector at present.

3.3 Seasonality

The following matrix summarises the main seasonal interests across East Yorkshire in terms of wildlife viewing. As already indicated, most commentators suggest that it is easier to develop a broad-based wildlife tourism sector if one is able to offer viewing opportunities of charismatic species as well as more general access to wildlife.

TABLE 4: SEASONALITY FACTORS TO CONSIDER

Season	Key assets
Spring	Woodland birds at Tophill Low Seabird colonies at Bempton and Flamborough
Summer	Puffins join colonies at Bempton Seabird colonies at Bempton and Flamborough
Autumn	Passage waders at Tophill Low and Spurn Point
Winter	Overwintering wildfowl at Spurn Point, Tophill Low Migrating wildfowl at Spurn Point
Year-round	Barn Owls (across East Yorkshire)

3.4 Profile of visitors to key YWT sites in East Yorkshire

3.4.1 Introduction

A pilot questionnaire survey of more than 80 visitors to three YWT reserves in Yorkshire was carried out during May and June 2010 to gain an initial insight into the current demand patterns of wildlife enthusiasts in the area. These findings should not be taken as being representative of all visitors to the area as they relate only to three locations and to people visiting in the late spring/ early summer. Nonetheless, they do raise some interesting points regarding the profile of wildlife viewers across Yorkshire and to the opportunities that exist for developing the market.

3.4.2 Visitor profile

From the basic profile information collected from visitors to the site (Table 5) it appears that Flamborough and Spurn Point appeal more to families and tourists, whilst North Cave is more popular with locals on a day trip from home and who are more likely to travel to the site alone.

TABLE 5: MAIN CHARACTERISTICS OF VISITORS TO THE RESERVES

Visited	Spurn Point	Flamborough	North Cave	All
On your own	5%	11%	19%	12%
With family	41%	74%	42%	55%
With friends	36%	6%	8%	14%
With family & friends	0%	6%	4%	4%
Organised group	18%	3%	27%	14%
Average group size	11.7	2.4	10.1	7.0
On day trip from home	41%	58%	100%	67%
On holiday	55%	39%	0%	31%
Passing through to	5%	0%	0%	1%
Passing through from	0%	0%	0%	0%
Working	0%	3%	0%	1%
Average length of stay in destination (tourists only)	4.6	5.9	n/a	5.3

It should be noted that the relatively high average group sizes recorded for Spurn and North Cave are due partly to the fact that several members of the same groups were identified at each location (an RPSB members group from West Yorkshire at North Cave and an industrial archaeology interest group at Spurn). A much larger analytical sample would presumably reduce this figure somewhat.

Unsurprisingly perhaps given their location in or close to holiday destinations, Flamborough and Spurn were more likely to be visited by tourists staying in the area whilst North Cave appears to be exclusively visited by day trippers.

3.4.3 Trip profile

From the information provided by the survey sample it appears that first-time visitors were most likely to be found at Spurn Point and that Flamborough had the largest proportion of repeat visitors, although the repeat visitor to North Cave appears to have a far higher propensity to go back to the site on a regular basis than the others, reinforcing the suggestion made in Section 3.4.2 that North Cave appears to serve a much more local market than the other two survey locations (although its location very close to the M62 does good opportunities to tap into the tourist/ transit market).

TABLE 6: LEVELS OF REPEAT VISITATION TO THE STUDY SITES

Site	n	First visit	Not first visit	Average number of visits in previous 12 months
Spurn Point	22	45%	55%	11
Flamborough	35	6%	94%	12
North Cave	26	19%	81%	23
All	**83**	**20%**	**80%**	**16**

Questionnaire respondents were also asked to indicate how important the presence of the reserve was in their decision to travel to that part of Yorkshire on the day they were interviewed (Table 7). The rationale behind this question is that it begins to demonstrate the ‘pulling power’ of different locations to different market segments, information which can be used both in developing marketing campaigns but also in calculating the net economic impact associated with the reserve’s presence in an area (the higher the percentage of visitors going to an area for whom the presence of a particular asset is the only or primary reason for the trip, the more powerful is the argument that the asset is stimulating additional spending locally). What the pilot survey findings demonstrate again is the fact that the reserve at North Cave is far more likely to be the primary destination for the people interviewed there than Flamborough, with Spurn coming somewhere in between. Again, this seems to re-inforce the point made earlier that North Cave and Spurn are more likely to be attracting the enthusiast market and Flamborough the generalist, casual wildlife viewer.

TABLE 7: IMPORTANCE OF THE RESERVE IN THE DECISION TO TRAVEL TO THAT PART OF EAST YORKSHIRE

Site	n	Only reason	Main reason	Minor reason	No relevance
Spurn Point	18	39%	56%	6%	0%
Flamborough	31	6%	26%	42%	26%
North Cave	21	57%	43%	0%	0%
All	**70**	**30%**	**39%**	**20%**	**11%**

3.4.4 Activities undertaken at the site

Questionnaire respondents were asked to indicate the main activity that they were doing at the reserve on the day of the interview and were asked to tick one box only. Unfortunately, some respondents ticked more than one but rather than ignore the data altogether, the responses are summarised below to provide an indication only of the relative popularity of different activities at the three reserves. A key point to note is the extent to which Spurn Point attracts a far greater variety of uses than the other locations – some respondents went there 'because they've never been'; others were interested in its military/industrial heritage. The popularity of birdwatching and general wildlife at all three locations supports earlier statements that these are the most important sub-sectors of nature tourism.

TABLE 8: ACTIVITIES UNDERTAKEN AT THE THREE RESERVES

Activity	Spurn Point[7]	Flamborough	North Cave	All
n	30	52	34	116
Go birdwatching	20%	21%	53%	30%
Fishing	10%	2%	0%	3%
Watch shipping	7%	2%	0%	3%
Flowers	0%	2%	9%	3%
Insects	0%	2%	0%	1%
Mammals	0%	4%	0%	2%
Amphibians	0%	4%	0%	2%
Wildlife	10%	17%	18%	16%
Geology	0%	6%	0%	3%
Walk	13%	27%	12%	19%
Visitor centre	0%	0%	0%	0%
Spend time with friends & family	3%	6%	6%	5%
Other	37%	8%	3%	14%

[7] A visitor survey carried out at Spurn some 40 years previously found the main reasons for visiting Spurn to be 'curiosity' (27%), walking (13%), picnicking (11%), bird watching (10%) and fishing (8%). The same survey found that fishermen were not likely to do much else, and that bird-watchers were likely to indulge in other nature studies (Usher et al, 1974). The function of Spurn as a destination for both specialist and more casual outdoor recreation appears to have changed relatively little since the 1970 survey. It is thus important that any developments at Spurn seek to cater for people with little or no interest in wildlife and that attempts are made through marketing and product development to convert this group so that they have a stronger interest in the natural heritage of the area – in other words, moving them along to the left in the segmentation model presented on page 11 of this report.

3.4.5 Engagement with, and awareness of, reserves around Yorkshire

Respondents to the questionnaire implemented at three YWT sites were asked whether they had visited, heard of but not visited or not even heard of, ten wildlife viewing sites across Yorkshire. It is evident that the main wildlife coastal viewing locations of Bempton, Flamborough Cliffs and Spurn Point are by far the best known and most visited with at least two-thirds of interviewees having visited at least one of these key sites. Interestingly, once people interviewed at North Cave were excluded from the analysis, visitation to that site dropped considerably to only 14% of the survey sample, confirming the earlier assertion that North Cave appears to attract the more specialist birder. Although the focus of this work is to develop nature tourism in eastern Yorkshire, it is important to recognise synergies that exist with wildlife and related viewing points inland. For instance, it is useful to note the varying levels of awareness of Potteric Carr (one of the few sites in the region where one can view/ hear bittern) and Dearne Valley/ Old Moor – the RSPB's flagship site in South Yorkshire. One final point to note is the low recognition for the Trust's reserves at Askham Bog and Welwick Saltmarsh. The latter could be packaged with Spurn Point to increase awareness of, and visitation to, that part of East Yorkshire. Doing so would also help to extend lengths of stay in the area and even convert day visits into overnight trips.

Table 9: Visits made to wildlife sites around Yorkshire

Site	Visited (excluding those interviewed on site)	Visited (including those interviewed on site)
Flamborough Cliffs	92%	95%
Bempton Cliffs	73%	73%
Spurn Point	67%	76%
Fairburn Ings	43%	43%
Blacktoft Sands	34%	34%
Dearne Valley - Old Moor	27%	27%
Potteric Carr	24%	24%
Askham Bog	19%	19%
North Cave Wetlands	14%	41%
Welwick Saltmarsh/ Hodgsons Fields	4%	4%

Table 10: Awareness of key wildlife sites around Yorkshire

Site	Heard of but not visited
Dearne Valley - Old Moor	27%
Bempton Cliffs	25%
Blacktoft Sands	20%
North Cave Wetlands	20%
Potteric Carr	19%
Askham Bog	18%
Fairburn Ings	18%
Spurn Point	16%
Welwick Saltmarsh/ Hodgsons Fields	11%
Flamborough Cliffs	5%

Table 11: Lack of awareness of wildlife sites around Yorkshire

Site	Not heard of
Welwick Saltmarsh/ Hodgsons Fields	86%
Askham Bog	63%
Potteric Carr	57%
Dearne Valley - Old Moor	47%
Blacktoft Sands	46%
Fairburn Ings	39%
North Cave Wetlands	39%
Spurn Point	8%
Bempton Cliffs	1%
Flamborough Cliffs	0%

3.4.6 Spending by YWT reserve visitors

This pilot survey collected information on spending patterns by visitors to the three locations. Respondents were asked to record how much they had already spent during the day, and how much they intended to spend before the end of the day (if on a day trip from home, up until the end of the trip). Because of the small sample sizes and short period over which the survey took place, this data is presented below mainly for illustrative purposes. What it demonstrates is that spending in all three locations is lower than one would expect for people on a leisure day visit to the countryside or coast, or indeed for holidaymakers in Yorkshire. Whether this is due to the unrepresentative size of the sample or indeed is illustrative of the low spending habits of wildlife tourists in Yorkshire can only be answered by undertaking a year-round survey of visitors to the three locations and by achieving a sample size of several times that achieved in the pilot.

Table 12: Average spend per head[8] by visitors to the three study sites on the day of the survey

Area of Spending	Spurn Point	Flamborough	North Cave	All
Parking	£ 1.09	£ 1.60	£ -	£ 0.96
Food & drink	£ 3.64	£ 5.06	£ 0.82	£ 3.35
Souvenirs	£ 0.68	£ -	£ -	£ 0.18
Guides & Maps	£ 0.23	£ -	£ -	£ 0.06
Clothing	£ 1.82	£ 0.14	£ -	£ 0.54
Fuel	£ 5.98	£ 1.77	£ 0.46	£ 2.48
Public transport	£ -	£ 2.14	£ 4.92	£ 2.44
Accommodation	£ 0.86	£ 5.06	£ -	£ 2.36
Other	£ 0.25	£ 0.23	£ -	£ 0.16
Total	**£ 14.54**	**£ 16.00**	**£ 6.19**	**£ 12.54**

What the data presented in Table 12 appear to illustrate is that, perhaps unsurprisingly, visitors to North Cave spend far less per trip than people interviewed at the other locations.

[8] This figure is the average spend per head, NOT the average spend per transaction which would be higher, since not all visitors spent on every item listed in the questionnaire

The relatively high spend per head on public transport is due to the presence in the survey sample of several people from the same organised tour who spent £10.00 each on hiring the coach. Similarly, the apparently high spend per head on accommodation by Flamborough respondents reflects the fact that a higher proportion of tourists were interviewed on this site.

3.5 SWOT analysis of nature tourism in eastern Yorkshire

Based on the information presented in the preceding section, the following represents a summary SWOT analysis of the area's nature tourism product

TABLE 13: SWOT ANALYSIS OF EASTERN YORKSHIRE'S NATURE TOURISM PRODUCT

Strengths	**Weaknesses**
• Good range of wildlife and habitat • Some spectacular/ charismatic species including Puffins, seabird colonies at Bempton/ Flamborough • Wildlife viewing opportunities for most of the year including offshore viewing (e.g. boat trips out of Bridlington) • Viewing locations spread across whole area • Several organisations already involved in managing and promoting wildlife • All three key organisations (YWT, RSPB, YW) have ambitious plans to develop their own key reserves	• Most locations poorly developed • Low awareness of some locations even amongst existing specialist market • Lack of co-ordinated marketing • Low profile for private sector in the area • Relatively inaccessible from most parts of the UK • Lack of common vision and coherent strategy for wildlife tourism that is shared by all partners
Opportunities	**Threats**
• Build on presence of wide range of iconic/ charismatic species • Media coverage of wildlife increasing • More people holidaying in the UK as a result of changing economic circumstances and increasing awareness of domestic tourism potential • Regeneration funding available for rural tourism and heritage projects • Managed coastal re-alignment could create new habitats in the Humber Estuary	• Competition from other parts of the UK (e.g. North Norfolk, Scotland) • Uncertainties about future of HLF funding for conservation and access • Current government's threat to Quangos including Natural England may reduce resources available for general habitat management and monitoring • Climate change affecting habitats • Farming practices affecting habitats • Industrial practice affecting habitats

4 Estimating the volume of wildlife tourism in eastern Yorkshire

4.1 Introduction

To quantify the current volume of wildlife tourism in eastern Yorkshire (and hence provide a baseline against which the impacts of future investment can be measured) requires data on the level of activity at the main wildlife sites in the region. The information presented below has been collated from a range of sources and provides the best estimate available on patterns of engagement with wildlife across the study area.

4.2 Estimating the volume of wildlife tourism in eastern Yorkshire

Our estimate of the amount of wildlife viewing that occurs elsewhere in Yorkshire is based on a combination of visitor survey and monitoring data collected by the local authority, Welcome to Yorkshire and Visit Hull & East Yorkshire (VHEY). The regional survey of tourists to Yorkshire undertaken in 2008/09 found that 3.5% of visitors to the area engage in wildlife viewing at some point in their trip, slightly lower than the average for the region as a whole (4.3%). However, wildlife viewing was the primary purpose of the visit for 0.6% of all visitors to eastern Yorkshire, far higher than the 0.1% figure for Yorkshire as a whole[9].

Translating this into numbers requires data on the level of tourist and day visitor activity in eastern Yorkshire. The most recent data available from VHEY[10] indicates that around 7 million day visitors visit eastern Yorkshire over the course of a year with a further 611,000 tourist trips being made delivering 2,016,300 bednights (average length of stay in eastern Yorkshire is 3.3 nights).

TABLE 14: VOLUME OF WILDLIFE TOURISM IN EAST YORKSHIRE

Visitor type	Number in East Yorkshire	Estimate of people engaging with wildlife (3.5%)	Estimate of visitors for whom wildlife viewing is the primary activity (0.6%)
Day visitor	7,000,000	245,000	42,000
Tourist	611,000	21,385	3,670
Total	7,611,000	266,385	45,670

Sources: VHEY, Welcome to Yorkshire. Additional analysis by ICRT

Using the survey data it appears that more than a **quarter of a million people visiting eastern Yorkshire take time during their trip to view the area's wildlife**, and for more than **45,000** of these (around 17% of the total) the area's rich wildlife interest is the primary reason for their trip.

[9] Source: VHEY, personal communication, 23 July 2010
[10] Source: VHEY, personal communication, 23 July 2010

4.3 Activity at 'point' locations

Table 15 summarises available throughput data for the main so-called 'point' locations that are actively marketed and promoted as wildlife viewing spots, and where visitor activity is generally monitored either through ticket sales, pedestrian or vehicle counters or other modes. In all instances, the annual visitor figures provided are estimates and should be treated with an element of caution.

TABLE 15: VOLUME OF ACTIVITY AT 'POINT' LOCATIONS

Site	Owner/ manager/ operator	Estimated annual visitor figures	Note
Bempton Cliffs	RSPB	55,000	Source: Dickie et al, 2006
Bempton/Flamborough boat trips[11]	YWT	1,700	Source: Dickie et al, 2006
Spurn Point	YWT	48,000	Based on car parking ticket sales, and average of 3.4 people/ car[12]
Tophill Low	Yorkshire Water	7,000	Data provided by YW ranger
Total		**111,700**	

4.4 Activity elsewhere

Assuming that around 112,000 of these visits are made to the point locations previously indicated, then the remaining 155,000 trips[13] must taking place at locations including North Cave Wetlands and Flamborough Cliffs (popular wildlife viewing locations but where no visitor details are available) and at other points around the area including less accessible parts of the coastline, the Humber Estuary and inland locations. For instance, sources at Burton Constable Hall report hosting many visitors who go on nature and wildlife walks through the Estate.

For comparative purposes, it is interesting to note that the survey of visitors to three YWT reserves found that for 30% of them their visit to the reserve was the primary reason for their visit to East Yorkshire that day, again confirming that 'casual' wildlife viewing, where it forms part of a more varied day out or trip, is the order of the day for many people.

[11] In 2010 YWT ran 13 boat trips under its 'Living Seas Safari' programme. All trips were fully booked, with 194 adults and 66 children (260 in all) taking part. A further 9 trips were cancelled because of bad weather.
[12] This is the average group size for leisure day trips to the countryside as reported in the last national survey of leisure day trips published by Natural England and partners in 2006
[13] In section 4.2 we estimated the total population of wildlife tourists to be around 267,000

Table 16: Importance of the presence of the reserve in the decision to visit Eastern Yorkshire

My trip to the reserve today is	The only reason for coming to this part of E. Yorkshire today	The main reason for coming to this part of E. Yorkshire today	A minor reason for coming to this part of E. Yorkshire today	Of no relevance at all to my reason to come to this part of E. Yorkshire today	Total
N	21	27	14	8	70
%	30%	39%	20%	11%	100%

Source: ICRT

4.5 Implications

From an economic development perspective (and this of course is the focus of this research), it is important to be able to capture the spending associated with all wildlife tourism visits and particularly those that are not made to a wildlife centre at present.

As demonstrated by the findings of the questionnaire survey implemented at the three YWT locations across eastern Yorkshire (see Section 3.4.6) by far the largest proportion of wildlife tourist spending is away from the locations where wildlife is viewed with most currently being spent on fuel, meaning that very little of the spending remains within the local economy (retailers make around 1.5% profit on a litre of petrol[14]). Thus developing new nodes for attracting visitors and stimulating increased spending at existing sites should be a primary objective for YWT and its partners, as should reducing leakages out of the local economy by maximising local sourcing wherever possible.

[14] http://www.telegraph.co.uk/news/1907196/Oil-firms-announce-record-profits-as-petrol-nears-5-gallon.html Consulted 23rd July 2010

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5 The economic contribution of wildlife tourism in eastern Yorkshire

5.1 Method

A number of previous studies of the economic benefits of wildlife or nature tourism were consulted to provide guidance on the approach to be used in calculating the contribution of wildlife tourism to East Yorkshire's economy, including:

- Dickie, I (2004) *Estimating spending by visitors to RSPB reserves*
- International Centre for Tourism and Hospitality Research (2010) *The Economic Impact of Wildlife Tourism in Scotland*
- Rayment et al (2000) *Valuing Norfolk's Coast. The Economic Benefits of Environmental and Wildlife Tourism*
- Wells, M.P. (1997) *Economic Perspectives on Nature Tourism, Conservation and Development* Washington D.C.: World Bank

In addition, the findings of our pilot survey of visitors to Spurn, North Cave and Flamborough cliffs provided primary data on spending associated with trip to these locations by tourists and day visitors.

5.2 Estimating direct spending by wildlife tourists

Calculating the value of wildlife tourism in eastern Yorkshire requires an understanding of spending patterns by tourists and visitors to the area. Current data available from VHEY indicates an average spend in eastern Yorkshire per trip (day visitor and tourist combined) of £52.82 giving a potential total spend per annum associated with wildlife tourism of £16.7 million, of which £2.9 million (17%) is spending generated by visitors to eastern Yorkshire for whom wildlife viewing is the primary activity.

TABLE 17: INITIAL ESTIMATE OF VALUE OF WILDLIFE TOURISM TO EASTERN YORKSHIRE'S ECONOMY

Segment	n	days[15]	Spend per day (VHEY figure)	Total spending
People engaging with wildlife during their visit				
Day visitors	245,000	245,000	£52.82	£12,940,900
Tourists	21,385	70,571	£52.82	£3,727,534
Total	***266,385***	***315,571***		***£16,668,434***
People for whom wildlife viewing is the primary activity				
Day visitors	42,000	42,000	£52.82	£2,218,440
Tourists	3,670	12,111	£52.82	£639,703
Total	***45,670***	***54,111***		***£2,858,143***

[15] Tourists stay an average of 3.3 nights in East Yorkshire

However, this figure of £16.7 million probably an **overestimate,** as spending by countryside visitors on a day trip from home tends to be lower than associated with other forms of day trip such as shopping excursions or visits to theme parks etc and as indicated in Table 14, day visitors far outnumber tourists in the overall population of wildlife viewers in eastern Yorkshire. The most recent UK leisure day trip survey (VisitEngland, 2006) found an average spend per head, per leisure day trip of £25.04 although visitors to the seaside and coast spent only £19.79, and visitors to the countryside £13.38.

However, there are other sources of data that can also be used to estimate the value of wildlife tourism to the local economy. Table 18, below, uses expenditure data drawn from a number of sources to provide further estimates of total spending generated in the area by those wildlife tourists and day trippers for whom wildlife viewing is the primary purpose of their visit to the area.

TABLE 18: ECONOMIC IMPACT ESTIMATES USING ALTERNATIVE SPENDING DATA

Source	Spend per head figure	Spending by 42,000 day visitors	Spending by 3,670 tourists staying 12,100 days	Total spending	Spending at 2010 prices
Blake et al (2009) Wildlife Tourists in Scotland	£339 per trip (tourists only, 2009 prices)	-	£1,244,130	£1,244,130	£1,281,454 (tourists only)
Dickie et al (2006) Visitors to RSPB Bempton	£10.58 (2005 prices)	£444,360	£422,459	£866,819	£1,004,881
ICRT (2010) Visitors to YWT sites in East Yorkshire	£12.54 (2010 prices)	£526,680	£500,722	£1,027,402	£1,027,402
RSPB (1999) Visitors to North Norfolk Coast	£8.50 for day visitors, £14.86 for overnight tourists (1999 prices)	£357,000	£593,360	£950,360	£1,302,748
VisitEngland 2006	£13.38 (countryside day visitors, 2005 prices)	£561,960	-	£561,960	£651,466 (day visits only)

Based on the above, it would appear that wildlife tourism in eastern Yorkshire currently generates in excess of £1 million per annum for the area's economy in direct spending by people encouraged to spend time in the area for the primary purpose of tourism. For the purposes of this exercise, an estimate of £1.1 million is proposed which is the average based on the Dickie et al, ICRT and RSPB derived estimates. Given that such visitors are in a minority (around 17%) of all people who spend at least some time viewing wildlife (see Table 14), in reality the **direct economic impact is likely to be closer to £6.5 million per annum.**

5.3 Economic and employment impacts of this spending

To provide an estimate of the total economic and employment impacts of this spending we have referred to two separate methodologies designed for wildlife tourism:

- Dickie, I (2004) Estimating Spending by Visitors to RSPB Sites
- SQW (2006) Wildlife Attraction: Visitor Expenditure Model

The table below uses the indirect and induced spending multipliers and employment multipliers proposed in those reports, uprated where necessary to reflect 2010 prices, to provide some estimates of the total impact of wildlife tourism in East Yorkshire on the local economy.

	RSPB	**UKBAP**
Direct spending	£6,500,000	£ 6,500,000
Multiplier for indirect & induced spending	0.34	0.57
Additional economic activity associated with initial injection	£2,210,000	£ 3,705,000
Total value of economic activity	**£8,710,000**	**£10,205,000**
Cost per FTE job	£49,900	£61,120
Total FTE jobs supported	**175**	**167**

Based on the above analysis and in the absence of more location-specific multipliers, it would appear that **wildlife tourism in** eastern **Yorkshire currently generates between £9 and £10 million for the area's economy and supports somewhere in the region of 170 jobs.**

In addition to this must be added the expenditure by YWT and others on managing their reserves. Data is currently only available for the YWT operations in eastern Yorkshire where they spend around **£460,000** per annum on conserving and managing the wildlife resource. Using guideline figures from the RSPB economic impact appraisal methodology of around £50,000 per FTE position, this suggests that a further 9.2 FTE jobs are supported in eastern Yorkshire directly as a result of this spending.

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6 Maximising the potential of wildlife tourism for eastern Yorkshire

6.1 Introduction

One of the objectives of this research has been to present guidance on how investment in eastern Yorkshire's wildlife tourism sector should proceed with a view to maximising its tourism and economic development potential. This section identifies the potential economic worth of nature and wildlife tourism assuming a number of strategic investment opportunities are followed, and presents recommendations on what those investments should be.

6.2 The current situation – a reminder

As indicated earlier in Sections 4 and 5 of this report, nature and wildlife tourism in eastern Yorkshire currently:

- Attracts more than 112,000 visitors to the main 'point' wildlife viewing locations
- Attracts another 155,000 or so to other locations around the area
- Is worth around £9.5 million to the economy
- Supports around 170 jobs locally

The aspiration of YWT and its partners is to stimulate a significant increase in both the volume and value of nature tourism to the local area in the coming years.

6.3 Achieving growth – the potential

In order to achieve growth in this increasingly important area, YWT and its partners need to achieve a number of separate but related objectives:

- **Increasing levels of engagement with the natural heritage of the area by day visitors and by tourists staying locally**. This will raise visitation and spend levels at the area's wildlife-based attractions as well as enhance their overall trip or holiday experience. For instance, the regional survey of tourists to Yorkshire undertaken in 2008/09 found that 3.5% of visitors to East Yorkshire engage in wildlife viewing at some point in their trip, slightly lower than the average for Yorkshire as a whole (4.3%).

  VHEY figures indicate that East Riding receives some 7 million day trips a year. So even increasing wildlife engagement levels to the regional average will deliver another 56,000 visits to wildlife sites[16].

  But even this is an underestimate as it only considers diverting day visitors and tourists from one type of attraction or destination to another. It should be possible to stimulate an overall increase in public interest in the area's wildlife tourism product through better

[16] 0.8% x 7 million

marketing of existing attractions as well as of the proposed developments. Over the course of the next five to ten years or so, given appropriate levels of investment in promoting the area's wildlife viewing opportunities to people living in the main catchment area, there should be no reason why an additional 200,000 trips or so cannot be made by day visitors to the area. These can be made throughout the year to sites, events and festivals promoting the ever-changing seasonal viewing opportunities.

Thus a target of **256,000 extra day visits by people interested in viewing wildlife** is proposed, with a projected achievement date of the middle part of this decade. Even at current spending levels, that could generate an additional direct cash injection into the local economy of at least **£3.84 million per annum**[17]

- **Increasing levels of engagement with the natural heritage of the area by tourists staying locally.** As indicated in Section 4 of this report, there are also some 611,000 tourists staying locally, and increasing levels of engagement by this group to regional levels (i.e. securing an uplift from 3.5% to 4.3% engagement) will deliver an extra 5,000 visits[18] to wildlife viewing locations. With an average tourist spend per head per day this would quickly move another £264,000 over into the wildlife tourism budget for little effort at all. As the proposed development proposals are implemented, the aspiration should be to increase overall levels of engagement with wildlife by tourists staying in the area to 7% by the end of the decade - a doubling of current levels. Thus even assuming no growth in total numbers of tourists staying in eastern Yorkshire on holiday, the number engaging with wildlife would rise to 42,770. With an average length of stay of 3 nights, and an average spend per day of £52.82, this would move around £6,780,000 into the wildlife tourism account of which 50% - £3,390,000 – would be new spending on wildlife tourism holidays.

- **Converting day visitor business into overnight business** – this almost automatically increase levels of spending in the area as people book into tourist accommodation and also spend more on food & drink. Research suggests that there are currently some 42,000 day visitors spending time in the area each year for whom wildlife viewing is the primary purpose of their trip. And this specialist interest group must be the initial target market in terms of converting day trippers into overnight business. Obviously some of these trips will be made by people living relatively locally and for whom there is no point in staying in tourist accommodation – they are too close to their own home. But the area attracts many day trippers from South and West Yorkshire and parts of the Midlands, people for whom an overnight stay in the area could be an attractive proposition. So by increasing the range and improving the quality of viewing opportunities, and by linking up with the accommodation sector to offer packages to potential customers, it will be possible to convert some of this existing day business into overnight guests. An ambitious but not unrealistic target would be to convert 50% of these day visits into overnight trips within the next 5 years or so, which would deliver an

[17] Assuming an average spend per head on the day of around £15.00 at current price levels (see table 18)
[18] 0.8% x 611,000

extra 21,000 bednights. Assuming an average additional spend per night of £40.00[19] this would deliver an additional **£840,000 direct spending** in the East Yorkshire economy

- **Extending the length of stay of overnight visitors** – again, this will increase levels of spending, particularly in the accommodation sectors. Average length of stay in East Yorkshire, according to VHEY figures, is around 3 nights. No data is available specifically for those tourists coming to view wildlife, but assuming that the development proposals are able to stimulate an increase of one night per stay for each of the 3,670 tourists coming to the area primarily for the purposes of wildlife viewing, this extra 3,670 bednights will deliver **a further £194,000[20] in direct spending locally** at present day prices. In some ways, this should represent the easiest target for conversion assuming that the accommodation sector is encouraged to work closely with YWT, RPSB, YWT and VHEY on developing packages and enhancing product and services at wildlife sites around the area

- **Attracting new overnight (tourist) business** will be the biggest challenge for those involved in developing the area's wildlife tourism product. Developing the area's profile as a wildlife tourism destination will certainly require considerable investment and will need to be implemented as part of a broader destination marketing campaign. A target for the end of the decade should be an overall trebling of the number of people coming to East Yorkshire on holiday specifically to view wildlife and engage with the area's nature tourism product. So an additional 7,340 or so overnight tourists, staying for an average of 3.3 nights will deliver an **additional £1,280,000[21] or so direct money into the regional economy.**

  In the longer term (i.e. five to ten years) as more reserves are developed (see Section 7.5) then a target of an extra **20,000 tourist trips** is projected, injecting a further **£3.49 million[22]** into the area's economy at current price levels

[19] Current spend per day by tourists is £52.82 according to VHEY, and our research found an average spend per day of £12.54 for wildlife tourists at the YWT sites. Subtracting existing day visitor spend from total tourist spend gives the differential of £40.28, rounded down to £40.00 for the purposes of this exercise

[20] 3,670 x £52.82

[21] 7,340 x 3.3 x £52.82

[22] 20,000 x 3.3 x £52.82

6.4 Summary of potential visitor and economic impacts

Taking the market-led approach to exploiting the opportunities associated with developing wildlife tourism in eastern Yorkshire discussed above allows us to prepare some realistic targets for the sector's contribution to the local economy in the coming decade. The impacts associated with the various segments are collated below.

Opportunity	*Impact*	*Direct value*
Increasing day visitor engagement with wildlife to current, Yorkshire levels	56,000 additional visits	£840,000
Increasing overall number of visits from main day visitor catchment	200,000 additional visits	£3,000,000
Increasing level of tourist engagement to current, Yorkshire levels	21,380 additional trips (64,140 bednights)	£3,390,000
Converting specialist day visitors to overnight visits	21,000 extra bednights	£840,000
Extend length of stay of existing specialist wildlife tourists	3,670 extra bednights	£194,000
Increasing number of specialist tourist trips (Short term)	22,120 extra bednights from 7,340 additional visits	£1,280,000
Increasing number of specialist tourist trips (longer term)	66,000 additional bednights from 20,000 extra tourists	£3,490,000
Total		***£13,034,000***

In all, it is projected that there is the potential to generate an additional 300,000+ visits to the area for wildlife tourism purposes, and a further 177,000 or so additional bednights.

To provide an estimate of the indirect and induced impacts of this additional spending, the impact assessment models used in Section 5.3 are replicated using these new market projections to provide an assessment of the additional contribution that could be made to the area's economy.

	RSPB model	**UKBAP model**
Additional direct spending	£13,034,000	£13,034,000
Multiplier for indirect & induced spending	0.34	0.57
Additional economic activity	£4,431,560	£7,429,380
Total value of new economic activity	**£17,465,560**	**£20,463,380**
Cost per FTE job	£49,900	£61,120
Total new FTE jobs supported	**350**	**335**

Thus we would expect the growth potential of the area's wildlife tourism sector to be somewhere around **£19 million**, sufficient to support an additional 340 or so extra jobs in the local area.

Adding this to the current levels of activity suggests that there is the potential to raise by a factor of three the contribution of wildlife tourism to the economy of the area, from its current level of £9.5 million and 170 jobs to £28.5 million and 510 FTE jobs.

7 Broadening the benefits of investment in wildlife tourism facilities – prospects for action

7.1 Introduction

As indicated earlier in this report, the YWT, RSPB and Yorkshire Water all have plans to upgrade visitor facilities and other aspects of their key reserves around eastern Yorkshire. Plans have already been drawn up by RSPB to create a Seabird Centre at their Bempton Cliffs reserve. Yorkshire Wildlife Trust has detailed proposals to extend the size of the reserve at North Cave and to add new visitor facilities. Funding applications have also been submitted by YWT for the replacement of visitor interpretation and related services at Spurn Point and for the upgrading of the cafe and toilet facilities there.

YWT is also making plans for a small marine interpretive and activity centre at South Landing, Flamborough, to raise visitor awareness of the rich natural heritage found along the East Yorkshire coast. Finally, it is understood that Yorkshire Water is contemplating a major investment in its visitor centre at Tophill Low north of Beverley to help raise visitor awareness of, and engagement with, the flora and fauna at that location.

When considering how best to stimulate economic and employment benefits through wildlife tourism (or indeed any form of tourism) there are a number of key issues[23] to consider over and above the likely impact on the habitats and species themselves:

- Is the development associated with activities that are not easily substitutable? In other words, will the development attract new markets and stimulate new business (i.e. generate additional spending) or will it merely divert visitor activity and/ or spending from other businesses or sites in the area?
- To what extent will the development convert day trips into overnight stays? Will it increase average spend per head over and above current levels.
- How can leakages from the local economy be minimised. What local supply chains can be developed to source materials, goods and services locally?
- How much employment created by the developments can be offered to local people. Is additional training or business support required to enable local people to take up these opportunities?
- Will the developments deliver year-round activity or merely support seasonal use?
- Is it possible to charge admission fees to sites of particular wildlife interest, and will the costs of collecting this income exceed the revenue generated?
- Is it possible to stimulate partnerships between the private and voluntary sectors on the one hand and local communities on the other, in terms of developing products and delivering services ?

[23] This list is based on the outcomes of research by Font et al (2004), ICTHR (2010),the ODI & SNV (Ashley, 2006) and the RSPB (undated)

- Is there scope for using investment in tourism facilities and the resulting activity to deliver (directly or through secondary means) enhanced community facilities?
- What opportunities exist for tapping into the formal and informal education systems and networks?

7.2 Learning from elsewhere

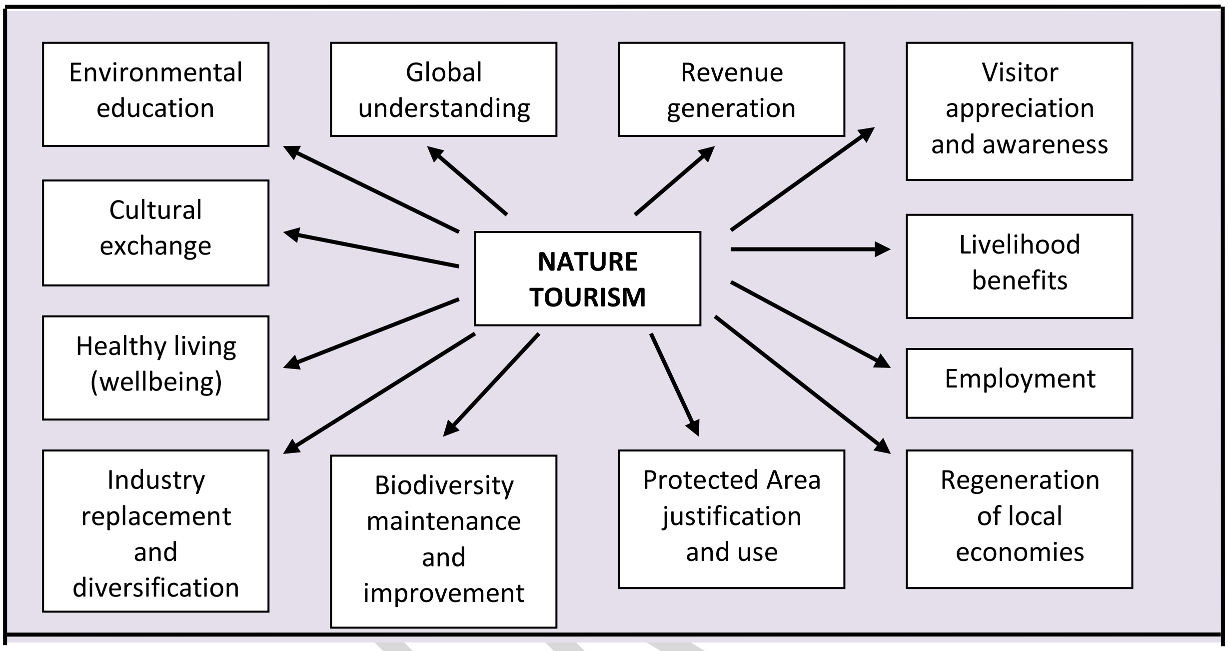
Based on the experience of the study visits to the Parc Naturel Régional des Marais du Cotentin et du Bessin (France) and Slowinski National Park (Poland) and of a broader review of wildlife tourism development and marketing (see also Section 2.9), the following appear to be key issues to consider:

- Having a critical mass of wildlife viewing opportunities around the destination, that offer a range of different habitats and species and that provide year-round interest
- Providing a central visitor orientation/ information centre that directs visitors around the destination to those locations most suited to their particular interests. Such a centre also acts as a knowledge bank, and can be used to provide access to more detailed information as and when desired by the specialist nature tourism market
- Creating a focal website promoting locations, seasonal activities, events and linking in with all key organisations (public, private and third sector) catering for tourists and day visitors interested in the area's natural heritage
- Maximising wildlife viewing opportunities including on-water provision – boat trips for instance offer a commercial opportunity to local entrepreneurs and provide an additional experience for casual visitors and enthusiasts alike
- Being very focussed on what areas are to be developed for public access and which parts of a protected area are zoned only for wildlife
- Identifying those key species (mainly charismatic birds or mammals) that are likely to attract casual visitors and then building viewing, interpretation and marketing activities around them
- Seeking to deliver year-round interest in the destination through the identification and development of a complementary range of products that celebrate the area's USP as a destination. For example, a 2008 strategy prepared for the LEADER-funded Coast, Wolds, Wetlands and Waterways project identified farming and rural heritage, hidden waterways, the area's Country Houses and Estates and the vanishing coastline and lost villages of Holderness as products worthy of further development. Importantly, almost every one of these has a nature-tourism dimension that can be further strengthened

7.3 The broader benefits of investment in wildlife & nature tourism

Whilst the focus of this paper has been on the likely economic benefits associated with investment in wildlife or nature tourism across eastern Yorkshire it is important to recognise that there are a wide range of potential benefits arising from nature tourism. Figure 4 summarises these potential benefits

FIGURE 4: BENEFITS OF NATURE TOURISM



After Bell et al, 2007

Missing from the above figure are the additional tax revenues that arise for national and local government as a direct result of any increase in overall tourism spending in the economy – these indirect economic impacts can be an important justification supporting investment proposals and should not be overlooked in any detailed financial appraisal of the proposed YWT and RSPB developments.

7.4 Anticipated impacts of the new YWT developments at Spurn, North Cave and Flamborough

7.4.1 Spurn Point

Advice from YWT is that the primary reason for the investment in new facilities is to enhance the quality of the experience for existing users and visitors. Tourism-related proposals include enhancing the quality of interpretation, catering and retail provision at the site, opening up the lighthouse to (paid-for) public access as well as more basic infrastructural investment designed to protect the fragile landscape and habitat from damage.

Current baseline throughput is around 48,000 visitors a year at Spurn and the proposals do not see this figure increasing. Thus economic growth will be delivered through increasing visitor spend onsite and elsewhere in East Yorkshire during their trip. Assuming that the current average spend per head by Spurn Point visitors of £14.54 (see Table 12) can be raised through this investment to the UK average for all coastal leisure day trips (as indicated in Section 5.2, this was £19.79 at 2006 levels, equivalent to £22.27 in 2010), then there will be an additional £371,000 or so spent in the local economy, sufficient to support around 7.5 FTE jobs at present price levels[24]. Over and above this impact will of course be higher levels of visitor satisfaction and understanding of the wildlife and heritage of Spurn Point and the surrounding area.

Investing in enhanced visitor facilities at Spurn Point is the only way that this site can be used as a tool for uplifting the overall profile and economic contribution of wildlife tourism to the Coast, Wolds, Wetlands and Waterways triangle.

7.4.2 North Cave

The proposals at North Cave revolve around extending the existing reserve by creating a number of new wetlands and by installing some basic visitor facilities (at present there is only a portaloo and a mobile catering van run by a local entrepreneur). No statistics exist at present on levels of activity at the site although anecdotal evidence suggests that it attracts several thousand visits a year by bird enthusiasts as well as a number of local people who use the reserve more as a place for a walk in the countryside. In the absence of baseline data at this stage, it is not possible to provide an estimate of the likely long term economic impact of the development.

It is recommended that over the coming years YWT invests considerably in this site to raise its profile as the gateway YWT reserve for the Coast, Wolds, Wetlands and Waterways Nature Tourism Triangle. Doing so will allow YWT and its partners to provide better orientation to visitors coming into the area, whether or not wildlife viewing is the primary purpose for their visit. Indeed, this site could become a key point for converting general visitors into nature tourists.

7.4.3 South Landing, Flamborough

YWT has agreed terms with East Riding of Yorkshire Council regarding the refurbishment of a former cafe at South Landing and the creation of a small interpretive centre that will act as a base for the interpretation of the area's marine heritage (given that the RSPB are proposing to develop a Seabird Centre a few miles up the coast at Bempton, this represents a sensible approach to diversifying the area's wildlife tourism product). Again, at present there is no baseline information on current levels of visitor activity at the South Landing nor are there any forecasts on likely levels of activity in the future. Thus it is not possible to provide an estimate of the likely long term economic impact of the development.

Diversifying the product offer to include a small interpretation centre based on the area's marine heritage is another key element for extending the range of facilities available to tourists. This location is convenient for many holidaymakers and day visitors, and has the added benefit of potential links with the RNLI. Should demand for this centre exceed its capacity to accommodate visitors, a longer-term option should be to develop a new marine wildlife centre as part of the much larger Bridlington marina initiative championed by the Harbour Commissioners, East Riding of Yorkshire Council and Yorkshire Forward.

[24] Assumes £49,500 cost per job

Another longer term opportunity is land assembly, to link the South Landing and Flamborough Cliffs sites with Danes Dyke, thus significantly increasing the amount of land managed for wildlife around Flamborough and hence raising its importance as a wildlife tourism destination. We return to this point later.

7.4.4 One off impacts associated with the capital investment

Current plans by YWT are to spend around £585,000 on the capital works at the three locations mentioned above. Using a construction multiplier of £250,000 per job, which is a realistic figure in today's economic climate, gives a one-off impact of 2.3 FTE posts that will be created locally. Assuming that recruitment of builders & related tradespeople and as much sourcing of materials is undertaken locally as possible, then the additional benefits to the local area can be enhanced.

7.4.5 Summary

Based on the above assessments, current proposals by YWT to invest in facilities for nature tourism along the East Yorkshire coast and inland at North Cave are likely to create a modest number of additional full-time jobs by virtue of the increase in local spending by day visitors in the main, and through the initial capital investments. However, there is much more that could be achieved and the final section of this report considers what else needs to be tackled by YWT and its partners to truly realise the potential of the sector to the Coast, Wolds, Wetlands and Waterways area of East Yorkshire.

7.5 Action plan for realising the potential of nature tourism to the area

7.5.1 Introduction

This assessment of the current position of wildlife or nature tourism within the area's tourism sector has revealed that it currently is a minority activity compared to other more established activities. However, there are certain factors that suggest there is considerable room for growth, including:

- Increasing demand for nature and wildlife tourism on a global basis
- The presence of some iconic, charismatic species at key times of the year
- A large population of visitors already in the area, who can be converted for at least part of their stay into wildlife tourists
- An established tourism sector that nonetheless has considerable capacity to accommodate additional visitors
- A desire by a number of key stakeholder agencies and organisations to push for change across the sector

As indicated earlier, unlocking this potential could more than double the contribution of wildlife tourism to East Yorkshire's economy way beyond the current level of around £9.5 million to somewhere around £28.5 million, enough to support 540 FTE jobs. Key to achieving this growth will be a suite of activities that seek to:

- Increase utilisation of existing assets by existing visitors, and raising levels of spending by these visitors
- Attract new visitors to the existing assets
- Improve and extend the range and quality of provision to meet the needs, aspirations and interests of both existing and potential visitors
- Bring in new audiences to the area through better marketing and promotion

The easiest way of breaking these development opportunities down is to consider three main areas of investment:

- Capital projects
- Marketing and promotion
- Capacity development across the area's tourism sector

7.5.2 Capital projects

It is essential, in order to raise perceptions of East Yorkshire as a valued wildlife tourism destination, that there are sufficient viewing opportunities across the area and that at least some of these are high profile, well-serviced locations. In other words, there must be a critical mass of well-developed, well-managed and well-promoted locations across the area.

Most research suggests that the main catchment area for day visits lies within a two-hour drive time. So in order to attract more overnight business from potential tourists, it is important that there are enough facilities to make it worth someone's while to travel from, for example, the Midlands, North East and North West of England.

Other than the YWT projects mentioned in Section 7.3 at **South Landing, Spurn** and **North Cave**, there are firm plans from RSPB to develop a **Seabird Centre** on their reserve at Bempton Cliffs. This will certainly raise the profile both of that part of the coastline but also of the region as a whole as a destination for viewing seabirds. Crucially, that awareness will extend well beyond the RSPB's million plus members into new audiences, providing there is sufficient investment in promoting the facility.

For comparison, the Scottish Seabird Centre at North Berwick (http://www.seabird.org) attracted some 290,000 visitors in 2009, a 4% increase on the previous year's throughput of just under 280,000. It was the tenth most visited paid-for attraction in Scotland in 2009 and attracts more than 4 times the number of visitors than the next busiest wildlife attraction in Scotland (the WDCS Wildlife Centre at Spey Bay on the shores of the Moray Firth - http://www.wdcs.org/connect/wildlife_centre/index.php). Whilst access to Bempton is slightly more difficult than access to the centre of North Berwick, this comparison does provide some guidance on what can be achieved with a good product and good marketing.

Experience suggests that there needs to be a critical mass of visitor facilities to raise a destination's profile in any niche-market, particularly when there is an aspiration to develop tourism as opposed to the day visitor market. People rarely visit more than one paid-for attraction a day, and thus to extend day visits into overnight trips will require investment in several relatively high profile wildlife tourism facilities. Moreover, there needs to be complementarity between the different facilities so that tourists are not just seeing 'more of the same'.

Thus the positioning of the YWT facilities at South Landing and Spurn Point should be very different from the Seabird Centre proposals being put forward by RSPB. The emphasis at South Landing on marine ecology and wildlife is certainly complementary, as are proposals at Spurn to focus more on migrating birds and wildfowl. In the longer term, opportunities for land assembly by YWT around Flamborough to create a larger reserve linking South Landing with Danes Dyke should be explored. This would significantly increase the amount of land along this part of the coast managed for wildlife, thus enhancing both its ecological value but also its visitor appeal.

With so many tourists staying in the resorts either side of Flamborough Head, such a development could help the area become one of the major wildlife tourism destinations in Northern England.

It is important that any developments in terms of new capital facilities at **Tophill Low** and at **North Cave** complement what it available elsewhere in Eastern Yorkshire.

As indicated previously, **North Cave** is of key importance in attracting first time visitors to the area and also novice wildlife viewers, because it is so easily accessible to the conurbations of West and South Yorkshire, the Midlands and even Lancashire. Because the birdlife at North Cave tends to lack the charismatic or rare species found elsewhere in the area, and because it is so easily accessible, it is particularly well-suited to be developed as a resource for generalists and casual wildlife viewers. Consideration should be given to the eventual provision of a permanent visitor facility incorporating an education suite similar to the facilities provided at Fairburn Ings in West Yorkshire, for example. As indicated above, North Cave has the potential to become a major gateway to the area's wildlife tourism product.

In order for these facilities to work both as 'point attractions' in their own right, but also as components of a much more ambitious and attractive wildlife tourism destination, there will need to be a minimum level of facility and service provision. Crucially, there will need to be year-round activity at the sites to ensure that tourists and day visitors are able not only to view wildlife when the wildlife is around, but also that their everyday requirements for food, drink, shopping and associated activities can also be met. Providing accessible routes around the locations is also important when seeking to attract visitors with limited mobility or other disabilities such as impaired vision.

It is useful to note the increasing trend towards the construction of iconic buildings at wildlife reserves – the contemporary design of the 2007 RSPB visitor centre at Rainham Marshes (http://www.rspb.org.uk/reserves/guide/r/rainhammarshes/about.aspx) and the proposed floating centre at for a new wetland reserve at Brockholes near Preston (http://www.building.co.uk/buildings/brockholes-floating-visitor-centre-tread-lightly/5004099.article) are cases in point.

This seems to reflect an aspiration by wildlife organisations to move beyond conventional perceptions of wildlife reserves as being spartan facilities suitable only for hard core enthusiasts. Developing such a high-profile building at North Cave would certainly make a statement about its presence as a gateway to the natural heritage of the Coast, Wolds, Wetlands and Waterways.

Other locations that are already managed by YWT for public access as well as for habitat and species conservation include **Flamborough Cliffs** and **Filey Dams**. It is suggested that these remain longer-term prospects for any major capital works on the basis that proposals at Bempton and South Landing will already create major benefits for visitors to the Flamborough area in the short term.

Within the Humber Estuary, there is certainly an opportunity to develop the Environment Agency's reserve at **Paull Holme Strays**, linking it with the re-alignment of the coastline immediately to the east. This would provide further opportunities to view the migration of species up and down the coast, and accommodate some of the growth that would otherwise put pressure on Spurn Point. It also provides a convenient wildlife viewing location for people living on the east side of Hull and in Holderness.

Further up the coast, another longer-term opportunity links to the reclamation of the **Cowden MoD** site just north of Aldbrough and the potential to link it with the existing habitats at **Lambwith Meadows.** This would create additional habitats and viewing opportunities along one of the quieter parts of the coastline, as well as the potential for more marine wildlife tourism activity in what has for a considerable period of time been out of bounds for fishermen (and hence is likely to be relatively rich in species compared to the well-fished area to the north).

Again moving north, **Hornsea Mere** already offers some bird viewing opportunities and in the longer term it too could be upgraded by the provision of enhanced viewing facilities and visitor services to provide an additional inland wildlife attraction for tourists staying in the coastal resorts as well as for day visitors from Hull, York, Scarborough and other major settlements.

Existing viewing opportunities at **Filey Brigg** should be upgraded to cater for visitors to this part of the coast. It offers stunning views down Filey Bay towards the cliffs at Bempton, and a key function of the orientation at Filey Brigg should be to encourage visitors to make the short trip down the coast to visit the facilities at Flamborough Head, Bempton and South Landing.

Moving north again, there is the potential in the coming years to create a major new wetland reserve at **Flixton Carr** and **Cayton Carr**. This location is rich in archaeology as well, offering an opportunity to develop a multi-functional visitor centre that celebrates both the early history of the area as well as its current value for wildlife. For the last few years efforts have been made to increase the area's value for birdlife in particular (see www.caytonflixtoncarrs.org.uk) though voluntary agreements with farmers, and additional investment in conservation could significantly increase the impact of the work and hence raise its profile as a wildlife viewing destination. A key market for this location would be the population of Scarborough and of course those tourists staying in and around the town and in the resorts to the south.

Finally, it has been suggested that **Withernsea** may soon be positioned as the 'Gateway to Spurn', a proposal that is somewhat strange given that Withernsea would surely be better be promoted as a destination in its own right. Certainly from a wildlife or nature tourism perspective, such a move would offer little to commend it as it would divert attention, activity and spending away from the few businesses at Spurn that would benefit from it.

In addition to the main point facilities mentioned below, it is also desirable to develop a suite of **secondary locations** including some of those mentioned above, where there is some basic visitor provision in terms of parking, cycle racks, exterior interpretation and orientation, and which can be used as well for additional activities such as guided walks etc. These will be targeted more at local residents and day visitors, rather than the overnight market.

One final product development opportunity would be the provision of **a trip boat** on one of the navigable inland waterways, and its promotion for wildlife viewing trips on a year-round basis. Again, this can be promoted both to local residents and day visitors but also to holidaymakers staying around the area.

In terms of a checklist of facilities and services to be provided across the CWWW area then the following proposals presented in Table 19 should be considered by YWT, RSPB, Yorkshire Water and other partners. It is taken as read that all facilities will offer parking, toilets, basic catering, retail and interpretation.

Table 19: Checklist for facility provision at key 'point' locations

	Short-term opportunities					Longer-term developments				
Facility	**Spurn Point**	**South Landing**	**Tophill Low**	**Bempton Cliffs**	**North Cave**	**Paull Holme Strays**	**Cowden MOD site**	**Hornsea Mere**	**Filey Point**	**Flixton, Cayton Carrs**
Iconic structure				✓	✓			✓		✓
Adaptive re-use of existing buildings	✓	✓	✓				✓			
Interior interpretation, orientation	✓	✓	✓	✓	✓		✓	✓		✓
Education facilities	✓		✓	✓	✓					✓
Main orientation facility for other key sites around Eastern Yorkshire					✓					
Interpretation focuses on seabirds				✓		✓			✓	
Interpretation focuses on wildfowl			✓							✓
Interpretation on woodland birds			✓							
Interpretation focuses on wildfowl,					✓			✓		
Interpretation for migratory species	✓					✓	✓	✓	✓	
Interpretation on marine wildlife		✓								
Year-round catering, retail	✓		✓	✓	✓			✓		
Accessible route around reserve	✓		✓	✓	✓			✓		✓
Guided walk programme	✓	✓	✓	✓	✓	✓		✓	✓	✓
Events programme	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Overnight accommodation for special interest groups	✓									
Land acquisition		✓		✓		✓	✓			✓

7.5.3 Marketing and Promotion

In recent years there has been a radical change in destination marketing with more and more information being communicated through the internet, backed up with print and other media where appropriate. Whilst the area's destination marketing organisation VHEY does promote some of the area's wildlife interest through its consumer facing website http://www.realyorkshire.co.uk, there is no real sense that the area has some unique nature tourism opportunities that are worthy of a visit. Similarly, the Welcome to Yorkshire site http://www.yorkshire.com also identifies some opportunity but it is hidden away and difficult to source. YWT and RSPB websites are focused more on reserves and provide factual information (updated much more frequently it appears than the tourism sites) but have few if any links into the broader tourism community.

What this demonstrates is the lack of packaging of the wildlife and nature tourism product for both existing and potential visitors. With the exception of two tour companies offering a stop-off in eastern Yorkshire as part of a longer birding holiday in the North of England, and the work of both YWT and RSPB in putting on boat-based bird-watching trips a few times a year off Flamborough/ Bempton, there is very little active promotion of the area's wildlife tourism product.

Key opportunities would appear to be:

- Working with VisitYorkshire and VHEY to agree a **brand identity** for the area to be used in destination marketing to this segment – suggestions include '*The Puffin Coast'* or '*The Gannet Coast'.* Scarborough has already had some success with the 'Dinosaur Coast', using this as a theme to guide the layout and interpretation in the recently refurbished Rotunda Museum. Adopting a similar strategy could raise awareness of this particular strength of eastern Yorkshire's tourism product offer, particularly if it could be promoted through one of the BBC's popular countryside programmes such as *Springwatch* or *Countryfile*
- Creation of a single **website** promoting the area's nature tourism product, including:
    - Overview of the area's rich natural and wildlife tourism assets
    - links to the websites of all reserve and site managers and of specialist wildlife guides working in the area
    - blogs
    - news feeds (just seen etc)
    - list of events
    - webcams onto key locations (e.g. nesting sites, feeding stations)
    - weather forecasts
    - links to local accommodation providers known to cater for wildlife tourists
    - links to key travel sites
    - Downloadables should include species lists, travel directions, site or reserve plans, identification guides to key species
- Strengthening and co-ordination by all key stakeholders of an **events programme** designed around three market segments:

  - Local residents and people living within easy travel time of the CWWW area – events such as regular guided walks (including night-time bat walks, for instance) and talks themed around the seasons. These to be promoted through membership groups, local press, radio, TV as well as through word of mouth. One outcome will hopefully be an increase in the number of people living or working locally who have the skills and knowledge to lead guided walks or to present talks
  - Tourists already on holiday in the area – in particular, partnerships could be developed with the larger holiday parks on the coast with YWT, RSPB and others offering tailor-made events for guests. A particular emphasis here would be on raising awareness of holiday-home owners and guests of what is available, and converting a limited interest into a more casual interest
  - Major events designed to bring in overnight tourists as well as day visitors. These will be larger and linked to key events in the wildlife year such as the arrival of the Puffins at Bempton or the first signs of the migrating birds at Spurn

- Preparation and publication of **wildlife guides** for other outdoor recreational resources in the area such as the Wolds Way, Bridlington Bay, the Driffield Navigation, the Burton Constable Estate, the Humber Estuary or even the River Hull corridor. The aim here will be to raise awareness of wildlife issues amongst visitors and tourists in the area for other purposes. Creating saleable items will also help to increase levels of spending by wildlife tourists in the area

- Piloting a '***Wildlife Friendly'* membership scheme** for local accommodation providers across the CWWW area. Such an initiative would allow interested businesses to develop their own understanding of this market and to help YWT and others strengthen the overall product offer

  A similar scheme – Bird Friendly Hotels - already operates in some parts of the world, run by Birdlife International and focusing on resorts and larger accommodation businesses. The intention here would be to extend the reach of the scheme to people interested in other forms of wildlife and for it to be as much about the service as it is about the product. So accommodation establishments belonging to the scheme would not only have an extensive set of field guides and binoculars for loan, but would also have contact details for all relevant sites and local guides and at least one staff member with sufficient product knowledge to be able to help novice guests in particular decide what to do and where to go on a particular day for the best wildlife experience. Work would also be carried out in the grounds of hotels, B&Bs, campsites etc to make them more wildlife-friendly.

  Should such a scheme take off, individual accommodation businesses could then follow the lead of competitors such as the Grant Arms Hotel (www.grantarmshotel.com) on Speyside which offers a range of wildlife (and other) themed packages to guests. With a number of establishments participating in the scheme, one would then have the critical mass of accommodation <u>and</u> sites to be able to promote the area as a high quality destination at consumer shows such as the annual Rutland Water Bird Fair. An early starting point would be to work with those establishments already used by special interest tour groups coming to Bempton in the spring (see page 17 of this report).

7.5.4 Capacity building

The final area where investment is needed is in capacity building across the tourism sector in general. The aim would be to recruit a cohort of '**Yorkshire Wildlife Champions**'. In particular, this could cover:

- Awareness raising of the existing and forthcoming products amongst the area's many tourist accommodation providers. Holding a special **'fam trip' for Bridlington, Scarborough, and Filey's guest house operators** for instance, taking them to Bempton and Flamborough Head and possibly out on a short boat trip, would not only get the project good PR in its own right, but would also allow them to talk more knowledgably to their guests about what is on offer. A similar initiative for staff from cafes and restaurants in the main resorts but also at the main motorway service stations on routes serving the area could create similar benefits, particularly if supported by leaflets advertising the key locations
- Developing basic **wildlife identification courses for holiday camp staff** so that they can develop their own initiatives for guests
- **Extending existing partnerships between local boat owners** (pleasure craft and inshore fishing boats)and YWT, RSPB to encourage more independent boat-based bird watching trips
- **Wildlife-based art or story-writing competitions for local schoolchildren** run in partnership with local teachers, to raise teacher's awareness of the opportunities for educational trips. The outputs of these competitions can be used to prepare a **'Children's Guide to Yorkshire Wildlife'** which can then be offered to relevant family holiday accommodation providers for promotion through sites such as www.mumsnet.com and other similar, family-oriented sites

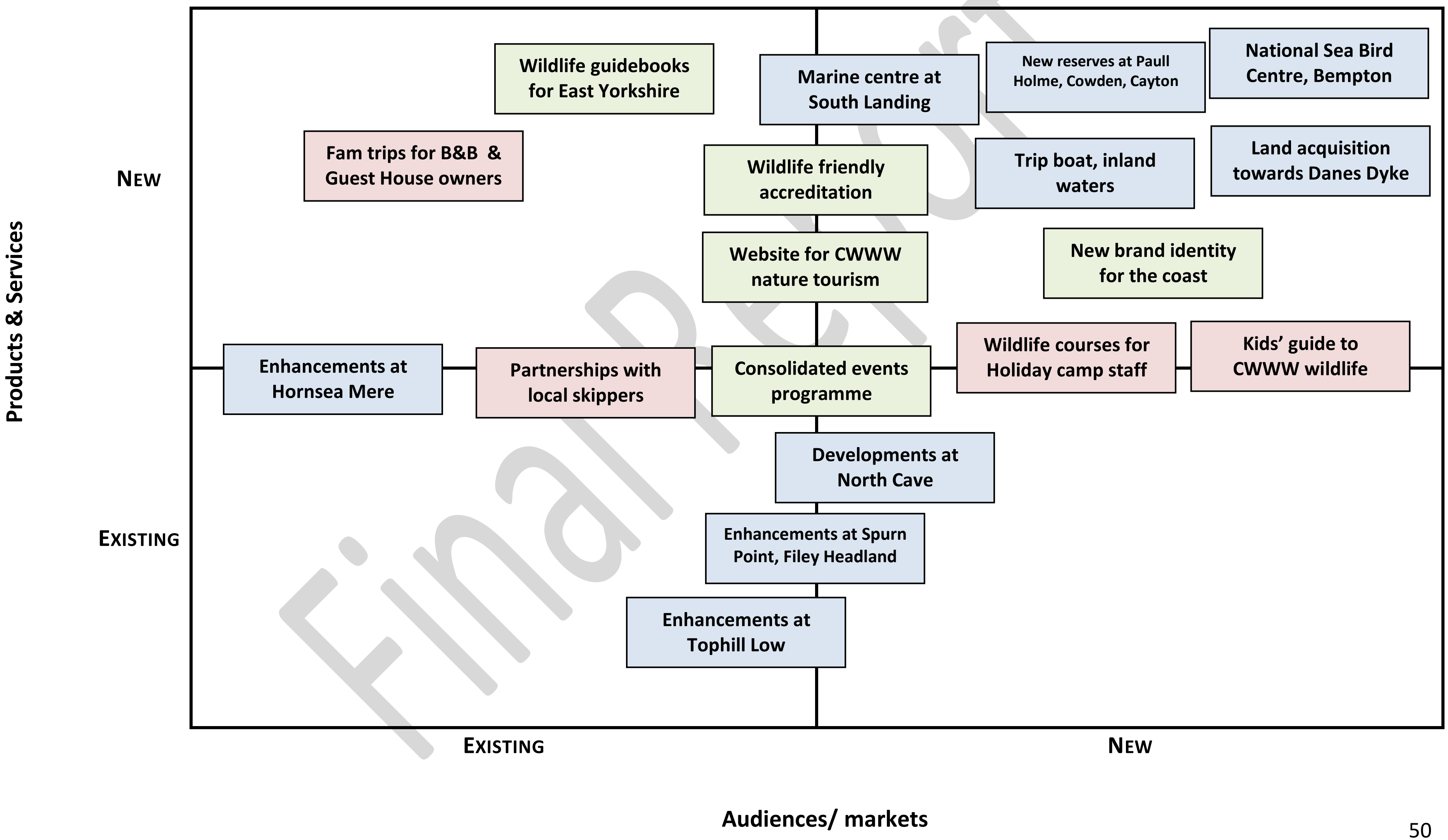
7.5.5 Summary

The recommendations for action presented above should achieve a number of objectives:

- Enhancing the wildlife viewing opportunities across the CWWW area
- Raising awareness of, interest in and engagement with these opportunities by a range of target markets
- Increasing opportunities across the tourism sector for staff and others to become more engaged with this sector

The figure overleaf seeks to place these opportunities within a well-used business planning model called 'Ansoff's matrix', with the intention of demonstrating how the various investment proposals put forward here will blend together within the context of stimulating a major uplift in the contribution of wildlife and nature tourism to eastern Yorkshire's economy. In general, the further to the right and the closer to the top of the grid, the riskier but also potentially the more rewarding is the investment proposal. The aspiration is that by increasing levels of spend and extending the length of stay of existing visitors (including converting day visitors into overnight tourists) and by attracting new markets to the area, the total economic impact of wildlife and nature tourism can be significantly increased.

Figure 5 : Consolidation of actions into Ansoff's Matrix



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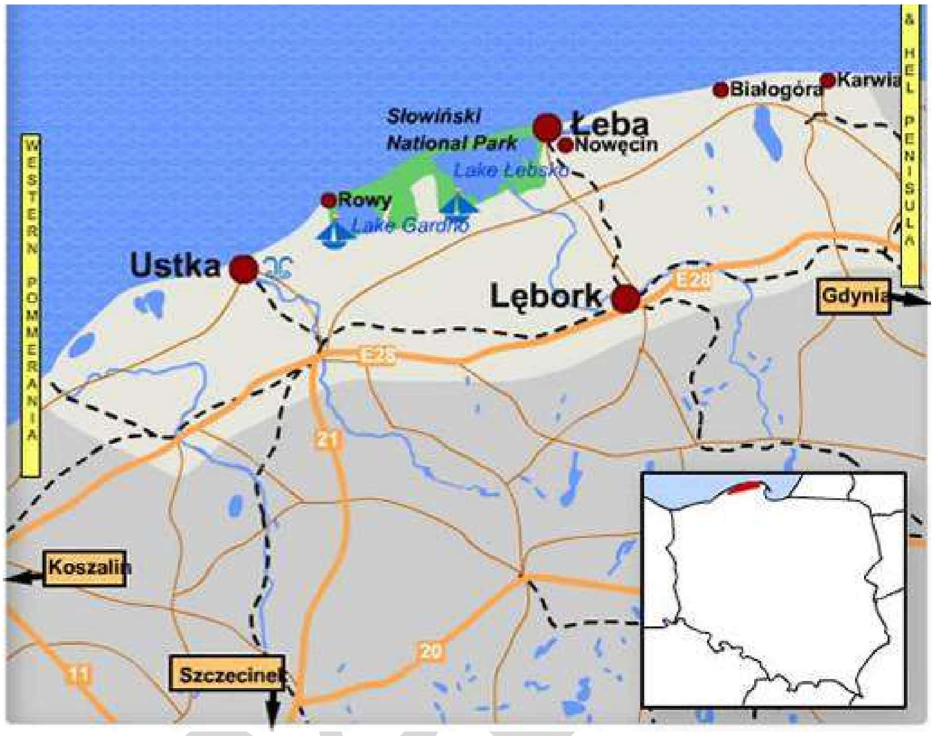
CASE STUDY: SLOWINSKI NATIONAL PARK



Slowinksi National Park, a UNESCO Biosphere Reserve and RAMSAR site, is situated on Poland's Baltic coast, some 150 km west of Gdansk. The Park is relatively small covering 186 km^2 of which around 60% is water and 40% of which is forest and agricultural land. The landscape is varied and includes a sand spit with moving dunes, three brackish inland lakes (Lebsko – at 7,140 ha the third largest in Poland; Gardno – 2,470 ha and Dolgie Duze – 156 ha), coniferous woodland, agricultural land (mainly grazing), abandoned military installations and a number of small villages. The highest point in the Park (Rowokil) is some 115 m above sea level. There are no endemic flora or fauna.

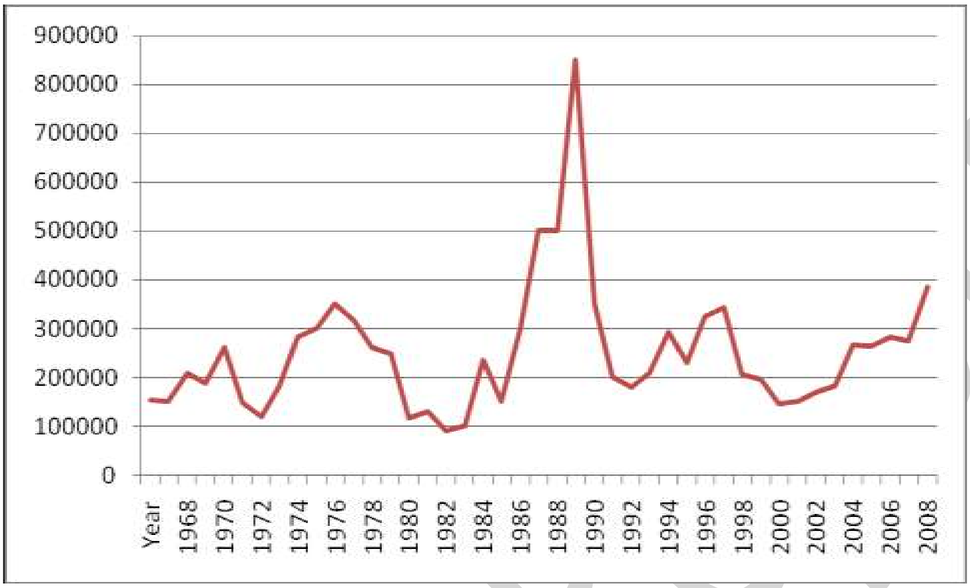
Management of the Park is the responsibility of a Park Authority that receives state aid and which is forbidden under Polish Law from running profit-making enterprises. The authority runs a small museum and information centre in the main settlement of Smoldzino. The authority is able to levy an entrance charge to the Park but implementation of this is constrained by the fact that public access to the beaches is free, hence the majority of people experiencing the Park actually pay no charge at all.

Ornithologists have identified 261 different species in Slowinski National Park, 184 resident and 77 migratory species. The Park is home to several pairs of White Tailed Eagles (the national bird of Poland) and to one pair of Golden Eagles. Red Kite nest locally and Black Kite are occasional visitors. Seven species of woodpeckers nest in the Park. The more westerly water area, Lake Gardno, is an important resource for over-wintering waterfowl and duck including Smew, Common and Velvet Scoters, Long Tailed Ducks, Wigeon, Shoveler, Gadwall, Pintails and Red Breasted Mergansers. In spring and summer a number of pairs of (red legged) storks nest in and around the Park's villages, whilst in autumn up to 7,000 Crane (*Grus Grus*) spend some time around Zarnowska on the eastern fringes of the Park before heading south to winter in the Mediterranean. Thus, there is ornithological interest in the area at almost every time of the year.

Beavers were re-introduced to the Park in 1996 and the population has thrived to the extent that there are now considered too many, and they are creating problems with the area's drainage networks. Other than badgers, there are no other large mammals.

Figure 1 provides total visitor numbers to the park for the last three decades or so, based on ticket sales between 1st May and 30th September from four information/education points. The recent trend of an increase in visitors reflects the growing prosperity in Poland and the Slowinski area's emergence as a popular tourist destination. Advice from the Park authority is that the peak in visitation in the late 1980s will partly be due to the new freedoms to travel being experienced in Poland at that time.

Figure 1: Visitor numbers to Slowinksi National Park, 1978 – 2009



Source: Slowinski National Parl

The main tourism activity revolves around the sand dunes and beaches and is concentrated in the summer months from May to the end of September. There is also a very pronounced imbalance in visitor pressures around the Park, with the eastern area around Leba receiving some 300,000 visits per annum compared to 60,000 in the central park (accessed through Smoldzino) and 20,000 in the west around Rowy.

There is very limited public interest in the Park's rich ornithological heritage at present despite some limited investment in bird hides and an interpretive trail around Lake Gardno. There is some limited cycle tourism based around a small agrotourism sector. Some 15 observation towers (Plate 1) have been provided around the Park to offer views of the landscape – in some cases, access to the tower costs 3 zloty (around 65 pence) whilst others are free to climb. The other main tourist product is a 30 km network of interpreted trails and a further 140 km of footpaths, the majority of which are well signed. As well as the main museum in Smoldzino there are four other small museums around the Park. Usage numbers are not available for these facilities.

Plate 1: Observation Tower under construction, Kluki, Slowinski National Park

Promotion of the area focuses on the coastline and beaches and is aimed firmly at the recreational market – anecdotal evidence from the Park Authority is that the majority of visitors go to sunbathe, drink and picnic. There is some limited interest and participation in watersports on Lakes Lebsko and Gardno. The bulk of visitors are domestic holiday-makers, with some Dutch and German tourists passing through either on cycling or caravanning holidays.

Discussions with representatives of the Park Authority gave rise to the impression that nature conservation interests override anything else. There is only one employee charged with developing tourism around the Park compared to more than 20 conservationists. This is a poor, rural area of Poland and there is limited interest from local farmers to consider moving into tourism although some EU funding is being used to develop agro-tourism (i.e. farm-based) activities. Under Polish Law it is very difficult for the authority to enter into partnerships with local tourism operators and there appears to be no culture of informal partnership either between the conservation and tourism lobbies. Certainly suggestions that they might like to look at how to develop public interest in the area's birdlife in off-peak periods was met with considerable reluctance to engage in debate – as far as the conservationists are concerned, people scare birds and therefore should not be allowed anywhere near the over- wintering and migrating flocks.

The good practice example drawn from this initial case study is the provision of outlook towers on low lying land, to provide visitors with a view over the area. Given the constraints of providing public access to the lighthouse at Spurn Point in particular, this is an opportunity that could be investigated by YWT and its partners.

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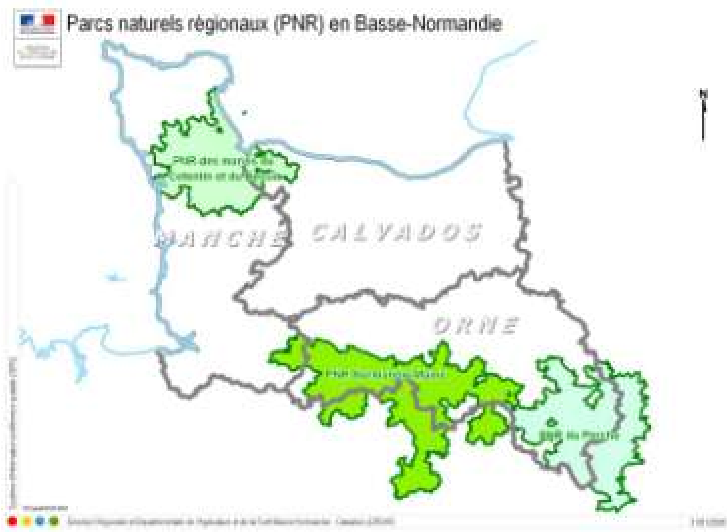
Case Study: Parc Naturel Régional des Marais du Cotentin et du Bessin



The Parc Naturel Régional des Marais du Cotentin et du Bessin is located on the Cotentin peninsula in Normandy, a few km south of Cherbourg. The park was created 1991 with an area of 148,000ha, of which 30,000ha are wetlands that flood in winter. The park contains 154 communities, from hamlets to villages and market towns including Carentan, Isigny-sur-mer and St Mere-Eglise. Finance is obtained largely from the Regional (Basse Normandie) and Departmental (Manche and Calvados) governments, with a 1 euro per inhabitant levy on the 154 communes (72,500 population).

The park ‘s overall appearance shows what can be achieved in a 20 year time frame with a relatively small regionally administered budget (£1.5m p.a.) and the co-operation of the communities that make up the protected region. It is effectively our Living Landscape in operation.

The park’s attractions have been poorly known about and little visited in the past, in contrast to the hundreds of thousands of tourists who visit the invasion beaches that abut the park’s boundaries

The management plan takes a holistic, sustainable approach, based on the European Charter for Sustainable Tourism (CETD) which, while it has proved somewhat onerous and non-visitor focused, has proved to be a useful structure around which to set priorities and ensure an inclusive approach to the development of the park.

There are two (wetland and mud/saltmarsh) nature reserves in the park, managed at the national level. The park has achieved national recognition for its innovative approach and technical know-how in wetlands management

The small technical team includes a tourism officer and an economic specialist, led by a Technical manager whose responsibilities include environmental impacts, education and international links. There are no reserve managers as such, but a small team at the Park Centre (Maison du Parc) carries out some local works.

The strategy is set out in a 12 year plan, with common objectives for elected politicians and park managers, with 4 policy “axes” incorporating environmental, social and cultural issues:

- To manage and preserve biodiversity and water resources for future generations
- To maintain and improve the attractiveness of the “Marais” way of life

- To use the environment as an asset for economic development. (Issue: to ascertain the value of heritage and cultural assets (e.g. mud/cob buildings)
- To encourage participation in the regional park, enabling people to participate in the project and to open it up to others

The park's land management policy is delivered through the communes and farming industry through and close liaison with the IDBs and the water agency (still nationalised in France). Control of some of the wetlands comes under the communes' ownership, and decisions on drainage, grazing seasonality, intensity and haycutting can often be agreed without difficulty

Nature tourism strategy is more advanced with a dedicated website for accommodation, a network of nationally marketed Gites (self catering, often in traditional buildings) and Gites Panda (endorsed by WWF as contributing quality natural surroundings, management that contributes to environmental protection and quality of service). The various species that can be seen near each gite are highlighted in the information provided.

Without a network of strong voluntary bodies like the Wildlife Trusts, National Trust and RSPB, France relies to a great extent on the regional natural parks to look after the heritage aspects of the countryside, and in the Marias du Cotentin that means mud (or cob) buildings. A large exhibition in the Maison du Parc (park centre – see Plate 2) looks at techniques and conservation, and comparisons of mud or rammed earth structures around the world.

The park centre is particularly impressive, with a recently extended complex containing very high quality interpretation adjoining some superb wetland habitats.

The Maison du Parc explains the opportunities and challenges of managing wetlands and saltmarsh extremely well.

Plate 2: Maison du Parc, near Carentin

It acts as a welcoming front door to the attractions of the area, explaining what can be seen in an overtly pastoral landscape e.g. storks, seals, amphibians, as well as the built heritage of the landscape and the culture and traditions of the inhabitants (via video clips on screens in wickerwork stands). There is a good shop at the Maison du Parc with items for kids as well as serious naturalists, but no catering on site – this is done on the other side of the bridge in a traditional restaurant and bar that seemed well patronised.