

BOWLES GREEN LTD



# Kielder Wildlife Tourism Study

***Consultants' Report***

**January 2010**

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## Steering Group

The steering group for the project was as follows:

- Neville Geddes, Forestry Commission
- David Hall, Northumbrian Water
- Mike Pratt, Northumberland Wildlife Trust
- Elisabeth Rowark, Kielder Partnership

## Acknowledgements

The consultants would like to thank the steering group for their guidance and comments of interim and draft documents and all of the consultees who contributed their time and expertise towards the study.

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## EXECUTIVE SUMMARY

Kielder Water & Forest Park comprises the largest man-made forest (600+ kms<sup>2</sup>) and the largest man-made lake (11+ kms<sup>2</sup>) in northern Europe. At the same time, it is a working forest (producing 25% of England's timber), its habitats and species are protected under UK and European legislation and it is enjoyed by visitors, who come to take part in a range of activities.

Research shows that visitors see Kielder Water & Forest Park (KWFP) as a place to enjoy wildlife and the outdoors. Members of the Kielder Partnership commissioned this study to explore the opportunity of creating a step change in the provision of wildlife events and activities, and in the number of people enjoying them, whilst ensuring the long-term sustainability of the wildlife resources.

The work consisted of the following stages:

1. Briefing Meeting – for a briefing on the work and to agree milestones, deadlines, etc
2. Research and Consultation – Consultation with stakeholders and tourism businesses and a review of wildlife at Kielder, demand for wildlife tourism at Kielder, the strategic and funding context and experience from elsewhere
3. Analysis – of the research and consultation findings in order to formulate draft recommendations which were tested with the Steering Group and the Big Picture partners
4. Recommendations – including a delivery plan for wildlife tourism at Kielder
5. Reporting – draft and final reports

### Wildlife Watching at Kielder Now

The landscape is wild and threatening to many visitors. It lacks the interesting diversity of competing destinations but it undoubtedly has a wild beauty that can be appreciated in all weathers. An advantage of the scale of Kielder with its wooded landscape is that it is able to welcome large numbers of visitors without negative impacts on nature conservation and without appearing busy or crowded.

A variety of habitats are present at Kielder, but because of the current land-use, they are widely dispersed. In addition, most of the habitats are poor in nutrients, which means that they support small numbers of specialised species, rather than large numbers of plants and animals that would constitute a wildlife spectacle; these include red squirrel, roe deer, badger, otter, bats osprey, goshawk, merlin, hen harrier, crossbill, woodland birds, pearl mussel, salmon, orchid, sundew, meadow flowers, trees, fungi and lichens. The birds and animals are easiest to see early or late in the day.

Other aspects of nature that could be promoted are dark skies (the darkest in England) and tranquillity.

There are already opportunities to enjoy wildlife at Kielder, but these are very limited at present; they include: guided walks and events promoted as 'Wild About Kielder', three hides, remote viewing (of ospreys and red squirrels), the Kielder Observatory with associated events, CCTV and other viewing opportunities at Whitelee Cottages. In addition, the Northumberland National Park interprets nature at a number of sites surrounding the Kielder Water and Forest Park.

A wildlife calendar for Kielder was developed, as follows:

Species	J	F	M	A	M	J	J	A	S	O	N	D
Displaying raptors												
Osprey												
Bats												
Roe deer												
Orchids												
Meadow flowers												
Autumn leaves												
Fungi												
Red squirrels												
Badgers												

Some improvements are already planned (including to osprey and squirrel watching) and a number of potential improvements were identified, as follows:

- Improve facilities and create more opportunities for watching red squirrels
- Improve facilities for viewing flora (meadows, mires and orchids)
- Manage the shoreline at Bakethin more positively for wildlife
- Create a circular, self-guided nature trail at Bakethin
- Create self-guided nature trails in the wooded valleys
- Construct an artificial badger hide in a manageable location populated with RSPCA rescue badgers
- Construct a tree top walk/canopy walkway
- Construct a bird hide with one way glass and feeders
- Increase the capacity of the existing wildlife events/guided walks programme
- Run regular wildlife safaris
- Install webcams to relay images back to a single point
- Run night time tours for sky and forest sounds
- Incorporate wildlife watching opportunities into delivery of the Investment Plan, especially at the three main visitor hubs – Tower Knowe, Leaplish and Kielder Castle
- Upper North Tyne Valley is a contrasting landscape which could be part of a package

### Demand for Wildlife Watching

It is estimated that approximately 400,000 staying trips and 3,100,000 day trips in North East England each year have 'enjoying nature study' as an activity on the trip. Nature tourism displays the characteristics of all niche markets, with a small number of very committed participants and larger numbers of less committed people.

A segment called 'eco-awares' are identified as the most attractive target market; these are people who have a casual interest in the natural environment and who are likely to want to enjoy the countryside and learn about wildlife, habitats and landscapes as part of a more general holiday or day trip. They are also likely to spend in local shops, restaurants and at other attractions. They tend to fall into the 'discoverers', 'traditionals' and 'cosmopolitans' ArkLeisure segments – also important existing and target markets for Kielder.

### Strategic Context & Best Practice

Wildlife tourism fits well with a wide range of regional and sub-regional policies and developing facilities for wildlife tourism is likely to be eligible for a number of funding programmes. Wildlife and nature watching takes place throughout the UK and overseas. The study identified a number of examples of best practice for species present at Kielder.

## Analysis

Research suggests that demand for wildlife and nature tourism is strong in the North East Region and nature tourism demand appears to be growing nationally. Demand is strongest for 'real' wildlife experiences and is strong for rare and common species. Accommodation providers in the Kielder area report demand for their guests for wildlife watching and tour operator Northern Experience Wildlife Tours has demonstrated demand for personally guided tours.

The chief constraint to wildlife tourism in North East England, and at Kielder, appears to be a lack of good quality interpretation and product. Currently, provision for wildlife watching at Kielder is, in the main, of a poor quality and limited capacity.

Strengths, weaknesses, opportunities and threats to wildlife tourism at Kielder can be summarised as follows:

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>▪ Robust landscape</li> <li>▪ Stakeholder land ownership</li> <li>▪ Stakeholder expertise and knowledge</li> <li>▪ The Big Picture and Kielder is a key regional development project</li> <li>▪ Year-round wildlife calendar</li> <li>▪ Number of interesting species present, including red squirrels, osprey, bats, deer, badgers, otters</li> <li>▪ Darkest skies in England</li> <li>▪ Sense of tranquillity</li> </ul>	<ul style="list-style-type: none"> <li>▪ Vegetation dominated by coniferous forest</li> <li>▪ Low nutrient and food levels generally, which support only small populations of plants, birds and animals</li> <li>▪ Many of the interesting species present are hard to watch (deer, bats, otter, etc)</li> <li>▪ Osprey nest distant from watch point</li> <li>▪ Distance from areas of high population</li> <li>▪ Stakeholder lack of resources to develop and manage nature watching</li> <li>▪ Midges</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>▪ Demand from eco-awares</li> <li>▪ Emerging regional nature tourism action plan</li> <li>▪ Wildlife tour operator interested in expanding current activity</li> <li>▪ Commercial nature watching models</li> <li>▪ Accommodation providers keen to promote wildlife tourism</li> <li>▪ Policy support for wildlife tourism</li> </ul>	<ul style="list-style-type: none"> <li>▪ Failure to invest</li> <li>▪ Grey squirrels out-competing reds</li> <li>▪ Osprey might not return</li> <li>▪ Disturbance of wildlife by visitors</li> </ul>

## Recommendations

There is potential to increase additional visitors to Kielder for wildlife watching and a strategy is proposed with five general themes, as follows:

- The Wildlife Tourism Delivery Plan should be integrated into the KWFP Investment Plan and other existing management plans. Every opportunity should be taken to incorporate management for wildlife and wildlife watching opportunities when delivering Investment plan and other actions
- In order to maximise capacity and economic benefit, where possible, wildlife experiences should be provided by the commercial sector
- Wildlife tourism at Kielder should focus on showing people when and where they can enjoy wildlife – it should do this by offering a menu of guided and self guided experiences
- Wildlife tourism at Kielder should focus on providing face to face opportunities to enjoy wildlife; webcams/CCTV should be used to support these 'real experiences'
- Provision and marketing should use the Kielder Wildlife Calendar as a basis and it should be delivered - at least initially - in spring, autumn and winter when midges are less troublesome

An action plan is recommended consisting of the following tasks:

### *Land Management for Bio-diversity/Nature Conservation*

- LM1: Continue to control grey squirrels and the deer population
- LM2: Manage Bakethin for nature conservation
- LM3: Manage the wooded burn valleys for nature conservation
- LM4: Incorporate wildlife into a new landscape design plan for Leaplish
- LM5: Manage the upland mires for nature conservation
- LM6: Continue to monitor breeding birds and manage accordingly

### *Develop a Range of High Quality Wildlife Watching Experiences*

- WE1: Develop Kielder Castle as the focus for wildlife
- WE2: Develop half day wildlife safaris
- WE3: Develop daytime and evening wildlife experiences
- WE4: Develop self guided trails in the wooded burn valleys
- WE5: Formalise viewing of meadow flowers downstream of Falstone
- WE6: Improve access and interpretation at Bakethin
- WE7: Develop new wildlife hides
- WE8: Investigate the potential for a new managed badger watching site
- WE9: Develop a programme of events to reflect the wildlife calendar
- WE10: Make rangers' knowledge available to the private sector and licence private sector operators
- WE11: Support Kielder Observatory and Astronomical Society in developing and promoting events and products for non-specialists

### *Marketing and Promotion*

- MP1: Incorporate wildlife tourism marketing into a KWFP marketing strategy
- MP2: Deliver an annual wildlife tourism marketing campaign
- MP3: Promote the Kielder Wildlife Calendar
- MP4: Promote red squirrels as the 'anchor' experience
- MP5: Establish a booking system for tours and events, promoted through information centres and accommodation providers

### *Develop Partnerships*

- DP1: Conservation management partnership
- DP2: Delivery partnerships for each watching proposal
- DP3: Nature tourism marketing group

### **Costs and Impacts**

Expenditure in the region of £250,000 is identified. It is felt that much of this can be found by incorporating wildlife watching into existing proposals in the Kielder Investment Plan. Additional funding can be found from the RDPE and other sources.

The existing value of wildlife tourism at Kielder is estimated to be in the region of £450,000 per annum. Delivering the above recommendations would generate estimated additional spending between £545,000 and £794,000 per annum.

### **Delivery**

In order to implement the project, it is recommended that a Wildlife Tourism officer is appointed on a short term fixed contract. This officer, to be managed by the Kielder partnership, would work with landowners, wildlife tour operators and accommodation providers to deliver the recommended tasks.

## **1 INTRODUCTION**

### **Background**

- 1.1 Kielder Water & Forest Park comprises the largest man-made forest (600+ kms<sup>2</sup>) and the largest man-made lake (11+ kms<sup>2</sup>) in northern Europe. At the same time, it is a working forest (producing 25% of England's timber), its habitats and species are protected under UK and European legislation and it is enjoyed by visitors, who come to take part in a range of activities.
- 1.2 Since 1994 the Kielder Partnership has been working to develop the area as an inspirational place for leisure, exploration, enjoyment and fun. It is currently delivering 'The Big Picture', a ten year development plan which aims to form the currently dispersed variety of attractions at Kielder into an integrated visitor destination.
- 1.3 Visitors see Kielder Water & Forest Park (KWFP) as a place to enjoy wildlife and the outdoors. Members of the Partnership and the Northumberland Wildlife Trust have provided an increasing number of wildlife events for visitors though, to date, these are not coordinated, and they are mostly promoted to and attended by local people and people already visiting the area.
- 1.4 Around 300 people attend the existing wildlife events each year, but the Winter Wonderland event demonstrates that large numbers of people (5,500 children plus accompanying adults in November/December 2008) can be attracted to Kielder for well-organised and well-promoted events.

### **The Brief**

- 1.5 The Partnership now wishes to review wildlife tourism in the Park, to explore the opportunity of creating a step change in the provision of wildlife events and activities and in the number of people enjoying them, whilst ensuring the long term sustainability of the wildlife resource.

### *Aim*

- 1.6 The aim of this study is to:
- Demonstrate the potential to develop wildlife tourism in the Kielder Water & Forest Park
  - Formulate a plan to develop this area of the tourism economy

### *Objectives*

- 1.7 The objectives of the project are as follows:
1. To demonstrate the potential to develop wildlife tourism in Kielder Water & Forest Park by:
    - Reviewing existing delivery
    - Identifying potential products and markets
    - Identifying the potential economic value of wildlife tourism to the Kielder Partnership and the wider North East regional economy

2. To propose a plan for the Kielder Partnership to develop wildlife tourism taking account of:
  - Existing and future resource potential
  - Potential for partnership working
  - Entrepreneurial investment opportunities

#### *Geographical Scope*

- 1.8 The study focussed on the Kielder Water and Forest Park (KWFP), though the consultants were asked to take account of how wildlife tourism in KWFP relates to wildlife or nature-based tourism in the wider area.

#### *Wildlife Tourism*

- 1.9 At the briefing meeting it was agreed that the consultants should consider the wider aspects of nature, in line with the definition of nature-based tourism used in the 'North East England Nature-based Tourism Scoping Study', as follows:

*'day and staying trips where the main purpose of part of the trip involves watching or appreciating the wildlife, landscape, geology, flora or fauna'.*

#### **Methodology**

- 1.10 Five stages of work were undertaken, as follows:
  1. Briefing Meeting – for a briefing on the work and to agree milestones, deadlines, etc
  2. Research and Consultation – Consultation with stakeholders and tourism businesses and a review of wildlife at Kielder, demand for wildlife tourism at Kielder, the strategic and funding context and experience from elsewhere
  3. Analysis – of the research and consultation findings in order to formulate draft recommendations which were tested with the Steering Group and the Big Picture partners
  4. Recommendations – including a delivery plan for wildlife tourism at Kielder
  5. Reporting – draft and final reports



## 2 PRODUCT AUDIT

- 2.1 This section summarises and makes a critical assessment of nature at Kielder and the existing opportunities for people to enjoy it.

### *Kielder as a Wildlife Destination*

- 2.2 Kielder is a relatively harsh, upland landscape which, in the recent past, has been managed for the production of timber, supply of water and for grouse shooting. Whilst the Forestry Commission and Northumbrian Water have been providing for recreation since the early 1980s, the scale of investment in facilities for recreation has increased significantly with the advent of the Kielder Partnership (KP). The result is a very large body of water, extensive forest cover, mostly spruce and pine, interspersed with grassland and moorland.
- 2.3 The main vehicular access is by the C200 from the south east. The Lakeside Way, a 26-mile multi-user off-road route provides access to the whole of the lakeshore and a number of art installations have been located along it. In addition there is a network of footpaths and mountain biking routes and a passenger boat, 'Osprey', operates on Kielder Water.

- 2.4 Visitor facilities include:

### *Main Visitor Zones*

- Tower Knowe visitor centre – orientation
- Leaplish – information, birds of prey centre, pub (with CCTV footage of red squirrels), self catering cabins, indoor swimming pool and gym, conference/meetings centre, boating facilities, trails, wildlife garden
- Kielder Castle area – café, exhibition (including interpretation of red squirrels and raptors), mountain bike hire, playground, maze, salmon hatchery, youth hostel
- High moors – Kielder Observatory, Skywatch area, mountain bike trails
- Calvert Trust – accommodation and facilities for people with disabilities
- Hawkthirst – scout camp with indoor activity facilities
- Forest road – open seasonally between Kielder Castle and Redesdale

### *Other Visitor Zones*

- Bull Crag – car park and trails
- Mounces – car park and viewpoints (opens seasonally for osprey viewing, toilets closed/semi derelict)
- Mathews Linn – car park, toilets, moorings, trails
- Bakethin Weir – vey small car park
- Bakethin – car park, trails

### **Description of the Wildlife**

- 2.5 The nature that people can enjoy at Kielder is described here taking account of the landscape, habitats, species, the dark skies and other aspects of enjoying nature.

### *Landscape*

- 2.6 The landscape is wild and threatening to many visitors. It lacks the interesting diversity of competing destinations (the Lake District, the Northumberland Coast, the Yorkshire Dales) but it undoubtedly has a wild beauty that can be appreciated in all weathers.

- 2.7 An advantage of the scale of Kielder with its wooded landscape is that it is able to welcome large numbers of visitors without negative impacts on nature conservation and without appearing busy or crowded.

#### *Habitats*

- 2.8 A variety of habitats are present at Kielder, but because of the current land-use, they are widely dispersed. In addition, most of the habitats are poor in nutrients, which means that they support small numbers of specialised species, rather than large numbers of plants and animals that would constitute a wildlife spectacle.

- 2.9 The significant habitats present that could be promoted/interpreted to visitors are as follows:

- Open water
- Running water (upland rivers and streams)
- Coniferous forest
- Moorland (grassland and heather)
- Upland mire
- Deciduous woodland
- River valley
- Hay meadow (just outside of the KWFP)
- Flower rich road verge

#### *Species*

- 2.10 The low levels of nutrients and food available have given rise to a relatively low-number and widely dispersed flora and fauna. For example, whilst there are relatively large numbers of red squirrels, they move around the forest to areas where trees are producing seeds and where there are other abundant sources of food. However, within this, there are some interesting species-watching opportunities.

- 2.11 Species which are present and which could be enjoyed by visitors include the following:

- Red squirrel – Kielder has 50% of the English population and is felt to be the only viable English population capable of withstanding competition from Grey Squirrels without grey control; in fact, greys are controlled in a belt and braces approach
- Roe deer – the large population is kept under control by culling 2,000 per year. Forestry Commission (FC) rangers have a good knowledge of where deer are at any particular time
- Badger – there are a number of Badger setts where watching is possible
- Otter – otters are illusive, but have been seen in the North Tyne above and below the dam and at other locations; signs of otter are easier to see
- Bat – Kielder Castle is a roost for several species and Daubenton's bats hunt on the North Tyne below the Castle
- Osprey – a pair bred successfully at Kielder for the first time in 2009 and, since these birds are very loyal to specific nest sites, are expected to return in 2010 and beyond
- Goshawk – a relatively rare raptor which breeds at Kielder and can be seen displaying in the Spring
- Merlin – another rare raptor which can be seen over moorland at Kielder in the Spring

- Hen harriers – these raptors, which are very rare in England due to severe persecution, have bred at Kielder regularly in recent years. However, they are not faithful to specific nest sites and so are unreliable
- Crossbills – relatively rare in England, found in much of Kielder’s coniferous woodland
- Common woodland birds – close views of birds such as chaffinches can be had at Kielder Castle and the hide at Leaplish
- Pearl mussels – can be seen in tanks at the Salmon Hatchery
- Salmon – young salmon can be seen in the Salmon Hatchery
- Orchids – early marsh and other orchids can be seen during the summer on the C200 verge close to the Calvert Trust
- Sundew – these carnivorous plants are not abundant but can be found at Falstone Moss
- Meadow flowers – can be seen in abundance during the spring and summer between Falstone and Greenhaugh
- Broadleaf trees – attractive at any time of year, the trees make a good show of colour when the leaves turn in the autumn
- Fungi – a wide variety of fungi species are present in abundance during the autumn
- Lichens – wide variety

- 2.12 Most of the above animals and birds are best watched early in the morning or late in the evening as they are more active at these times. In addition, some species are only present, or are best watched at particular times of the year (see wildlife calendar, below). This does not always coincide with visitor flow. For example, birds' plumage is at its most drab in the summer and best in the winter and spring, and the best time to watch goshawks and merlins is in the early spring when they ‘display’ before mating; after this they become more secretive to conceal the location of their nests from predators.

#### *Other Aspects*

- 2.13 Other aspects of nature which could be promoted to visitors are:
- Dark skies – Northumberland (including Kielder) is the darkest place in England and as a result offers spectacular views of the night sky<sup>1</sup>
  - Tranquillity – away from the C200 and the main visitor hubs, it is easy to gain a sense of tranquillity at Kielder, including a lack of traffic noise, few other people visible and a general feeling of being in a remote, wild place

#### **Existing Opportunities to Enjoy Nature**

- 2.14 Specialist naturalists and birdwatchers already visit Kielder (in small numbers) and know what they can see, and where to go to find it. For most people, wildlife at Kielder appears relatively illusive. Existing watching opportunities are summarised here.

#### *Guided Walks and Events*

- 2.15 The Forestry Commission runs a small programme of wildlife events. At present, most of these are clustered in March, May and June, and they are promoted as a ‘mini wildlife festival’ branded as ‘Wild about Kielder’. There are also fungal forays, bat, squirrel and badger events in September and October, plus winter deer safaris in December. A wildlife

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<sup>1</sup> Kielder is within England’s largest remaining ‘reservoir of the darkest category of sky’ according to the Campaign for the Protection of Rural England using analysis of US Air Force weather satellite data

festival at Leaplish was difficult to monitor as the organisers could not differentiate between visitors who were at the site anyway and those who had made a special trip.

- 2.16 The events are guided by FC staff and contractors, plus volunteers, who are experts in their fields. Some of the events coincide with scientific work, which involves removing animals from their nesting boxes (for example owls and bats), giving participants a rare opportunity for a very close-up view.
- 2.17 These guided wildlife experiences are very popular and most operate either at or close to capacity, or are over-subscribed. For example, the autumn 'Fungal Forays' could be sold many times over<sup>2</sup>. Most take place early in the morning or in the evening/night time and demonstrate that it is possible to generate visits outside of the daytime.
- 2.18 Whilst they are very popular and delivered to a high quality, there are significant weaknesses with the programme as a tourism product, as follows:
- Capacity is limited as staff are unable to devote much time to the programme; 130 people attended in 2009
  - Most of the participants are either local people or people staying in the area anyway. This is not uncommon with such events programmes, as locals book up popular events as soon as they are publicised and visitors don't find out about the events until they are in the area and the event already sold out
  - The participation charge is currently £5, which is significantly under the market value. Under pricing could discourage interest from the commercial sector and creates a false value perception amongst the public
  - Individuals leading the tours are not professional 'guides'
- 2.19 Some wildlife tours are organised at Kielder by the commercial sector. In 2009, Northern Experience Wildlife Tours (NEWT) obtained a licence to run guided wildlife safaris in Kielder Forest with access to locked forest roads, etc. The operator has successfully run a small number of full day trips by Land Rover priced at £60 per adult and £40 per child.

#### *Hides*

- 2.20 There are several hides at Kielder but, in the main, they do not at present provide a quality nature watching experience. They are:
- Squirrel hide at Leaplish – the best available, feeders attract red squirrels and woodland birds
  - Raptor Hide at Bakethin – trees have now grown up in front of the hide and the view is restricted
  - Hide of the Forest Drive – overlooks a pond, but often visitors see nothing or little more than mallard

#### *Remote Viewing*

- 2.21 In 2009, the Forestry Commission, in partnership with Northumberland Wildlife Trust and the RSPB established a remote Osprey viewing point at the Mounces Viewpoint. This involved opening a normally locked car park, building a new easy access route up to the view point, locating a portable 'welcome unit' in the car park staffed by volunteers and locating high power telescopes at the view point staffed by volunteers.

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<sup>2</sup> Pers. Com Neville Geddes, Forestry Commission

- 2.22 Although the viewpoint is located over two miles from the osprey nest, clear (if small) views were available via the telescopes on clear days. Whilst a serious birdwatcher would consider such a remote viewing to be a poor one, most of the visitors to the Osprey Watch appeared to have been satisfied with their visit<sup>3</sup>.
- 2.23 During 2009, the Forestry Commission has worked with Save Our Squirrels (SOS) to establish a remote viewing project at Kielder Castle. Here visitors are able to control the direction of a camera which overlooks squirrel feeders at a remote location in the forest. To provide something of interest when no red squirrels are present, an adjacent monitor shows edited, recorded images from the same location. This compliments the opportunity to watch red squirrels on feeders outside of the shop window at the Castle. Red squirrel CCTV images are also displayed at 'The Boat' public house at Leaplish.

#### *Dark Skies*

- 2.24 Kielder Observatory Astronomical Society runs regular events at the Kielder Observatory; these consist of:
- Sky watch events – a talk and use of telescopes to look at the planets and stars
  - Special events – including talks by eminent astronomers
  - Star Camps – an annual residential (camping and caravan) 5-day events each spring and autumn

#### *Other Provision*

- 2.25 At Whitelee Holiday Cottages, Otterburn the surrounding land is managed for nature conservation; CCTV footage is beamed into the cottages and information is supplied on wildlife watching at Whitelee and further afield.
- 2.26 Beyond the boundary of KWFP, the Northumberland National Park Authority interprets wildlife at a number of managed sites, notably Greenlee Lough (where improvements to access and interpretation are to be made during winter 2009/10).

#### **Planned Developments**

- 2.27 Several improvements/developments are already planned for 2010, as follows:
- Improved interpretation of red squirrels at Kielder Castle
  - Construction of a new red squirrel Hide in the valley of the Kielder Burn close to Kielder Castle
  - Improving the Osprey viewing experience by showing CCTV images of birds on the nest at Kielder Castle

#### **Potential Opportunities**

- 2.28 A number possible opportunities for improving access to nature in KWFP were identified during the research and consultation stage of the study, as follows:
- Improve facilities and create more opportunities for watching red squirrels
  - Improve facilities for viewing flora (meadows, mires and orchids)
  - Manage the shoreline at Bakethin more positively for wildlife

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<sup>3</sup> Pers. Coms. Neville Geddes, Forestry Commission and Mike Pratt, Northumberland Wildlife Trust

- Create a circular, self-guided nature trail at Bakethin
- Create self-guided nature trails in the wooded valleys
- Construct an artificial badger hide in a manageable location populated with RSPCA rescue badgers
- Construct a tree top walk/canopy walkway
- Construct a bird hide with one way glass and feeders
- Increase the capacity of the existing wildlife events/guided walks programme
- Run regular wildlife safaris
- Install webcams to relay images back to a single point
- Run night time tours for sky and forest sounds
- Incorporate wildlife watching opportunities into delivery of the Investment Plan, especially at the three main visitor hubs – Tower Knowe, Leaplish and Kielder Castle
- Upper North Tyne Valley is a contrasting landscape which could be part of a package
- The Sidwood area could also be promoted

### Wildlife Calendar

- 2.29 The following 'Wildlife Calendar' shows the best times to see some of the most interesting wildlife at Kielder.

Table 1: Wildlife Calendar

Species	J	F	M	A	M	J	J	A	S	O	N	D
Displaying raptors												
Osprey												
Bats												
Roe deer												
Orchids												
Meadow flowers												
Autumn leaves												
Fungi												
Red squirrels												
Badgers												

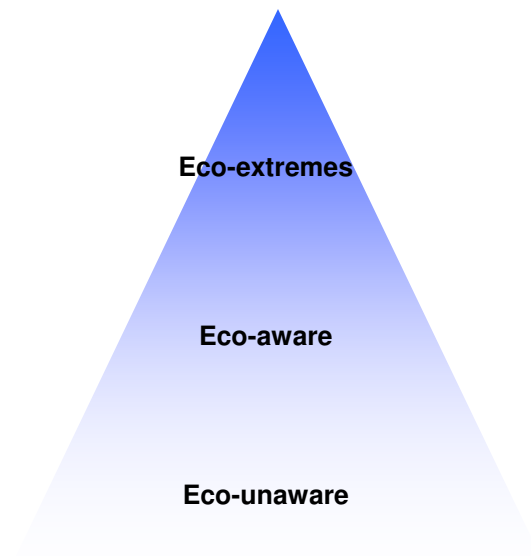
### 3 DEMAND RESEARCH

- 3.1 This section summarises demand for nature tourism in general and in North East England, and it considers current and target markets for the Big Picture within the context of demand for nature tourism.

#### **Demand for Nature Tourism**

- 3.2 It is estimated that approximately 400,000 staying trips and 3,100,000-day trips in North East England each year have ‘enjoying nature study’ as an activity on the trip<sup>4</sup>. Nature tourism displays the characteristics of all niche markets. Demand is pyramid-shaped, with a small number of very committed participants at its apex and increasing numbers of increasingly less committed people towards its base.

Figure 1: Nature Based Tourism Market



Source: One North East

- 3.3 At the top, and relatively few in number, are the ‘eco-extremes’, people who have a high interest in the natural environment and spend much of their leisure time and their holidays enjoying it. Although they spend significant amounts of money on equipment and travel, the amount they spend whilst on a trip is relatively low. They buy equipment at home or on the internet and they are less likely to spend time and money in visitor attractions, shops, restaurants, etc. The arrival of a rare bird will attract a large number of ‘twitchers’, but they will drive to the location, look at the bird and then most will drive away again without visiting other places in the area. The ‘eco-extremes’ are not influenced by marketing and promotion, indeed it might even deter them as they do not want to be in a place where there are a lot of other people.
- 3.4 At the bottom of the triangle are the ‘eco-unawares’. They are high in number, they are more likely to seek visitor services and they can be attracted by marketing and promotion. However, they have little or no interest in the natural environment.

<sup>4</sup> United Kingdom Tourism Survey quoted in North East England Nature-based Tourism Scoping Study, 2009, Bowles Green Limited for One North East

- 3.5 Between these two extremes are the ‘eco-awares’ – people who have a casual interest in the natural environment and who are likely to want to enjoy the countryside and learn about wildlife, habitats and landscapes as part of a more general holiday or day trip. They are also likely to spend in local shops, restaurants and at other attractions.
- 3.6 The ‘eco-awares’ and the ‘eco-extremes’ have been identified as potential target markets for nature based tourism in North East England. These broad segments can be broken down by the area of nature that people are interested in. The ‘eco-extremes’ and upper end of the ‘eco-awares’ tend to be interested in particular aspects of nature, however, most tend to display similar broad characteristics, including:
- They are from higher socio-economic groups
  - They are in older age groups
  - They are interested in gardening and walking
  - They are regular holiday and day trip takers

#### *Birdwatchers*

- 3.7 There are approximately two million birdwatchers in the UK. Birdwatchers' age profile is broader than most of the other specialism's, with more younger participants, particularly males. The largest birdwatching membership organisation, the RSPB has approximately 1 million members (750,000 adults). In addition to the RSPB, there are a number of other birding organisations, including the following:
- Wildfowl & Wetlands Trust - 175,000 members
  - British Trust for Ornithology - 13,500 members, plus volunteers
  - Local, independent bird clubs - an estimated 200 clubs in the UK; membership sizes vary
- 3.8 Members of these organisations receive a monthly news letter and the RSPB has a network of local groups which organise regular trips. Contact details can be obtained by joining one of the national organisations or from web sites including [www.birdsofbritain.co.uk](http://www.birdsofbritain.co.uk).

#### *Botanists*

- 3.9 The number of special interest botanists is much smaller than the number of birdwatchers. There are a number of membership organisations for amateur botanists, including:
- Plantlife International [www.plantlife.org.uk](http://www.plantlife.org.uk)
  - The Linnean Society [www.linnean.org](http://www.linnean.org)
  - The Botanical Society of the British Isles [www.bsbi.org.uk](http://www.bsbi.org.uk)
- 3.10 In addition, organisations such as Flora Locale ([www.floralocale.org](http://www.floralocale.org)) organise events ranging from hay meadow walks to courses on land management. There are also a number of local botany groups - perhaps 100 or so - around the UK. Google searches will give details of local botany clubs.
- 3.11 Uniquely in the world, the UK has a very high level of interest and participation in gardening, which is reflected in high numbers of visitors to gardens open to the public, garden centres, etc. Whilst not specifically interested in wild flowers and plants, most gardeners would fall into the ‘eco-aware’ category and could form a significant potential market for nature based tourism.



### *Geologists*

- 3.12 The number of geologists is also small in comparison to birdwatchers. There are approximately 50 local and regional geology clubs in the UK. Most have a geographic base, though some are thematic. They arrange programmes of talks and visits. Most are affiliated to the Geologists Association ([www.ga.org.uk](http://www.ga.org.uk)). The Association organises conferences, lectures and field visits, for day trips, weekends and longer.
- 3.13 Other organisations include:
- Rockwatch (club for young geologists) [www.rockwatch.org.uk](http://www.rockwatch.org.uk)
  - The Nationwide Geology Club (encouraging families and young people to undertake fieldwork) [www.nationwidegeologyclub.org.uk](http://www.nationwidegeologyclub.org.uk)
  - Local 'Regionally Important Geological and Geomorphological Sites' (RIGS) groups (approximately 60 in the UK, one for each county, though the level of activity varies considerably) [www.ukrigs.org.uk](http://www.ukrigs.org.uk)
  - Open University Geology Club (2,800 members)
  - Local museums (some of which have geology clubs attached)
  - National Association of Historical Mining Associations (86 member groups)

### *Naturalists*

- 3.14 Naturalists – people whose interest covers natural history in general – probably overlap somewhat with the above. Some understanding of their profile can be gained from the number and profile of the County Wildlife Trusts. Collectively, the wildlife trusts have almost 800,000 members (650,000 adults).
- 3.15 Analysis of the readership profiles of natural history special interest magazines shows that in general their readers are: from higher socio-economic groups, high income earners, well-educated and spend more than average on domestic and overseas travel.

### *Potential Demand from Groups*

- 3.16 According to One North East research, around 5,500 group visits are made to North East England each year, worth an estimated £13.2m. Most trips to the region include an overnight stay, the average group size is 50 and average spending is in the region of £50 per person per day. Countryside (16%) and the coastline (13%) are seen as regional strengths amongst group travel organisers. Countryside (59%) and boat trips (56%) were two of the most appealing product aspects for this market.
- 3.17 The key needs of group travel organisers are:
- Good toilet and rest facilities
  - A safe and secure environment
  - Price discounts for groups
  - Adequate facilities to accommodate a group
  - Ease of access/accessibility
- 3.18 Planning of group trips tends to be done over a long period of time and group travel organisers obtain information from a variety of sources – much of it through word of mouth and personal recommendation.

- 3.19 There is potential demand from the travel trade and groups, including:
- Nature clubs and societies in the UK - including RSPB, County Wildlife Trusts and National Trust local groups, local naturalists clubs, RIGS groups, etc
  - Specialist wildlife tour operators based inside and out of the region
  - Travel trade/group organisers – non-specialist group travel organisers who could be attracted by nature watching opportunities, including coach operators, tour operators, social clubs, affinity groups, etc
  - Cruises – shore excursions for cruise ships visiting the Port of Tyne
  - Education – includes schools and higher education groups making visits to the region

#### *General Interest Market Potential*

- 3.20 The bottom tier of the broad 'eco-awares' segment consists of people who have very little interest in nature, but would respond to an interesting and good quality nature product. Experience from RSPB Saltholme, which opened to the public in Spring 2009 supports this view. Early indications are that it is likely to exceed its year one target of 80,000 visitors and that it is attracting a higher proportion of general interest visitors than anticipated.

#### *Tourism Market Segmentation*

- 3.21 Two recent studies of demand for nature tourism<sup>5</sup> (in North East and North West England) have segmented nature tourism demand using the ArkLeisure segmentation method (see Appendix 2). Both of these have identified Habituals, Discoverers and Traditionals as making up the majority of nature tourists. Discoverers and Traditionals, and to a lesser extent Cosmopolitans (because of their very high quality expectations) are identified as the most attractive target markets for nature tourism.
- 3.22 The North East England Nature-based Tourism Scoping study identified the following target markets for the Kielder and the Northumberland National Park Cluster<sup>6</sup>:
- Discoverers
  - Traditionals
  - Cosmopolitans
- 3.22 The behaviour-based market segmentation system (which was used by One North East before it adopted the ArkLeisure method) identified the following as priorities for Northumberland:
- 'Rural hikers'
  - 'Explorers'
  - 'Creatures of habit'
  - 'Family sightseers'
- 3.23 A more detailed explanation of the behaviour system and ArkLeisure market segmentations included in Appendix 2.

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<sup>5</sup> North East England Nature-based Tourism Scoping Study, 2009, Bowles Green Limited for One North East and Marketing the Natural Environment, 2005, TEAM for North West Development Agency

<sup>6</sup> Several development clusters were identified as the basis for developing nature based tourism in North East England (see Table 3)

## Existing and Future Visitors to Kielder

- 3.24 The KWFP Investment Plan has analysed existing visitors and identified target market segments for the future. This is summarised here.

### *Current Visitors to Kielder*

- 3.25 The current volume of visits to Kielder Water and Forest Park is estimated at 300,000 visitor days and 50,000 bed nights per year. It is estimated that 238,000 visits are currently made per annum.
- 3.26 In the absence of primary research to identify ArkLeisure segments present at Kielder, the KWFP Investment Plan authors analysed secondary evidence to make the following assumptions about existing visitor profile under the ArkLeisure segmentation:
- The largest group is that of *Functionals*, estimated at 40%, although it is possible that the proportion is even higher
  - *Discoverers* and *Traditionals* account for 16% and 19% respectively).
  - KWFP currently attracts only a small proportion of *Cosmopolitans* (12% of total visitors, as compared to 29% at a regional level).
  - Other segments are little represented
- 3.27 Research by the Kielder Partnership in 2008 showed that the profile of current staying visitors is similar to the above, with the exception that *Cosmopolitans* were entirely absent (not entirely surprising given the nature of current accommodation provision).

Table 2: ArkLeisure Segments at Kielder

Segment	Region	KWFP Total	KWFP Staying
Cosmopolitans	29%	12%	0%
Discoverers	11%	16%	20%
Traditionals	10%	19%	15%
Functionals	7%	39%	50%
Other	43%	15%	15%

Source: Kielder Water and Forest Park Investment Plan, 2009, JDD Consulting

### *Target Markets for KWFP*

- 3.28 The investment plan contains a strategy which aims to:
- Attract a greater proportion of *Discoverers*, a large, high-spending segment, drawn to active and participative activities (including in a family), with a high propensity to stay overnight and with good potential for repeat visits
  - Develop an offer to attract *Cosmopolitans*, a big, high spending segment with a high propensity to stay overnight, if the offer is right
  - Also grow the proportion of *Traditionals*, a medium sized segment with reasonable spending capacity, a high propensity to stay and a higher than average likelihood to come to KWFP mid-week or in the off-season
  - Maintain and support the *Functionals* market

3.29 The following market segments are also targeted:

- People seeking an active holiday or break - from a desire for a rough outdoors experience to more sophisticated living
- Families, including:
  - Those with young infants, requiring mostly light, low-cost facilities (play area, rowboat, child seat on cycles, etc.)
  - Those with children aged 8 -15, requiring multiple, affordable water and forest activities and opportunities for learning
  - Those with older children, interested in more autonomous activities, often away from the parents
  - KWFP can develop a global offer that can meet the needs of all family groups

#### *Other Information*

3.30 Kielder Partnership commissioned a programme of research in 2006 to test consumer reaction to development proposals and to help to identify target markets. The key findings in relation to wildlife tourism are considered here:

- Awareness of Kielder is highest in the North East region
- Distance is an important issue – people who live within an hour or two see Kielder as a day trip destination. Beyond this, and in adjacent regions, it is more likely to be considered a short break destination
- The main competing destinations for countryside breaks are Yorkshire, Scotland, Wales and the Lake District
- People interested in countryside breaks are seeking a combination of relaxation and activities
- Wildlife watching was 7<sup>th</sup> of the top 10 activities sought on countryside short breaks
- A treetop walk and forest trail were the two most popular development proposals
- Indoor, CCTV based wildlife watching opportunities were seen as less attractive than the real thing as screen images of wildlife are easily accessible at home
- There is demand for activities (children, young adults, families and adults)
- There is interest in a shuttle bus (to Kielder), which suggests that people might be responsive to mini-bus based wildlife tours

## 4 STRATEGIC AND FUNDING CONTEXT

### *Strategic Context*

- 4.1 The regional context for tourism and public sector intervention is set by the North East England Regional Economic Strategy. The objectives of this document, plus local and specific market conditions, are reflected in the following key documents, relevant parts of which are summarised in this section:

- North East England Regional Tourism Strategy
- Northumberland Area Tourism Management Plan (ATMaP)
- North East England Nature-based Tourism Scoping Study
- Northumberland Upwards
- Kielder – The Big Picture
- Living Landscapes

### *North East England Regional Tourism Strategy*

- 4.2 The Regional Tourism Strategy has ten objectives, as follows:

- 1 - To attract more domestic and overseas tourists to the region
- 2 - To increase visitors' average spend and increase day visitor spend
- 3 - To increase visits throughout the year, not solely in the main holiday season
- 4 - To increase employment in tourism, and tourism related businesses
- 5 - To improve the productivity of the regional tourism economy
- 6 - To accelerate the rate of investment in the tourism product
- 7 - To improve the quality of the tourism product
- 8 - To improve the skills of the tourism workforce
- 9 - To improve levels of visitor satisfaction in the North East
- 10 - To enhance and conserve the region's natural, heritage and cultural assets

### *Northumberland ATMaP*

- 4.3 The ATMaP has nine long term strategic objectives, as follows:

- 1 - To increase jobs within the visitor economy
- 2 - To improve job quality and better job security in the industry
- 3 - To create a more entrepreneurial culture in the county by supporting the opening of new sustainable tourism businesses
- 3 - To help safeguard valued local community services, from village shops and rural public houses to town centre museums and leisure facilities
- 4 - To develop and spread the benefits of the visitor economy to all parts of Northumberland, including the south east of the county
- 5 - To help create a higher profile for both Northumberland and the NE region
- 6 - To have benefits to many other sectors of the economy, including the food, crafts and cultural industries, and local supply chains
- 7 - To assist in the attraction of inward investment to the region
- 8 - To improve business practices and create a better trained and skilled workforce as a result of the greater stability and security in the tourism industry
- 9 - To increase capital investment in tourism businesses to the benefit of the wider economy, including building services

*North East England Nature Tourism Scoping Study*

- 4.4 Earlier in 2009, One North East received a scoping study into Nature-based tourism in the region. The study found that the region is under-performing in the nature tourism market, chiefly because the interface between nature and visitors is poor. That is, there is a lack of high quality nature watching opportunities and interpretation, signage and promotion are either absent or of poor quality.
- 4.5 The study recommended development of seven nature ‘clusters’ in the region, one of which is ‘Kielder and the Northumberland National Park’. Red squirrel and raptor watching were proposed as priorities, with dark skies-watching as a secondary activity.

Table 3: Strategic Approach to Cluster Development

Custer	Strategic Approach	Priorities
Northumberland Coast – North	<ul style="list-style-type: none"> <li>Improving the quality of the nature based tourism experience, especially at key sites – Holy Island, Farne Island boat trips and Seahouses</li> </ul>	<ul style="list-style-type: none"> <li>Holy Island</li> <li>Farne Island boat trips</li> <li>Quality of access infrastructure at coastal access points</li> </ul>
Northumberland Coast – South	<ul style="list-style-type: none"> <li>Develop high quality nature watching experiences at Druridge Bay and from Amble Harbour</li> </ul>	<ul style="list-style-type: none"> <li>Druridge Bay nature reserves</li> <li>Northumberland Seabird Centre</li> </ul>
Kielder and the Northumberland National Park	<ul style="list-style-type: none"> <li>Identify and develop high quality nature watching experiences through The Kielder Big Picture</li> </ul>	<ul style="list-style-type: none"> <li>Red squirrel watching</li> <li>Raptor watching</li> </ul>
North Pennines	<ul style="list-style-type: none"> <li>Improve the quality of nature watching experiences throughout the AONB, especially Upper Teesdale and Blanchland &amp; Derwent Reservoir</li> </ul>	<ul style="list-style-type: none"> <li>Bowlees Visitor Centre facilities</li> </ul>
Durham Coast	<ul style="list-style-type: none"> <li>Improve the quality of basic visitor facilities</li> </ul>	<ul style="list-style-type: none"> <li>Car parks at coastal access points</li> <li>Railway station (at Horden)</li> </ul>
Tees Valley	<ul style="list-style-type: none"> <li>Create a nature park of sites linked by CCTV and green routes</li> </ul>	<ul style="list-style-type: none"> <li>Improving access infrastructure and interpretation at supporting sites</li> <li>Green routes network</li> </ul>
Urban	<ul style="list-style-type: none"> <li>Create high quality nature watching experiences in city centres</li> </ul>	<ul style="list-style-type: none"> <li>Lower Derwent Valley</li> <li>Newcastle city centre</li> <li>Durham City woodlands</li> <li>Tees Valley urban parks/beck valleys</li> </ul>

- 4.6 The study recommended four ‘hubs’ for co-ordinated development within the Kielder and Northumberland National Park ‘cluster’, one of which is Kielder, Bellingham and the North Tyne Valley. In addition to Red Squirrels, raptor watching and dark skies, the study proposed improving opportunities to enjoy mires, heather, hay meadows, lichens, bats and waders.
- 4.7 At the time of writing this report, the regional nature tourism initiative is being taken forwards by One North East, which is in the process of agreeing an action plan with the nature cluster partners.

*Northumberland Upwards*

- 4.8 Public sector support for rural regeneration is currently delivered through LEADER groups. KWFP sits within the Northumberland Uplands LEADER Programme Area- the strategy document for the programme is ‘Northumberland Upwards’.

- 4.9 The vision for Northumberland Upwards' is: *'to facilitate the promotion of innovative thinking and the application of new solutions. We believe in joining-up decision making to benefit the economy, community and environment to reach those often left out in our most rural areas. Northumberland Upwards will build on opportunities and address key rural issues. The principal target is to further progress on promoting sustainable growth'*
- 4.10 The strategy has objectives for bio-energy, sustainable communities, sustainable farming and forestry, micro-enterprise development, and recreation and tourism, the latter two are most relevant to wildlife tourism. The objectives are:
- **Micro-Enterprise Development** - To encourage entrepreneurial activity in rural North East England both within and outside traditional land based industries with the objectives of:
    - Increasing business start-ups
    - Strengthening existing businesses
    - Improving the sustainability of rural businesses
    - Creating markets for rural business products and services
    - Encouraging young people in business activity
  - **Tourism and Recreation** - To support tourism and recreation as a driver for sustainable economic development in the North East, with objectives of:
    - Promoting tourism and recreation (including sport and leisure) as an opportunity for business start up and diversification
    - Enhancing the contribution of rural areas to the tourism offer of the North East
    - Improving the quality of the rural tourism offer in the North East
    - Exploring innovative ways of using rural natural, cultural, geological and historic assets in a sustainable way

#### *The Big Picture*

- 4.11 'Kielder – the Big Picture' is the development strategy for KWFP. Wildlife/nature tourism at Kielder can contribute to the following aims:
- KWFP will be known primarily for its outdoor activities, on lake, in forest and on fells. However, the range of activities will also include:
    - Enough indoor or covered sporting activities to take account of poor weather, in particular at Leaplish
    - Family entertainment areas, outdoor and indoor
    - Courses and seminars (cooking, painting, sailing, etc.)
    - A rich, year-round performance and participatory events programme
  - With regard to the outdoors, KWFP will offer both DIY and programmed events, including both high and low adrenalin activities
  - KWFP will become one of the leading destinations of the North East, offering outdoor activities on a scale and in a style unmatched in the UK
  - KWFP will become a highly attractive short-break destination, appealing to a mass market, as identified previously in this report

- KWFP will appeal to those seeking an active holiday or break, offering activities of interest to all ages and both sexes, and a wide range of tastes, from a desire for a rough outdoors experience to more sophisticated living
- 4.12 The aim is to develop a 'menu' of outdoor activities on water and on land which range from the relatively conventional, safe and familiar to the surprising, 'dangerous' and untried. Wildlife watching can contribute safe and surprising experiences.
- 4.13 The Big Picture includes a range of products that appeal to adults and to families. The North East England Nature-based Tourism Scoping study found that nature watching appeals to a wide range of age groups, including all types of families.

#### *Living Landscapes*

- 4.14 Living Landscapes is a regional project which is being progressed by the three wildlife trusts (Durham, Northumberland and Tees Valley). It aims to improve large areas of the region for the benefit of wildlife and people as well as helping people and wildlife adapt to climate change. Kielder Forest is one of the nine areas in the North East selected for improvement.

#### **Funding**

- 4.15 Whilst it is felt that most of the actions required to maximise the potential for wildlife tourism at Kielder can be achieved by including them within proposals already in the Investment Plan, additional funds could be obtained from the following sources:
- Rural Development Plan for England (RDPE) – primarily through LEADER, especially where income generation is a possibility, and also, where appropriate through the Forestry Commission and Natural England RDPE programmes
  - Business and Community Assets funding programmes for larger capital projects
  - Additional external funding as appropriate (for example Landfill Tax, HLF, etc)



## 5 APPROACHES TO WILDLIFE TOURISM

### Best Practice Experience in Watching Nature

- 5.1 This summary of best practice experience considers methods for watching the following. These are detailed in Appendix 3 and outlined briefly here:
- Birds
    - Nature reserves with hides
    - Cruises and self-driven boats
    - Hides and telescopes set up to observe raptor nests
    - Remote viewing by camera
    - Providing information to enable people to 'self-guide' around good bird habitat
    - Guided walks and events
    - Watching common birds
  - Red squirrels
    - Squirrel hides with feeders
    - Self-guided trails
    - Guided walks
  - Deer
    - Land rover safaris
    - Walks with a gamekeeper/ranger
    - Guided pony treks
  - Badgers
    - Guided watches
    - Sunken hides with talk and guide
  - Otters
    - Guided walks seem to work best
  - Bats
    - Guided evening events with talk, guide and ultra sound detection equipment
  - Flora
    - Tree-top/canopy walkways
    - Self guided and guided walks
    - Seasonal festivals of walks and events
  - Fungi
    - Guided walks appear to be the most successful
  - Geology
    - Festivals (e.g. Northern Rocks in the North Pennines)
    - Using art to interpret geology
    - Explorer boxes
  - Night sky
    - Providing telescopes and tuition at accommodation
- 5.2 Some destinations have used characteristic habitats or species to differentiate themselves from other destinations, for example Barnacle Geese in Dumfriesshire, Sea Eagles on the Isle of Mull and heathland (the Sanderlings) in Suffolk.
- 5.3 Trails are a common method of promoting nature tourism – for example Red Kite Trails in Mid Wales, the Lower Derwent Valley in North East England and the Glenkens of Galloway. Previously, Northumberland Wildlife Trust used an Oystercatcher to brand a Northumberland Coast Birdwatching Trail.

- 5.4 There have been a number of experiments with schemes to generate contributions from visitors to conservation. The most successful is the Lake District Tourism and Conservation Partnership (now branded as 'Invest in the Lakes').
- 5.5 In general it has proven difficult to find cost effective ways of engaging visitors in conservation. Invest in the Lakes has succeeded by developing a suite of easy methods by which tourism businesses can collect funds and linking these to local conservation projects. However, this scheme required significant 'pump priming' by the Lake District National Park Authority, Cumbria Tourism and the National Trust.
- 5.6 Plantlife has recently obtained a Big Lottery grant of £450,000 over 4 years to encourage novices to collect and record information on the distribution of plant species, similar to the Hancock Museum's 'Eye Project'. Authorities in Dumfries and Galloway are considering opportunities to link environmental records to tourist information to enable visitors to use this data to plan trips and contribute sightings information.

## 6 ANALYSIS

- 6.1 The first aim of the study was to demonstrate the potential to develop wildlife tourism in the KWFP. To do this, the consultants have taken demand as the starting point. They then considered the potential of the product to meet actual and potential demand. Issues and opportunities arising from the strategic and funding contexts are considered in the delivery plan (section 8), below.

### Analysis of Demand

- 6.2 There is no primary research to demonstrate demand for wildlife tourism at Kielder, however, a number of secondary research findings suggest that there is demand for good quality, 'real' wildlife experiences, as follows:
- The North East Region is under-performing in the wildlife tourism market in comparison with other English regions
  - The main reason for the region's under-performance is the poor quality of the nature-people interface (promotion, signage, interpretation, watching opportunities/facilities)
  - Wildlife events/guided walks at KWFP are oversubscribed
  - Accommodation providers in and around Kielder report demand for wildlife watching and want products to recommend and promote to their guests
  - Specialist nature tour/guide providers have proven a market for nature watching (over 100 such businesses are members of Wild Scotland<sup>7</sup>)
  - Northern Experience Wildlife Tours (NEWT) has demonstrated some demand for wildlife tourism at Kielder. National tour operators Island Holidays and Naturetrek are operating holidays for birders/naturalists in Northumberland, demonstrating demand for a packaged experience in the region
  - The success of RSPB Saltholme has proven strong demand for access to birds and nature within the region
- 6.3 Demand for wildlife experiences from the general (non special interest) public is driven to a degree by wildlife television programmes. Spring and Autumn Watch have had a significant impact regionally and the BBC Wildlife Unit series generate huge audiences in the UK and around the world.
- 6.4 It would be logical to conclude, from the popularity of such programmes, that the public seeks 'wildlife spectacles' or 'close-up and personal' experiences with wildlife, and that anything less would be a disappointment and a market failure.
- 6.5 However, several sources suggest that this is not the case, including:
- Rangers, wardens and others working in the conservation sector report that the general public are fascinated by a direct experience with what environmentalists and countryside managers would consider to be very mundane species – for example common passerine birds<sup>8</sup>
  - Wildlife tour operators report that clients participating in otter watching tours where none were seen were not disappointed, rather they appreciated the search almost as much as the sighting
  - Initiatives to show visitors common species have proven to be very popular, attracting large numbers of visitors (for example Greater Spotted Woodpecker at Clumber Park)

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<sup>7</sup> Wild Scotland is a trade association for wildlife tourism providers in Scotland

<sup>8</sup> Consultation notes from the North East England Wildlife Tourism Scoping Study

- 6.6 In addition, market research to inform The Big Picture suggested that visitors preferred to see the real thing rather than webcam or CCTV footage which is unlikely to be better than watching wildlife television programmes at home, and certainly not worth making a trip for.
- 6.7 It would appear that the 'eco-awares' broad market segment has the greatest potential for Kielder. People in this group is likely to respond to organised wildlife watching opportunities and to good quality, self-guided experiences.
- 6.8 In addition, the available segmentation analysis suggests that the profile of the wildlife tourism market closely matches the target markets for the KWFP Investment plan and therefore that developing and promoting wildlife tourism at Kielder would have a positive impact on the Investment Plan targets. The target markets for the KWFP Investment plan are:
- Discoverers – attract a greater proportion
  - Cosmopolitans – develop an offer to attract this segment
  - Traditionals – grow the proportion of this segment
  - Functionals – maintain and support this market
- 6.9 The nature tourism market has a high proportion of:
- Discoverers
  - Traditionals
  - Cosmopolitans
- 6.10 In addition, a high proportion of existing nature tourism day visitors in North East England are Functionals.

#### **Analysis of the Product**

- 6.11 Kielder does not have the potential to become a major wildlife tourism destination because of the limited and dispersed nature of the wildlife present. However it has a number of interesting opportunities to experience nature (both existing and potential) which will appeal to the local and regional target markets outlined above, and which will encourage visitors to spend more and stay longer.
- 6.12 The existing nature watching offer at Kielder is limited and varies in quality from very good (guided trips) to poor (self-guided experience); it can be summarised as follows:
- In the main the watching experience from the existing hides is poor
  - The existing trails/routes have poor or no wildlife interpretation
  - Interpretation of wildlife is mixed – the hatchery has modern interpretation which has been well-financed but the interpretation in the Castle is dated
  - Guided experiences are of a high quality but very limited in capacity
- 6.13 The Big Picture partners have little or no spare capacity to provide additional wildlife experiences and existing budgets for additional interpretive provision are limited (squirrel hide at Kielder Burn, red squirrel interpretation at Kielder Castle, CCTV of osprey beamed to Kielder Castle).

- 6.14 The private sector has made a modest investment in Kielder as a wildlife tourism destination (NEWT has promoted a small number of Kielder Safaris on its website) but is unlikely to take significantly more risk without some form of inducement of support.

### Policy Context

- 6.15 Wildlife tourism at Kielder would help to deliver a number of regional, sub regional and local strategies, in particular, if developed, it would:
- Provide new, high quality wildlife watching experiences
  - Develop Kielder as a wildlife tourism hub within the Kielder and Northumberland National Park nature tourism cluster
  - Generate new business opportunities and employment
  - Appeal to Discoverers, Traditionals, Cosmopolitans and Functionals – the KWFP Investment Plan target markets
  - Generate economic impact at Kielder through additional spending on existing trips, extending the length of existing trips and generating new trips

### SWOT Analysis

- 6.16 This analysis is summarised in the SWOT (strengths, weaknesses, opportunities, threats) analysis shown below.

Table 4: SWOT Analysis of Wildlife Tourism at Kielder

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>▪ Robust landscape</li> <li>▪ Stakeholder land ownership</li> <li>▪ Stakeholder expertise and knowledge</li> <li>▪ The Big Picture and Kielder is a key regional development project</li> <li>▪ Year-round wildlife calendar</li> <li>▪ Number of interesting species present, including red squirrels, osprey, bats, deer, badgers, otters</li> <li>▪ Darkest skies in England</li> <li>▪ Sense of tranquillity</li> </ul>	<ul style="list-style-type: none"> <li>▪ Vegetation dominated by coniferous forest</li> <li>▪ Low nutrient and food levels generally, which support only small populations of plants, birds and animals</li> <li>▪ Many of the interesting species present are hard to watch (deer, bats, otter, etc)</li> <li>▪ Osprey nest distant from watch point</li> <li>▪ Distance from areas of high population</li> <li>▪ Stakeholder lack of resources to develop and manage nature watching</li> <li>▪ Midges</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>▪ Demand from eco-awares</li> <li>▪ Emerging regional nature tourism action plan</li> <li>▪ Wildlife tour operator interested in expanding current activity</li> <li>▪ Commercial nature watching models</li> <li>▪ Accommodation providers keen to promote wildlife tourism</li> <li>▪ Policy support for wildlife tourism</li> </ul>	<ul style="list-style-type: none"> <li>▪ Failure to invest</li> <li>▪ Grey squirrels out-competing reds</li> <li>▪ Osprey might not return</li> <li>▪ Disturbance of wildlife by visitors</li> </ul>

## 7 RECOMMENDATIONS

7.1 From the above analysis it is possible to conclude that wildlife tourism at Kielder cannot be developed and promoted as a primary product – in the way that mountain biking, water sports and other activities can. However, it can be developed as one of a menu of activities which visitors to Kielder can undertake, and if developed in a co-ordinated way, can contribute towards the Investment Plan targets

7.2 The economic potential of the wildlife resource can be maximised by delivering a co-ordinated programme of strategies as summarised below. These are further detailed in the delivery plan.

### **Recommended Strategies**

7.3 The following strategies are recommended:

7.4 *Target 'eco-awares'*

- Primary target markets should be:
  - o Existing and potential staying visitors
  - o Tourists staying in adjacent sub-regions (Rural Northumberland and Hadrian's Wall)
  - o Affinity groups
- Secondary target markets should be
  - o Existing and potential day visitors
  - o Education sector

7.5 *Land management for bio-diversity and nature conservation*

- Continue to control any grey squirrel and deer population
- Manage the Bakethin shoreline for nature conservation
- Manage the wooded burn valleys for nature conservation
- Incorporate wildlife into a new landscape design plan for Leaplish
- Manage the upland mires for nature conservation
- Continue to monitor breeding birds and manage accordingly

7.6 *Develop a range of high quality wildlife watching experiences*

- Develop Kielder Castle as the focus for wildlife
- Develop half day wildlife safaris
- Develop daytime (red squirrel, fungi), morning (deer) and evening (bats, deer, owls, badgers) wildlife experiences
- Develop self-guided trails in the wooded burn valleys
- Formalise viewing of meadow flowers between Falstone and Greenhaugh
- Improve access and interpretation at Bakethin
- Develop a new bird hides for common and other birds
- Investigate the potential for a badger watching experience
- Develop a programme of nature events to reflect the wildlife calendar
- Make rangers' knowledge available to the private sector and licence private sector operators to run the wildlife experiences outlined above
- Supporting Kielder Observatory and Astronomical Society in developing and promoting its events and products

## 7.7 *Marketing strategies*

- Incorporate wildlife tourism marketing into the marketing strategy for KWFP
- Deliver an Annual Promotion Campaign
- Develop and promote a wildlife calendar
- Promote red squirrels as the anchor experience/iconic species
- Establish a booking system for events and tours – promote through accommodation and existing visitor centres, TICs, etc

## 7.8 *Develop partnerships for delivery and marketing*

- Conservation management partnership to develop an action plan for habitat management and improvement (Northumbria Wildlife Trust, Forestry Commission, Northumbrian Water)
- Individual partnerships for each wildlife watching proposal (KP to lead)
- Nature tourism marketing group (KP plus the Bellingham and Redesdale business associations)

## 8 DELIVERY PLAN

- 8.1 The recommended Delivery Plan is summarised in the tables below and described in this section of the report.

### General Approach

- 8.2 The delivery plan should conform to a broad approach with the following five themes
- The Wildlife Tourism Delivery Plan should be integrated into the KWFP Investment Plan and other existing management plans; every opportunity should be taken to incorporate management for wildlife and wildlife watching opportunities when delivering the Investment plan and other actions
  - In order to maximise capacity and economic benefit, where possible, wildlife experiences should be provided by the commercial sector
  - Wildlife tourism at Kielder should focus on showing people when and where they can enjoy wildlife – it should do this by offering a menu of guided and self guided experiences
  - Wildlife tourism at Kielder should focus on providing face to face opportunities to enjoy wildlife; webcams/CCTV should be used to support these ‘real experiences’
  - Provision and marketing should use the Kielder Wildlife Calendar as a basis and it should be delivered - at least initially - in spring, autumn and winter when midges are less troublesome

### Recommended Strategies

- 8.3 Opportunities to improve and extend existing habitats and create new areas of habitat are already incorporated into existing management plans (for example mires and red squirrels); this should continue and new opportunities incorporated where possible.
- 8.4 Opportunities should be identified and taken to improve existing habitat, create new habitat and to re-introduce ‘lost’ species. FC and partners are currently considering re-introducing voles into an area of the Lewis Burn valley and in the longer term, beavers have been proposed, though wider forest management issues would need to be considered and fully understood before this could occur.
- 8.5 Conservation management is already an objective of the land owners at Kielder. Specific management for wildlife tourism should be a role for a Conservation Management Partnership (see DP1 below) along with the delivery of the land management tasks described below.

Table 5: Land Management for Bio-diversity/Nature Conservation

Ref	Task	Description	Cost Estimate	Delivery Partners
LM1	Continue to control any grey squirrel and deer population	Monitor and destroy grey squirrels that reach Kielder Forest. Continue annual deer cull to maintain a sustainable deer population	Existing	FC
LM2	Manage Bakethin for nature conservation	Produce a Conservation Management Plan (CMP) for Bakethin Nature Reserve Including moving back trees from a section of shore and managing grassland for breeding waders	£5k plus on-going resource specified in CMP	KP



Ref	Task	Description	Cost Estimate	Delivery Partners
		Allocating resources for management		
LM3	Manage the wooded burn valleys for nature conservation	Continue to manage Lewis Burn and Kielder Burn (to include Kielder Castle surrounds) to maximise bio-diversity in these areas	On-going resource specified in CMP	FC
LM4	Incorporate wildlife into a new landscape design plan for Leaplish	A new landscape plans required for Leaplish to remove traffic from the lakeshore and improve the landscape in advance of significant investment. This should include a detailed audit of wildlife watching opportunities and a wildlife management plan (WMP)	£5k plus on-going resource specified in WMP	NWL, NWT
LM5	Manage the upland mires for nature conservation	Continue to manage the Spadeadam and Kielder mires for nature conservation	Existing	FC (NWT)
LM6	Continue to monitor breeding birds and manage accordingly	Annual wader and raptor breeding birds surveys and management as appropriate	Existing	FC, EN, RSPB, NWT

*LM1: Continue to Control Any Grey Squirrel and Deer Population*

- 8.6 Although it is believed that grey squirrels will not be able to survive in Sitka Spruce forest and that the network of groups of red squirrels which are dispersed around Kielder Forest are able to withstand squirrel pox, greys would be capable of colonising areas where red squirrels and birds are fed regularly and around settlements where more food is available. If a high quality tourism red squirrel experience is to be developed and maintained, it will be important to continue to prevent any attempt by greys to colonise Kielder.
- 8.7 A system of observation and destruction of any grey squirrels moving up the North Tyne into the forest is in place. Occasionally, it appears that greys are released in Kielder Forest, probably by people who have caught them and want to remove them humanely; these incidents are more difficult to identify and manage. It is essential that resources for this process of control are at least maintained.
- 8.8 Management of the deer population is important to control damage to trees and hence timber production. A consequence of deer management is that FC rangers are continuously aware of the approximate location of deer herds, information which could be very useful in planning deer watching for visitors.

*LM2: Manage Bakethin for Nature Conservation*

- 8.9 Bakethin Nature Reserve is really only such in name, there is little by way of positive management for nature conservation and less to provide access and interpretation for visitors. Bakethin is an interesting area and could provide an interesting, self-guided wildlife experience.
- 8.10 A conservation management plan should be developed by the Kielder Partnership to maximise bio-diversity at Bakethin and to provide opportunities for people to enjoy it.

- 8.11 During the consultation, NWA identified an opportunity to take the tree line back from the lake shore on a section of the south shore of Bakethin, where the Lakeside Way is located away from the shore, and then managing the shore as unimproved grassland as a habitat for breeding waders. In turn this might provide watching opportunities for visitors. Careful consideration would need to be given to the impact on woodland stability before a decision is made.

*LM3: Manage the Wooded Burn Valleys for Nature Conservation*

- 8.12 Kielder Burn and the deciduous woodland around Kielder Castle, and Lewis Burn are attractive areas where management for nature conservation and enjoyment would create opportunities for the development of self-guided trails and possibly other interpretation.
- 8.13 FC should produce conservation management plans for these areas, with public enjoyment of nature as a key objective.

*LM4: Incorporate Wildlife into a New Landscape Design Plan for Leaplish*

- 8.12 Development of visitor facilities at Leaplish has occurred in a relatively piecemeal fashion with little overall master planning. Given the proposals in The Big Picture, it would be advantageous to formulate a new landscape plan for Leaplish into which the new development proposals can be fit. This presents an opportunity to identify spaces where wildlife could be encouraged and enjoyed.
- 8.14 NWA should develop such a plan, which might include removing vehicular traffic from the lake shore area and could incorporate a nature trail with hides and feeders as well as a more extensive version of the wildlife garden. It should also consider the future role and nature of the Birds of Prey Centre. Some aspects of this attraction do not reflect the approach to wildlife tourism described in this study and could merit review at a future date.

*LM5: Increase the Area of Broadleaf Woodland*

- 8.15 Broadleaf woodland cover is being increased as part of the Forest Design Plan process. This should continue, but not to the extent that red squirrel habitat is threatened and grey squirrel habitat is created.

*LM6: Manage the Upland Mires for Nature Conservation*

- 8.16 FC has made considerable and swift progress in restoring mire habitat in and around Kielder Forest. This process should continue and the 'health' of mires and accessibility should be increased where possible.

*LM7: Continue to Monitor Breeding Birds and Manage Accordingly*

- 8.17 Existing annual surveying of breeding raptors and waders by FC should continue and management applied as appropriate. At present, wader numbers are very low and do not merit promotion of wader watching as an activity by visitors.
- 8.18 Information from the raptor survey could provide useful data for incorporation into interpretation of Kielder's wildlife at Kielder Castle.

Table 6: Develop a Range of High Quality Wildlife Watching Experiences

Ref	Task	Description	Cost Estimate	Delivery Partners
WE1	Develop Kielder Castle as the focus for wildlife	New wildlife interpretation linked to nature trails	£50k	FC, NWT, SOS
WE2	Develop half day wildlife safaris	Develop half day safari itineraries for different times of the year, including transport and watching with a guide	Nil	Private sector
WE3	Develop daytime (red squirrel) and evening (bats, owls, badgers) wildlife experiences	Build on FC experience to develop an extended programme of the existing wildlife guided events operated by the commercial sector	Nil	Private sector, FC
WE4	Develop self-guided trails in the wooded burn valleys	Develop and re-brand the Dukes Trail and the Duchess Trail as nature trails from Kielder Castle. Develop a similar trail from Matthew's Linn in the valley of the Lewis Burn. Include audio and printed information.	£30k	FC
WE5	Formalise viewing of meadow flowers downstream of Falstone	Create a lay-by for parking, an interpretation point and, if possible, provide temporary access to the meadows downstream of Falstone.	£20k	NNPA
WE6	Improve access and interpretation at Bakethin	In parallel with the proposed CMP (see LM2), develop a new nature trail with viewing points and interpretation at Bakethin.	£10k	NWT, FC, NWL
WE7	Develop new bird hides	Identify locations on the nature trails proposed above and on the Lakeside Way where bird hides could be located. These should be artist-designed and of a comfortable quality and provide 'access for all'. Hides located close to managed sites should also have feeders.	£50-£100k	FC, NWL, NWT, CT
WE8	Investigate the potential for a badger watching experience	As a development to the guided badger events proposed above (see WE3), investigate the construction of an artificial hide at a manageable location and development of a 'sunken' hide and covered space for briefing, catering, etc	£10 for study	NWT, FC
WE9	Develop a programme of events to reflect the wildlife calendar	The events proposed in WE2 and WE3 should reflect the 'Kielder Wildlife Calendar'	Nil	All
WE10	Make rangers' knowledge available to the private sector and licence private sector operators	FC, NWA and NWT should work with interested commercial sector providers to transfer knowledge and supply up to date information on the presence of wildlife	Nil	FC, NWL, NWT, private sector
WE11	Support KOAS in developing and promoting events and products	Work with Kielder Observatory Astronomical Society to investigate and pilot new products and events and to promote its activities more effectively	Nil	KP

*WE1: Develop Kielder Castle as the Focus for Wildlife*

- 8.19 As identified in the Investment Plan, Kielder Castle is not an ideal building for use as a visitor centre and in the longer term it is likely that a new, purpose-built centre will be developed along with other facilities including a tree top walk. In the meantime, however, it is important that there is a focus for the interpretation of wildlife at Kielder and the management of wildlife tourists. The Kielder (Castle and village) area has already been designated as the location for interpretation of the natural environment.

- 8.20 Improved red squirrel interpretation is already planned for winter 2009/10 and CCTV images from the osprey nest are proposed for 2010. Further investment should be made in interpretation of other aspects of wildlife at Kielder. The interpretation should encourage people to make self guided walks along the nature trails or to book on a guided experience.
- 8.21 The Castle should provide information on Kielder's wildlife product and a booking service for guided experiences.

*WE2: Develop Half Day Wildlife Safaris*

- 8.22 In order to show people wildlife at times when it is most active, seasonal itineraries should be developed for morning and afternoon half-day safaris. These would be bookable in advance with collection points at clusters of accommodation (Leaplish, Bellingham and possibly Redesdale and the North Tyne Valley to Hexham). They would include transport, visits to a variety of locations to see nature, the services of an expert guide and breakfast or supper. Binoculars and other equipment could be provided on request or for hire.
- 8.23 The safaris should operate on fixed days of the week for a period which is publicised in advance (initially spring and autumn). The safaris should be promoted through Kielder Castle (and Leaplish and Tower Knowe) and at accommodation providers and TICs in the wider area (Redesdale, North Tyne Valley to Hexham, Northumberland Coast). A booking system will be required.
- 8.24 The safaris should be operated by an existing or new commercial operator. NEWT has expressed an interest in piloting such a programme of wildlife safaris in spring or autumn of 2010 and it is strongly recommended that the Partnership explores this possibility at an early opportunity. To be effective, an operator should be supported with marketing, promotion and a booking system.

*WE3: Develop Daytime (Red Squirrel Fungi), Morning (Deer)) and Evening (Bats, Deer, Owls, Badgers) Wildlife Experiences*

- 8.25 It is recommended that the current programme of guided wildlife experiences is expanded by transferring existing expertise of FC, NWA and other staff at Kielder to a licensed private sector operator.
- 8.26 These experiences should be operated and promoted in the same way as the half day safaris. Capacity should be increased steadily and should be monitored along with promotion to achieve sustainable growth. KP could assist the private sector with marketing planning, delivering promotion and business planning for the programme.
- 8.27 At present FC runs badger watching events from Wark. The sett is especially suitable as it is located across a stream from the watching point. Although this location is outside of the inner KWFP area, it is recommended that in the first instance this location is developed to pilot the expansion of badger watching by the private sector. In time, a new location could be developed more central to KWFP (see WE8).

*WE4: Develop Self-guided Trails in the Wooded Burn Valleys*

- 8.28 Conversion of the existing Dukes and Duchess Trails at Kielder Castle and development of a new trail along the valley of the Lewis Burn. Development of trails should occur in parallel with the development of Conservation Management Plans (see LM3).
- 8.29 The installation of structures should be minimised. These could include one of the proposed artist-designed hides (see WE7) but should avoid interpretation panels and similar clutter. Instead, interpretation should consist of printed information available at KWFP and downloadable from the Kielder website, and audio guides in MP3 format which can be downloaded from the Kielder website or bluetoothed to visitors' MP3 devices at KWFP.

*WE5: Formalise Viewing of Meadow Flowers Downstream of Falstone*

- 8.30 Although this site is located outside of core KWFP area, the meadow flowers are especially good in the North Tyne Valley just below the dam. However, the facilities for viewing the meadows are poor.
- 8.31 Ideally a small lay-by should be created and pedestrian access created either along the road edge or actually in the meadows. The latter has been achieved by 'Flora Locale' working with landowners in the Yorkshire Dales and by the North Pennines AONB to negotiate permissive, temporary access on a pre-agreed route.
- 8.32 Interpretive information could be provided in similar formats to the self-guided trails.

*E6: Improve Access and Interpretation at Bakethin*

- 8.33 Access and interpretation should be improved at Bakethin in the same way as that proposed for the wooded burn valleys (see WE4). At present the arrival experience is poor, it is difficult for visitors to work out which way to walk and there is no interpretation of wildlife.
- 8.34 Improvements should be implemented in parallel with the CMP (see LM3) and should consist of improved car parking facilities, including a sense of arrival and orientation information, a nature trail with printed and audio information, as described in WE4, and designated wildlife watching points.

*WE7: Develop New Bird Hides*

- 8.35 No specific locations for new hides were identified during the study. These should be identified in the future through the work recommended here on Conservation Management Planning and access/interpretation improvements, and when other developments are being planned as part of delivery of the Investment Plan (Leaplish, Calvert Trust, Kielder Castle area, North Shore, etc).
- 8.36 The hides should incorporate interpretation of aspects of Kielder's wildlife into their design. This would create visitor interest at times when little or no wildlife is present. Those close to managed sites should have feeders to encourage birds and red squirrels to visit and they could incorporate other features, such as one-way reflecting glass, to bring birds and people even closer together (see best practice examples in Appendix 3). A network of hides should be built as part of the delivery of the Investment Plan.

*WE8: Investigate the Potential for a Badger Watching Experience*

- 8.37 The Devon Badger Watch (see Appendix) and Low Luckens Farm in Cumbria show that a well-managed badger watching experience consisting of an introductory talk, guided watching and (in the case of Low Luckens) an evening meal is appealing to the wildlife watching market.
- 8.38 During the consultation, the idea was raised of creating a new badger sett, populated with rescued badgers at a location where supporting facilities could be developed. This suggestion has a number of challenges, including the following:
- Badgers are protected species and cannot be moved without a license
  - Badgers are very territorial, so introducing new badgers to an area already used by an established population could cause conflict
  - Badgers are taken for use in badger baiting, and easily accessible setts could be tempting to baiters
- 8.39 It is felt that these challenges could be overcome using experience from elsewhere, together with careful research and planning. It is therefore recommended that a detailed study is undertaken of the feasibility of establishing an artificial sett and associated watching facilities to create a high quality watching experience at Kielder.

*WE9: Develop a Programme of Nature Events to Reflect the Wildlife Calendar*

- 8.40 The proposed wildlife experiences described in this group of actions should fit with and reinforce the Kielder Wildlife Calendar described in paragraph 2.29. It is recommended that the calendar be promoted strongly in order to raise awareness of what can be seen at Kielder and when. NNPA already produces such a calendar for the National Park in its annual visitor guide and the regional nature based tourism initiative is looking to use seasonal events to promote interest and visits.
- 8.41 The calendar could be used on websites, wildlife information leaflets, tent cards and placemats at catering and accommodation outlets, etc.

*WE10: Make FC Rangers' Knowledge Available to the Private Sector and Licence Private Sector Operators*

- 8.42 If the capacity of guided wildlife experiences is to be increased by working with the private sector, and if quality is to be maintained, it is essential that existing knowledge of habitats and species at Kielder is transferred to private sector operators. It is also important that up-to-date information of the presence and location of wildlife species (especially deer) is also made available to operators.
- 8.43 This should be done through a process of bringing operators together with the existing rangers on site, developing a wildlife guide's 'handbook' or 'reference book' and establishing a method for collecting and transferring current location information. Access to this information should be restricted to licensed operators and would be one of the benefits of any license fee.

*WE11: Support KOAS*

- 8.44 KOAS has already developed a programme of events and experiences and the Partnership should support their further development by providing marketing and other expertise.

Table 7: Marketing and Promotion

Ref	Task	Description	Cost Estimate	Delivery Partners
MP1	Incorporate wildlife tourism marketing into a KWFP marketing strategy	Ensure that the marketing and promotion of wildlife is mainstreamed into marketing and promotion of Kielder the destination	£?	KP
MP2	Deliver an annual promotion campaign	Work with the providers of wildlife experiences to plan and deliver an annual promotion campaign	£10k	KP, private sector
MP3	Develop and promote a wildlife calendar	Agree, produce and distribute the calendar as the basis for promotion of wildlife at Kielder	£5	KP, NWT
MP4	Promote red squirrels as the anchor experience	Use the red squirrel on all promotional information and base Kielder Wildlife Tourism branding on this animal	£?	KP
MP5	Establish a booking system for events and tours – promote through accommodation and existing visitor centres, TICs, etc	The system would be easily accessible remotely by the internet, beyond Kielder at TICs and accommodation and within Kielder at Tower Knowe, Leaplish and the Castle	£10k pump priming	KP, private sector

*MP1: Incorporate Wildlife Tourism Marketing into a KWFP Marketing Strategy*

- 8.45 Target markets for wildlife tourism at Kielder are ‘eco-awares’ –who are also Discoverers, and Traditionals; Cosmopolitans should be targeted in the longer term as overall product quality improves. In the short term:

- Primary target markets should be:
  - Existing and potential staying visitors
  - Tourists staying in adjacent sub-regions (Rural Northumberland and Hadrian’s Wall)
  - Affinity groups
- Secondary target markets should be
  - Existing and potential day visitors
  - Education sector

- 8.46 Wildlife tourism marketing should be fully integrated into the KWFP marketing strategy and marketing delivery, with coordinated activity by all partners.

*MP2: Deliver an Annual Promotion Campaign*

- 8.47 An annual promotion campaign should be planned by KP and partners. It should be based around the Kielder Wildlife Calendar and the timetable for the programme of wildlife experiences and should include traditional and electronic methods of information delivery.
- 8.48 To support the promotion plan, methods of data capture should be established, especially at Kielder Castle and through the Kielder website, where the greatest contact with ‘eco-awares’ will occur.



- 8.49 The system for transferring information on wildlife from rangers to the private sector (see WE10) could also provide up to date information for promotion via the Kielder website, SMS/MMS, Facebook and Twitter.

*MP3: Develop and Promote a Wildlife Calendar*

- 8.50 The basis for a wildlife calendar is proposed in paragraph 2.29. This should be agreed by partners and used as the basis for promoting wildlife tourism at Kielder. The Northumberland National Park Authority wildlife calendar is a good model to follow – this is included in the annual visitor guide and has pictures of what can be seen in each season. The concept behind the calendar is to help non-specialists understand what they can see, at which times of the year in which habitat and specific locations.

*MP4: Promote Red Squirrels as the Anchor Experience*

- 8.51 The consultation shows that land managers at Kielder are relatively confident that red squirrels will survive in Kielder Forest for the foreseeable future. In fact, Kielder is the only location in England where this is the case. It would therefore appear appropriate to use the red squirrel as the ‘anchor’ or ‘iconic’ species for Kielder.
- 8.52 It was further suggested during the consultation that a ‘Big Five’ could be established for Kielder (mimicking the African safari big five species). These could be Red Squirrel, Deer, Badger, Bats and Osprey (or possibly raptors in general).

*MP5: Establish a Booking System for Events and Tours – Promote through Accommodation and Existing Visitor Centres, TICs, Etc*

- 8.53 If the programme of guided wildlife experiences is to be successful, an efficient booking system is essential. In the longer term, this could be part of a wider booking system for all activities at Kielder. In the short term, it could be provided by the private sector, possibly with support from the partnership. Key features would include:
- Bookings can be made on-line, at TICs and information centres, at Kielder Castle, Leaplish, Tower Knowe and at accommodation providers, and by telephone
  - Point of sale materials to be provided to TICs, accommodation providers, etc
  - Payment by debit/credit card mechanism to be included

Table 8: Develop Partnerships for Delivery and Marketing

Ref	Task	Description	Cost Estimate	Delivery Partners
DP1	Conservation management partnership	A partnership of the land owning and managing organisations working together to co-ordinate land management for wildlife	Nil	FC, NWL, CT, NWT, NNPA
DP2	Individual partnerships for each wildlife watching proposal	Delivery partners working together on each recommendation	Nil	Various
DP3	Nature tourism marketing group	KP members, providers of wildlife experiences and accommodation providers in the Kielder area working with external partners (Northumberland ATP, ONE Tourism Team, etc) to promote wildlife tourism at Kielder	Nil	KP lead



*DP1: Conservation Management Partnership*

- 8.54 There is already a working relationship between landowners and other interested parties at Kielder on conservation management. It is recommended that this partnership be formalised and that it brings together the land owners and managers on a regular basis to plan and manage delivery of the land management strategy and tasks in this strategy. Individual partners would take a lead on the LM tasks and the partnership would co-ordinate, monitor and plan activity.

*DP2: Individual Partnerships for Each Wildlife Watching Proposal*

- 8.55 Each recommended task should have its own delivery partnership as proposed in the tables above. These should be supported and co-ordinated by the Kielder Partnership, which should have overall responsibility for managing delivery.

*DP3: Nature Tourism Marketing Group*

- 8.56 A wildlife tourism marketing partnership should be established to plan and deliver marketing and promotion activity. This should include the Kielder Partnership, Managers of wildlife attractions (Forestry Commission, Environment Agency), operator(s) delivering the guided wildlife experiences, Forestry Commission (which will license the former) and interested tourism/accommodation businesses. The Bellingham and Redesdale business associations should also be invited to participate.

**Resources**

- 8.57 Indicative costs for implementation of the actions are shown in the tables above. In many cases, it will be possible to include actions within/as part of existing development already included in the Investment Plan. The partners should seek to achieve this wherever possible.
- 8.58 In addition to finance, an additional human resource is required to manage the process. The consultants do not believe that this can be achieved within the existing management resource and therefore a new post is proposed, for the short term, three year development phase (see 9.7). The Kielder Wildlife Tourism Officer would be responsible for overseeing delivery of the actions recommended in this report over a three year period.
- 8.59 There is no funding available in the existing Kielder Partnership budget for such a post and so it is recommended that external funds for the post and for setting up a wildlife tourism reservations system are sought from:
- LEADER
  - Other external sources including Landfill Tax and Lottery

## 9 IMPACTS

- 9.1 Estimating the likely impacts of developing wildlife tourism at Kielder as recommended in this report is challenging in the absence of any baseline data. The only reliable baseline information is that 130 people participated in guided wildlife experiences in 2009 and approximately 300 in wildlife events overall.
- 9.2 An estimate of the potential economic impact is made here using the same approach taken in estimating the potential economic impact of developing nature-based tourism in the North East region. It assumes that:
- 6.8% of existing visits currently have 'nature study' as an activity undertaken on the trip<sup>9</sup>
  - The national average is 8.1% and the highest 'penetration' is 11.8% in South West England
  - The main constraint is a lack of high quality wildlife watching experiences and promotion and information on where and when to watch wildlife
  - The recommendations in this report will address this constraint as well as generally improving wildlife at Kielder Water and Forest Park
- 9.3 It is assumed that implementing the action plan described in this report will at least bring Kielder up to the national average penetration but could (since it will create a high quality and unique offer) reach similar levels to those achieved in South West England.
- 9.4 Table 9 shows the likely impacts on existing visitor numbers which would accrue from additional spending generated.

Table 9: Existing and Potential Impacts Based on Existing Visitor Numbers

	Existing	Existing Wildlife Tourism Spend (6.8%)	Low Growth Estimate for Wildlife Tourism Spend (8.1%)	High Growth Estimate for Wildlife Tourism Spend (11.8%)
Day visits	196,000	13,328	15,876	23,128
Staying visits	15,000	1,020	1,215	1,770
Total visits	238,000	16,148	19,278	28,084
Spending	£6,730,000	£457,650	£545,000	£794,140

Sources: Kielder Economic Impacts Study, 2008, Genecom for the Kielder Partnership and North East England Nature Based Tourism Scoping Study, 2009, Bowles Green Limited for One North East

- 9.5 In addition, developing and promoting wildlife tourism would attract additional visits to Kielder, including:
- Additional day visits, mostly from within the North East region
  - Additional visits from tourists staying in adjacent sub-regions – especially Hadrian's Wall and the Northumberland Coast
  - New staying visits to Kielder and to Northumberland

### Targets for Growth

- 9.6 Without reliable data on how many people are currently visiting Kielder to watch wildlife, it is difficult to make meaningful targets. It is therefore recommended that future visitor surveys are designed to inform such a baseline. In the meantime, it is assumed that current

<sup>9</sup> See North East England Nature Based Tourism Study which quotes data from the United Kingdom Tourism Survey. In reality, this figure is probably on the high side for Kielder, but cannot be proven as no relevant data exists

market penetration is the same as that for the region (i.e. 6.8% of all visits or 13,328 day visitors, 1,020 staying visitors spending £457,650).

9.7 Targets for growth are based on market penetration rates achieved elsewhere, where wildlife tourism is marketed more effectively. Two stages of development are proposed:

- Short term (2-3 years) - implementing the recommended actions, to make wildlife watching more accessible to visitors
- Medium term (4-7 years) – promoting wildlife watching at Kielder

9.8 The suggested targets are:

- Short term (by year 3) - 15,876 day visitors and 1,215 staying visitors spending £545,000
- Medium term (by year 7) – 23,128 day visitors and 1,770 staying visitors spending £794,140

## APPENDICES

### Appendix 1: Summary of Consultation

A briefing meeting took place on 6<sup>th</sup> October. Steering Group Members Neville Geddes, Mike Pratt and Elisabeth Rowark attended and provided a detailed briefing on the project.

An interim presentation of the research findings and analysis was made to Steering Group Members Elisabeth Rowark and Mike Pratt and then to the Big Picture Meeting, both on 11<sup>th</sup> November.

Interviews/telephone consultations have been undertaken with the following; consultation will be on-going throughout the work:

- Tom Dearnley, Forestry Commission
- Neville Geddes, Forestry Commission
- Richard Gilchrist, Forestry Commission
- Malt Iden, Forestry Commission
- Duncan Hutt, Northumberland Wildlife Trust
- Anthony Johnson, Northumberland Wildlife Trust
- Ann Lewis, Environment Agency
- Stuart Pudney, Northumbrian Water
- Philip Spottiswood, Forestry Commission
- Peter Cockerill, Calvert Trust
- Caroline Stewart, Northumberland Tourism
- Duncan Wise, Northumberland National Park Authority
- Phillippa Mitchell, Save Our Squirrels Project
- Jon Monks, Shepherd's Walks
- Martin Kitching, Northern Experience Wildlife Tours
- Shona Kendrick, Kielder Partnership

In addition, the consultants attended a meeting of the Kielderhead Advisory Group at Kielder Castle on 13<sup>th</sup> October. They have also made a series of site visits.

Telephone interviews have been held with a sample of 12 visitor-related businesses in the Kielder Area, as follows:

- Bridgeford Farm, Bellingham
- The Bay Horse Inn, West Woodburn
- Otterburn Tower Country Hotel, Otterburn
- Eals Lodge, Tarsset
- The Blackcock Inn, Falstone
- Brandybank House, West Woodburn
- Hawkthirst Adventure Camp, Kielder Water
- Byrness Hostel, Byrness
- Coachman & Stables Cottages, Wark
- Larch Cottage, Ridsdale
- Kielder Cottage, Kielder Water
- Buteland Bothy, Bellingham

## Issues Arising from the Consultation

A number of issues and opportunities were identified during the consultation, as follows:

- Kielder is a robust landscape; large numbers of people can be accommodated with relatively few environmental impacts
- Much of Kielder is a mono-culture which does not give rise to high species diversity
- Aquatic nutrient levels are low meaning that the reservoir does not support abundant wildlife
- As a result, Kielder will never rival, for example, the Northumberland coast as a wildlife tourism destination
- However, there are a number of species and habitats that provide watching opportunities (osprey, red squirrels, bats, owls, flora)
- Most of the wildlife watching opportunities at Kielder require some form of management to make them work
- The existing partners have considerable expertise and knowledge of the wildlife present, its management and of showing nature to visitors. However capacity is very limited resulting in little existing provision (interpretation at Kielder Castle and Salmon Hatchery, hides, small number of events)
- Accommodation providers report high demand for wildlife watching and, beyond leaflets and the Partnership website, little information about where visitors can see wildlife; a majority feel that half-day wildlife safaris would be popular and would be happy to promote these to their guests
- A number of proposed and possible developments were suggested, including:
  - Improved facilities for watching red squirrels
  - Improved facilities for viewing flora (meadows and mosses)
  - Managing the shoreline at Bakethin more positively for wildlife
  - A circular nature trail at Bakethin
  - Nature trails in the wooded cleughs (river valleys)
  - Constructing an artificial badger hide in a manageable location populated with RSPCA rescue badgers
  - Tree top walk/canopy walkway
  - Bird hide with one way glass & feeders
  - Increase capacity of bat, squirrel and deer walks
  - Regular wildlife safaris
  - Webcams relaying images back to a single point
  - Increase price of existing events to a more commercially viable level
  - Run night time tours for sky and forest sounds
  - Re-design of Leaplish area landscape; incorporate nature watching opportunities here
  - Upper North Tyne Valley is a contrasting landscape which could be part of a package
  - Link to Bellingham Heritage Centre
  - Sidwood area could also be promoted
  - How can the local community generate benefits from the project?
  - Need to retain the sense of tranquillity

## Database of Contacts

An up-to-date contacts list for wildlife tourism at Kielder is supplied separately as an excel document.

## Appendix 2: Nature Tourism Market Segmentation

This paper, which summarises nature tourism demand, was produced by Catherine Flynn for One North East in Spring 2009.

### 1. BACKGROUND

This paper is aimed at people working in the environment sector, with little or no experience of tourism or marketing. It introduces the concepts of market segmentation and niche marketing, and suggests some potential segments for a nature based tourism marketing campaign. The segment information is taken from One North East's Tourism Market Segmentation Project, which was designed to look at the tourism market as a whole, rather than the potential market for nature based tourism.

A number of approaches to market segmentation are possible, for example based on life stage or drive times. The Tourism Market Segmentation Project uses two approaches, based on values and behaviours (see sections 4 and 5). This paper recommends key segments for a nature based tourism project, using those two systems. Using the behaviour-based system, these are:

- Explorers and Rural Hikers, especially for Northumberland
- Go for Its, for Tees Valley, and for activity based holidays elsewhere in the region
- Creatures of Habit and Family Sightseers, as part of a general interest holiday

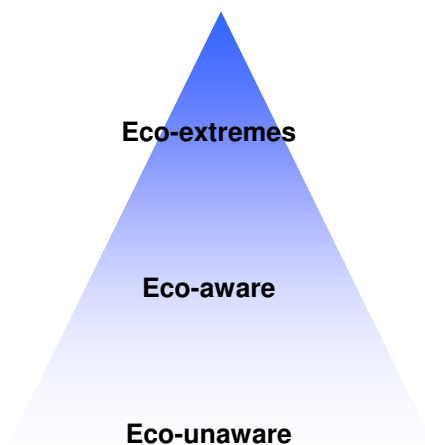
Using the ArkLeisure system, key segments are:

- Traditionalists
- Cosmopolitans
- Discoverers

This paper provides some key insights into existing nature based visitors to the North East, drawn from the 2008 regional Leisure Visits Survey, particularly in relation to their levels of spending.

### 2. INTRODUCTION TO NICHE MARKETS

Most niche markets can be understood by using the triangle diagram below. The same principles can apply to other niche markets, for example mountain biking.



At the top of the triangle are the 'eco extremes'. These are people with a high interest in the natural environment. However, they are not considered to be suitable targets for a nature based tourism campaign because they are few in number, their economic impact is relatively low (although they may invest in expensive equipment, this is likely to be in their "home" region), and they are unlikely to be influenced by pro-active product development and marketing. In fact, they are likely to be deterred by promotional activity.

At the bottom of the triangle are people who may have a high economic impact and be influenced by tourism marketing, but are uninterested in the natural environment.

In the middle are people who have a casual interest in the natural environment and are also likely to contribute to the local economy. They are likely to enjoy the countryside and learning about wildlife and habitats, as part of a more general holiday. They are likely to spend money in local shops, restaurants and other types of attraction. Therefore, marketing to the "casuals" should locate nature based tourism in the context of a wider holiday, stressing the variety of activities available within a compact area.

### 3. INTRODUCTION TO MARKET SEGMENTATION

Market segmentation is an essential tool which allows marketers to understand and communicate with different types of customers. Understanding the way your product fits with the needs of your target market means that scarce resources can be used efficiently, by targeting the most productive segments, rather than using a scatter gun approach.

**For example:**

- Does your target segment need a fully packaged experience, or do they prefer independent activities?
- Are the right services available locally (eg accommodation and places to eat and drink)?
- Will your target segment be able to identify with the people featured in your promotional material?
- Are you using the most effective media?

Also, bear in mind that in tailoring your product to meet the needs of a particular segment, you may alienate others. For example if your promotional material features families with young children you may well put off older couples who are looking for peace and quiet.

#### **Tourism Network North East's Market Segmentation Project**

In 2007/08 Tourism Network North East commissioned Arkenford Ltd to conduct research to segment both its existing visitors and potential visitors within the UK. Three approaches were used:

- **Behavioural segmentation** – a bespoke segmentation of existing visitors to the North East region, based on what people do while visiting the region. This approach is more suitable for informing campaigns and media buying.
- **Arkleisure segmentation** – a tourism segmentation system developed by Arkleisure, initially for VisitBritain and now used widely by tourism destinations and attractions across the UK, based on consumers' long term values. The research shows the importance of each segment among existing visitors to the North East region, and nationally. This approach is most suitable for designing high-level messages and images.
- **Postcode segmentation (CAMEO)** – suitable for direct mail campaigns.

#### **4. BEHAVIOURAL SEGMENTATION SYSTEM**

The segments:

##### **Eventers**

This segment is visiting the North East for a specific occasion or event, which may be a family event such as wedding or a public event such as a music festival. The segment covers a wide variety of demographics as they are driven by the event. They are not particularly active when in the North East, and do not stay long, however they tend to stay in commercial accommodation and so do bring some revenue to the economy. They are likely to stay in areas with a large population base, therefore are important in Tees Valley and Tyne and Wear.

##### **Go for Its**

This is a very active segment that seems willing to give many things a try. They are young with a male bias, often travelling in an adult only group. They are interested in the countryside where they can undertake activities such as sports and serious walking. They are more likely than average to stay for a longer break (4 – 6 days) and stay in hotels or B&Bs. They tend to choose their holidays based on experiences rather than destinations – an important consideration in marketing to this segment. They are active at night as well as during the day and prefer to stay in areas with good nightlife.

##### **Party People**

This segment is all about nightlife and partying. Exploring towns and cities, visiting bars and clubs and partying all night is the principle reason for visiting North East England. This is the youngest segment and 91% are in the young/no children life stage. The majority stay in hotels, and they stay in the area around their accommodation rather than exploring the region.

##### **Explorers**

This segment consists of people that are visiting North East England to explore the region and visit the heritage attractions on offer. They are new to the area, wanting to experience something new in a destination they have not visited before. A high proportion is over 55 and they are likely to be travelling as a couple. They prefer to stay in guesthouses or B&Bs, and are likely to be found in Northumberland or Durham.

##### **Rural Hikers**

This segment likes the countryside and scenery, and especially the activities they can do in the countryside such as serious walking. They choose North East England because it is somewhere new for them. They tend to be over 45 and travel as a couple. Although short breaks account for the majority of trips, rural hikers are more likely than other segments to be staying for a week or longer. They prefer to stay in guesthouses or camping/caravanning, and are likely to be found in Northumberland.

##### **Creatures of Habit**

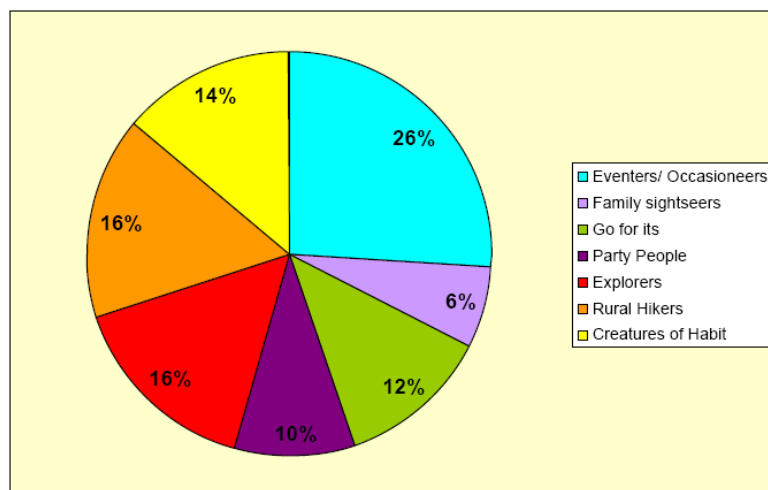
This segment chooses North East England because it is a familiar location. They like to explore towns and countryside as well as visit historical and heritage attractions, and are looking to slow



down and rejuvenate. They are likely to be over 45 with older or no children. Although short breaks are the most common, this segment is more likely than others to stay for 7 nights, often in self catering or camping accommodation.

### Segment size

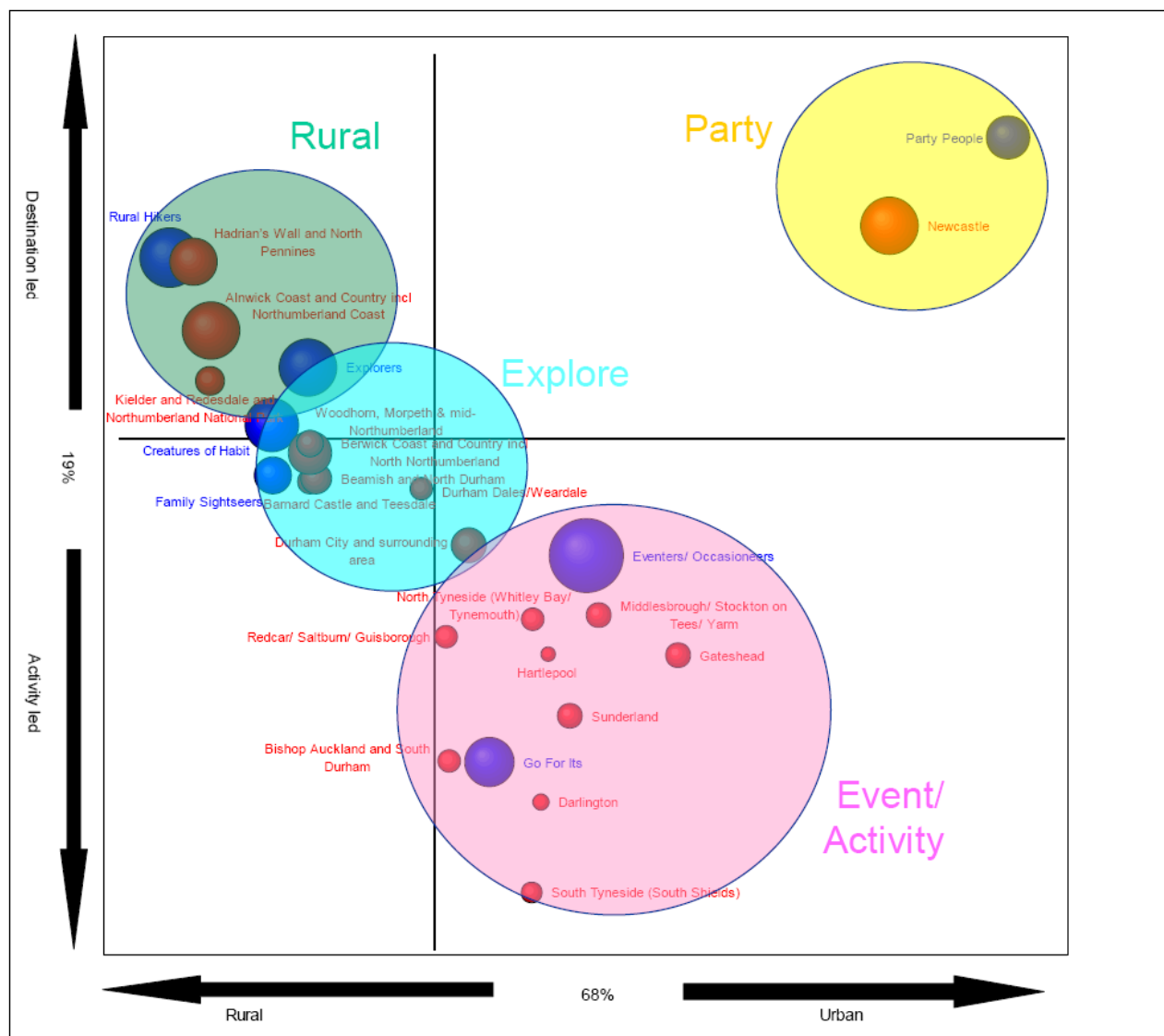
The chart below shows the volume of each segment, among existing visitors to the North East. The most significant segments are the Eventers, Rural Hikers and Explorers.



### Interest in Nature Based Tourism

Further analysis has been undertaken to match the behavioural segments to particular areas within the region. The factors used in this analysis are the type of destination (urban/rural), and the type of experience (attraction led/destination led). On the chart below, the blue circles represent the segments, with the size of the circles representing the size of the segment. The red circles represent destinations, or areas, with the larger circles representing the destinations which were more popular with our sample.

This shows a clear fit between the Rural Hikers and Explorers, and Northumberland (Hadrian's Wall, North Pennines, Alnwick, Northumberland Coast, Kielder and Redesdale and the Northumberland National Park). This cluster is interested in the destination. Similarly, there is a fit between the Creatures of Habit and Family Sightseers in Northumberland and the rural parts of Durham (Woodhorn, Morpeth, Central Northumberland, Berwick, North Northumberland, Beamish and North Durham, Barnard Castle and Teesdale). This cluster tends to be slightly more activity-led. Finally, there is an opportunity to target the Go For Its with the South Durham/Tees Valley product. This could be a suitable market for Salholme in the future as they are interested in trying new experiences, and are also less interested than some of the other segments in an unspoilt natural environment.



### Priority Segments

Four criteria were developed to evaluate the most attractive segments for a North East nature based tourism project. These are: spend per stay per group; group size; "three year value" (which takes account of repeat visits) and likely interest in nature-based tourism. [\*\*\*Why some in yellow?]

	Average spend per stay per group	3 year value	Volume	Interest in Nature Based Tourism
Eventers	£557	£1,209	26%	Low
Family Sightseers	£887	£1,491	6%	Medium
Go for Its	£1,677	£7,497	12%	High – Tees Valley
Party People	£804	£1,736	10%	Low
Explorers	£777	£916	16%	High – N'land
Rural Hikers	£759	£979	16%	High – N'land
Creatures of Habit	£768	£1,521	14%	Medium

This analysis suggests that the most attractive target segments are:

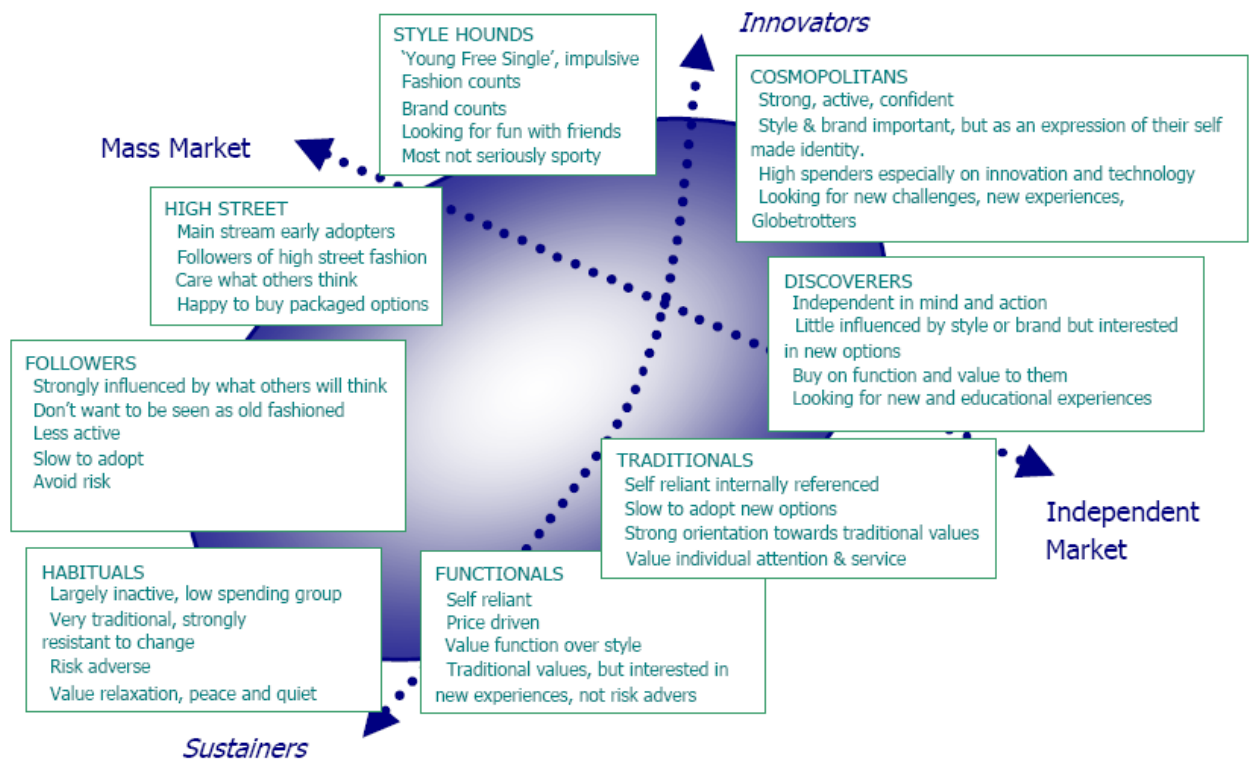
**Explorers and Rural Hikers**, especially for Northumberland. Although they are not the highest spending groups they are numerically significant and have a high interest in rural areas. This segment will respond to marketing activity which focuses on the destination, eg unspoilt (but welcoming) landscapes.

**Go For Its**, for Tees Valley, and for activity based holidays elsewhere in the region. Their three year value is very high. Promotional activity targeting this segment should focus on exhilarating activities such as extreme sports or hiking in rugged/remote areas.

**Creatures of Habit and Family Sightseers** may also be interested in nature based tourism, but probably as part of a general interest holiday incorporating a range of rural and urban experiences.

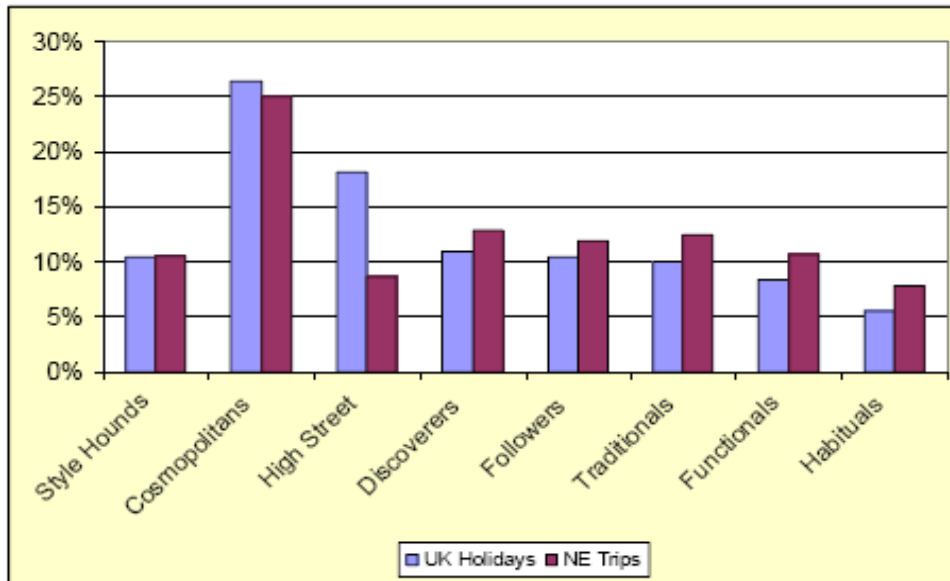
## 5. ARKLEISURE SEGMENTS

The diagram below shows the key characteristics of the Arkleisure segments.



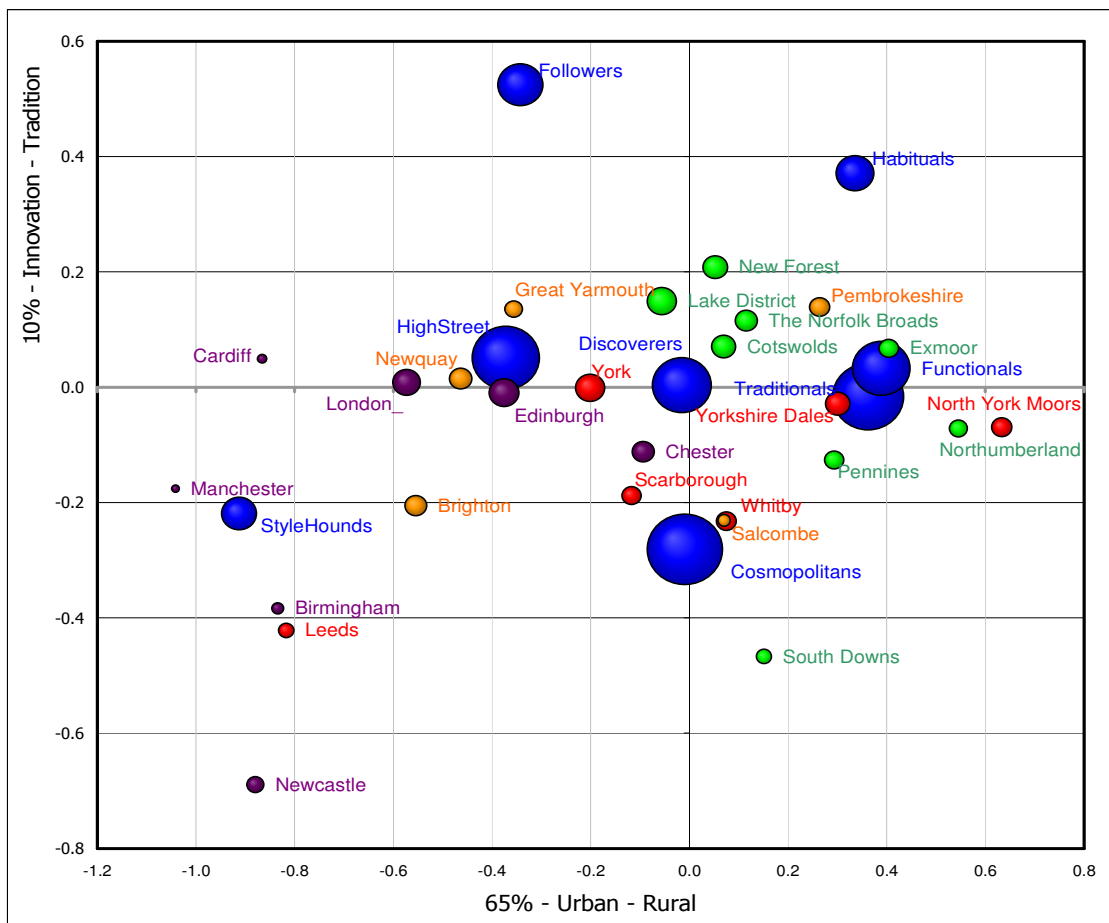
### Segment size

This chart shows the size of the segments, for trips to UK destinations and for trips to the North East. For example, High Streets account for 18% of UK holidays, but only 9% of trips to the North East. This shows that Cosmopolitans are the largest segment, both in the North East and in the rest of the UK. High Streets are a significant segment in the UK, but are under-represented in the North East. Discoverers and Traditionals are more common in the North East than in the rest of the UK.



### Potential interest in rural areas

As part of a separate project, Arkenford have undertaken an analysis of the segments' potential interest in rural and urban destinations (see chart overleaf). This shows that Functionals, Traditionals and Habituals are the most likely groups to be interested in rural areas. Traditionals and Cosmopolitans do not show a preference for either rural or urban destinations.



### Prioritising the segments

Five criteria have been used to prioritise the segments. These are spend per group per trip, three year value (which accounts for repeat visits), current segment size (ie proportion of existing visitors to the North East), potential segment size (ie proportion of all UK holidays), and likely interest in nature based tourism.

Segment	Spend per group per trip	Three year value	Size current	Size potential	Interest in rural destinations
Cosmopolitans	£861	£2,152	25	26	Medium
Discoverers	£818	£1,390	13	11	Medium
Traditionals	£726	£1,161	13	10	High
Functionals	£554	£886	11	9	High
Habituals	£418	£753	8	6	High
Followers	£1,151	£2,532	12	10	Low
High Streets	£990	£2,278	9	13	Low
Style Hounds	£961	£1,729	10	10	Low

This analysis suggests that the following market segments offer the best potential for a nature based tourism project:

**Traditionals** are interested in rural experiences, and 13% of existing visitors fall into this segment. Their expenditure rates are slightly lower than Discoverers', however they are easy to target through advertising and brochures. This segment should respond well to campaigns promoting established areas such as the Northumberland Coast.

**Cosmopolitans** are a large and high spend segment who are interested in new activities. Based on their interest in innovation, they may be a suitable target for new attractions, such as Salholme, or alternative propositions, such as urban wildlife.

**Discoverers** are interested in new experiences and activities, and are likely to be interested in "undiscovered" areas. Spending patterns are around average, and they already make up a reasonable proportion of visitors to the region. However, they are unlikely to respond to traditional promotional activity such as advertising or direct mail.

**Functionals** and **Habituals** have a high interest in rural destinations, but have low spending patterns. These segments are likely to be regular visitors, and are more interested in information than in inspirational campaigns.

## 6. NATURE-BASED TOURISM IN NORTH EAST ENGLAND

A regional Leisure Visitor Survey was undertaken in 2008. While this survey was not designed to provide information specifically for nature-based tourism, it is possible to examine a small proportion of "nature-based tourists", ie those who came to the region specifically for its nature based offer. As shown below, 15% of leisure visitors said the main reason for their visit was connected to nature. This was higher (23%) in coastal areas.

Location Type				
Main reason for visit	All %	Coastal %	Urban/ City %	Rural %
Base	2408	611	1116	681
Walking (less than 2 miles)	2	3	1	1
Nature reserve/wildlife park/ bird watching	1	2	1	1
Visiting parks and gardens	8	2	8	14
Visiting a beach	4	16	0	0
Total	15	23	11	16

Compared to other visitors, Nature Based Tourists are more likely to be:

- 'Functionals', 'Cosmopolitans' or 'Discoverers'
- From within the North East region (Yorkshire and the North West were the only other significant regions)
- Day Visitors - those who stayed overnight were likely to stay in self catering cottages, campsites or caravan sites, in market towns or small rural/coastal villages

On average Nature Based Tourists on a day trip spent £13.67 per person per day, slightly lower than the average for all leisure day visitors which was £14.71. Overnight Nature Based Tourists spent £36.23 per person per night, including £28.29 on accommodation. Again this is slightly lower than the average for overnight leisure visits, which was £42.39 per person per night, including £30.91 on accommodation.

This data shows that, at the moment, "Nature Based Tourists" have expenditure patterns which are below the regional average. Other types of visitors, such as those on a city break, tend to spend more on shopping and entertainment, and to stay in hotels rather than self catering accommodation. However, this analysis is based only on people for whom nature based tourism was the main reason for their visit. It has not been possible to produce figures for people who visited for another main reason (for example to visit friends and relatives), but who nevertheless enjoyed the region's natural environment as part of their trip.

## 7. CONCLUSIONS

The term "Nature Based Tourists" embraces a wide range of visitors, from the "extreme" wildlife watcher to the "casual" visitor. The "casual" visitors are likely to deliver the greatest economic benefit to the region, as they will stay longer and enjoy nature based activities as part of a wider break which also includes shopping, eating out and visiting the region's cultural and heritage attractions.

Existing Nature based tourists in the North East tend to spend less than the average visitor. They are predominantly local residents on day trips, from the Functional and Habitual segments, although some stay overnight in self catering accommodation. Therefore, in order to improve the economic impact of nature based tourism, any new development or marketing activity should be designed to fit the needs of new, high spend markets from outside the region.

Understanding different market segments will allow us to invest in all aspects of our natural environment in a way that meets the needs of our future visitors, including infrastructure and services, as well as wildlife sites. It will also help us to understand how to communicate with our target segments – what media they prefer and what messages and images they will respond to.

Using the behavioural segmentation system, there is potential to attract 'Explorers' and 'Rural Hikers' to Northumberland, and 'Go For Its' to Tees Valley based on events.

Using the Arkleisure system, the Traditionals and Discoverers offer the best potential for attracting new, high yield visitors. Cosmopolitans are an attractive and high spending segment, but greater investment in the product is needed in order to meet their high standards.

### Appendix 3: Summary of Best Practice in Nature Watching

This summary of best practice experience considers methods for watching the following:

- |                 |             |
|-----------------|-------------|
| ○ Birds         | ○ Bats      |
| ○ Red squirrels | ○ Flora     |
| ○ Deer Badgers  | ○ Fungi     |
| ○ Otters        | ○ Geology   |
| ○ Deer          | ○ Night sky |

#### *Watching Birds*

Birds are probably the most commonly watched group. There are a number of different approaches which have been adopted to suit the location of the birds being watched. Examples include:

- Nature reserves with hides
- Cruises – to cliff nesting colonies and to view pelagic birds
- Hides and telescopes set up to observe raptor nests
- Remote viewing by camera
- Providing information to enable people to ‘self-guide’ around good bird habitat
- Watching common birds

#### Nature Reserves with Hides

There are many examples of this approach in North East England and elsewhere. Saltholme has a state-of-the-art, environmentally-friendly visitor centre with catering, retail, education and meeting facilities, plus a network of routes and hides, together with CCTV feeds to plasma screens in the visitor centre. It is a good example of up-to-date thinking on this approach (see [www.rspb.org.uk/reserves/guide/s/saltholme](http://www.rspb.org.uk/reserves/guide/s/saltholme)).

Out of the region, the Scottish Seabird Centre at North Berwick is the market leader in the UK (see [www.seabird.org](http://www.seabird.org)). In addition to visitor facilities which are similar in quality to Saltholme, the centre offers live CCTV feeds from seabird colonies and other sites on nearby islands and on the mainland, offers boat trips, and has recently become involved with cetacean watching, including experimenting with live audio feeds from remote hydrophones.

#### Cruises and Self-guided Boat Trips

Many businesses and NGOs operate cruises to watch birds and other wildlife. Most are coastal, however, examples of inland cruises include tours by electric boat the ‘Helen of Ranworth’ which runs 45 min, guided boat trips at Ranworth Broad in Norfolk, linking to the Norfolk Wildlife Trust visitor centre and other similar examples on other Broad (see <http://www.broads-authority.gov.uk/visiting/activities/boat-trips-1.html>). Overseas, there are guided birding boat trips in inland many locations, for example the Danube Delta. There are also self-guided canoe trips along rivers which are good for wildlife watching – for example in various parts of North America, Finland, etc.

#### Hides and Telescopes set up to observe Raptor Nests

The RSPB, Forestry Commission and others have established viewing hides and telescopes with staff and/or volunteers on hand to talk to visitors at nest sites of various raptors, including osprey, hen harrier, golden eagle and peregrine falcon.

Viewing arrangements for the breeding Ospreys at Bassenthwaite Lake are a fine example (there are now over a dozen osprey watch schemes in the UK); in the region of 100,000 people visit each year. The facilities are:

- A staffed observation post with telescopes and volunteers from which visitors can look across Bassenthwaite Lake to the nest site
- The viewing point is serviced from an existing Forestry Commission car park with toilets where there is also a franchised catering operation
- CCTV live feed beamed into Whinlatter Forest Visitor Centre, with additional interpretation including panels and a reconstruction of an osprey nest

#### Remote Viewing by Camera

This technique has been used at a number of sites for many years now. One of the first was to view cliff nesting birds at South Stack RSPB reserve near Holyhead. CCTV is now frequently used to enhance a viewing opportunity for example at RSPB Saltholme, the Scottish Seabird Centre, Manx Shearwater nests on the Island of Skomer (Pembrokeshire) and the Bassenthwaite Ospreys.

#### Providing Information to Enable People to 'Self-guide'

The main problem for novice birdwatchers is finding information on when to visit particular sites and what they might expect to find there, since much of the available information is targeted at experts and tends to omit key facts which are general knowledge to the expert. The Birds of the Humber project addressed this by publishing a bird watching pack containing the following:

- Booklet guide to bird watching in the area containing information on:
  - A summary of bird movements in the area through the year
  - Some basic information about how to watch birds (equipment, identification basics, etc)
  - Managed and informal places to watch birds – what habitats are there and the kinds of birds that might be found there at different times of the year
- An identification list of birds which can be seen around the estuary, with a guide to rarity (common, scarce, rare)
- A series of 12 self-guided 'bird walks', with a recommended season(s) and notes on what birds visitors might expect to see in different habitats on the way

Birdwatching booklets published by the Northumberland Coast and North Pennines AONBs provide this information in North East England.

Trails, such as the Mid Wales and Galloway Red Kite Trails (see <http://www.gallowaykitetrail.com>) are effective ways of attracting and managing visitors around a destination.

#### Watching Common Birds

Opportunities to see relatively common birds can be a big attraction. Examples are:

- During the 1990s, the National Trust established a hide and feeding station for greater spotted woodpeckers at Clumber Park in north Nottinghamshire; demand from visitors took site managers by surprise
- At Wyre Forest in Shropshire the Forestry Commission has installed a 'bird wall' in its education centre. One wall has a number of bird hide style windows with one way reflecting glass. Outside are shelves and feeders which are stocked with food. Users of the education centre can see woodland birds literally inches away



- Dawn chorus walks are popular. Such walks organised at Kielder and Allenbanks include an introductory talk and a post dawn walk followed by a cooked breakfast

### *Watching Animals*

There are numerous opportunities to watch animals in the UK, including red squirrel, deer, badger, otter, seal and cetacea (whales and dolphins). Some examples are summarised here:

#### Red Squirrels

The National Trust has a number of sites at which it encourages visitors to watch red squirrels, including its Wallington estate in Northumberland. Here there is a hide overlooking a feeding station and a short circular walk through woodland where red squirrels are present (see [http://www.nationaltrust.org.uk/main/w-red\\_squirrel\\_walk-wallington.pdf](http://www.nationaltrust.org.uk/main/w-red_squirrel_walk-wallington.pdf)).

Red Squirrels in South Scotland is an area based red squirrel conservation project in the Borders and Dumfries and Galloway Regions, which is similar to the Save our Squirrels project, co-ordinated by the Northumberland Wildlife Trust in North East England. However, this project has been established for longer and has added promotion of squirrel watching sites to its activities. Its website lists and describes 20 locations where people can watch red squirrels in southern Scotland, including nature reserves, private estates and guided experiences.

#### Deer

The Forestry Commission has created a short circular walk to a deer observation platform at Boulderwood in the New Forest. The observation platform is raised and overlooks an area regularly used by Fallow Deer for grazing.

The Atholl Estate in Scotland offers a variety of tours to watch deer, including:

- Land Rover safaris
- Walks with a gamekeeper
- Guided pony treks

#### Badgers

There are several badger watching operations around the country. Some are temporary and consist simply of a guided walk to a badger sett, but others are more sophisticated and have facilities to support the experience.

Devon Badger Watch, located near Tiverton is a good example (see <http://www.devonbadgerwatch.co.uk/>). Visitors pay £10 (adults) and £7 (children 7 – 15yrs) for an evening's badger watching, which consists of:

- Welcome, information and introductory talk at the visitor centre
- 450m walk through woodland to a specially constructed sunken hide
- 1½ hours watching badgers with guide and taped commentary
- Live CCTV feed into the hide from a nearby Tawny Owl nest
- Return to visitor centre with opportunity to talk more with guide, buy souvenirs, etc

#### Otter

The Otter Trust had a reserve at Bowes Moor but this closed in 2006 after 10 years in operation. The Trust struggled to attract sufficient numbers of visitors to justify opening to the public.

Wildlife tour operators have had more success in providing guided otter watching experiences and some do this in North East England. Though visitors on guided otter walks often don't see otter, they do find evidence of the creatures and in these cases, the perceived rarity of otters appears to overcome any sense of disappointment. The guided tour approach appears to be a better financial model than the otter visitor centre.

### *Flora*

Self-guided or guided walks are the most common methods of showing people flowers, and tree trails perform the same job in woodlands. More imaginative methods include:

- Tree top walks – Salcey Forest Treetop Walk in Northamptonshire is a good example – 300m long and 2m wide, wheelchair access is possible and gives visitors a different perspective on trees and woodland, plus the opportunity to see rare treetop living butterflies (see <http://www.rnrp.org/default.asp?PageID=93>)
- The annual 'Flora of the Fells' festival, run by the Friends of the Lake District consists of a programme of spring flower walks and events and attracts over 2,000 participants on 160+ events (see <http://www.floraofthefells.com/>)

### *Geological Features*

A variety of methods have been used to interpret geological features and heritage. Some examples of good practice are as follows:

- Knochan Crag, Scotland – imaginative outdoor visitor centre with interactive interpretation, wider 'Rock Trail' with use of outdoor sculpture to house interpretation
- Réserve Géologique d'Haute Provence – museum at Digne uses art to interpret the local geology
- The North Pennines AONB Partnership has recently invested in a 'Georium' - portable boxes filled with sand and containing casts of fossils for use by children
- The North Pennines AONB Partnership recently worked with a local media artist and children from a school in Alston to make a film – 'Our Geopark' – and has worked with local artists and schools to create a strolling theatre production based around the social history of lead mining
- The Tees Valley RIGS Group has recently produced downloadable self-guided walk information for geological sites, including Roseberry Topping

### *Night Sky*

Astro Adventures of North Devon is an example of a self catering lodge operator using dark skies to attract business. The operator, located near Bradworth on Exmoor (one of CPRE's darkest places), has installed powerful, reflecting telescopes for guests to use, provides information on astronomy in the lodges and offers training course in astronomy. Prices for the lodges are from £230 to £550 per week. Promotion is via a website ([www.astroadventures.co.uk/](http://www.astroadventures.co.uk/)) and public relations activity which has achieved national media exposure.

### *Other*

Fungi guided walks are common, and lichen guided walks also take place around the country.

Bat evenings are organised at Kielder. At Allenbanks, the National Trust organises bat walks on a similar model to its Dawn Chorus bird walks. The evening starts with an introductory talk about the bats present in the wood followed by a walk. Guides have ultrasound detecting equipment that can pick up the sounds made by bats.