Bowles Green Limited

Tees Valley International Nature Reserve

Consultants' Report

July 2006

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EXECUTIVE SUMMARY

The RSPB is working with the Teesside Environment Trust to develop the Tees Valley International Nature Reserve (TVINR) as one of the North East's major tourist attractions. The 380 hectare reserve will have wetland and grassland habitats and it will attract many common and rare species, including bittern, marsh harrier and avocet.

TVINR will have the most expansive and sophisticated visitor facilities of any RSPB reserve in the country, including:

- Wild Bird Discovery Centre – an innovative low impact building with state of the art interpretation, close-up bird viewing and the largest environmental education facility in northeast England
- A specially designed wildlife garden, ecology-themed play area and picnic site
- Walkways and cycleways giving access to the reserve including hides and viewing points without disturbing birds
- A year-round programme of engaging events
- High numbers of staff and volunteers to engage with, entertain and enthuse visitors, bringing birds and wildlife to life

It will be on a par with the top wildlife attractions, such as the London Wetland Centre, Slimbridge and the Scottish Seabird Centre.

Developing TVINR will contribute to delivering aspects of many key regional and sub-regional policies and strategies, including:

- North East Regional Economic Strategy
- Regional Image Strategy
- North East Regional Tourism Strategy
- North East Regional Tourism Marketing Strategy
- Tees Valley Tourism Strategy
- Tees Valley Area Tourism Partnership Management Plan

TVINR will provide an opportunity to develop and promote nature tourism in the North East region based on a hierarchy of attractions:

- Iconic attractions – TVINR and the Farnes
- Anchor attractions – Alpine flora and birds in the North Pennines, Washington Wildfowl and Wetlands Centre, Castle Eden Dene Walkway, Drurridge Bay Country Park, Red Kites in Gateshead, red squirrels in Kielder Forest, etc
- Framework attractions – many smaller sites throughout the region

TVINR will attract visitors from a number of market segments, as follows:

- Day visitors travelling from Home
- Tourists staying in Tees Valley and adjacent sub regions
- Education
- Special interests – birdwatchers

TVINR is located close to a large population and estimates of the catchment population have been made as follows:

Segment	Sub-segment	Population
Day visitors from home	0-1 hour's drive time	873,962
	1-2 hour's drive time	4,174,714
Tourists	Making special trip	116,500
	Staying in Tees Valley	900,000
	Staying in adjacent sub-regions	9,700,000
	Transit	127,440
Education	School	164,160
Special interest	RSPB members living within 0-2 hours	116,500
	RSPB members living 2-3 hours	176,498
	RSPB members living beyond 3 hours	755,048
	RSPB groups making visits to TVINR	130 groups
	Other birdwatchers	750,000

Estimating visitor numbers is not a precise science and there are many variables. The three approaches were taken during this study:

- Considering visits to other attractions in the area
- Considering visits to comparable attractions elsewhere
- Making an estimate of market size and penetration

The top attractions in Tees Valley attract between 28,000 and 440,000 visits per year. Trends vary from attraction to attraction but demand appears to be strong. The top wildlife attractions in the North East attract between 20,000 and 158,000 visits per year. Washington, which has lower key facilities to TVINR attracts 72,000 visits and this without the route to market of 1,000,000 members that the RSPB enjoys.

The top RSPB attraction is Titchwell in Norfolk with 130,000 visits. Titchwell has similar habitats and species to TVINR but much more modest visitor facilities. Wetland centres at Slimbridge in Gloucestershire and Martin Mere in Lancashire both have similar catchments and visitor facilities to TVINR and attract 170-180,000 and 140-150,000 visits per year respectively.

The penetration analysis used modest penetration rates and estimated 118,000 visits per year.

The study estimates visitor numbers between 80,000 and 110,000 per year, with 54% being day visits from outside of the region and 7% being staying visitors from outside of the region.

Spending by visitors from outside of the region is estimated at between £1,958,448 and £2,394,216.

TVINR will create/support between 57 and 83 full time job equivalents and deliver a number of non financial benefits, as follows:

- 9,900 learning opportunities per year
- 63 training opportunities per year for 40 volunteers and 23 staff
- 850m^2 of floor space for community activities
- 5.5 kilometres of new walking routes
- 1.7 kilometres of new traffic fee cycle routes within the reserve
- 4.7 kilometres of new traffic free cycle routes linking the reserve into the cycle network
- 55 hectares of brownfield land restored
- A positive image for the Tees Valley and the region

1 INTRODUCTION

1.1 The RSPB is working with the Teesside Environment Trust to develop a green tourism facility based on a nature reserve of international importance on former industrial land at Saltholme in the Borough of Stockton on north Teesside. The RSPB will manage the site and its facilities once it has been developed.

1.2 The 380 hectare (1,000 acre) reserve is the largest wetland creation project in the north of England. Flower meadow and some wetland habitat have already been developed on the reserve since the discontinuation of industrial use. Major earth moving, landscaping of soil, clay and industrial waste is creating a mosaic of lakes, pools, grasslands and reedbeds which will become home to a spectacular variety of wildlife including birds, flowers, mammals and invertebrates.

1.3 In addition to migrating birds and the more common species, such as kingfishers, mute swans, grey herons, butterflies, water voles, dragonflies and wild flowers, it is anticipated that the new habitat creation will attract rare and illusive species to colonise the North East of England. Bittern, marsh harrier, bearded tit and avocet could all be regular nesting birds at Saltholme before long. Already in 2006 a number of rare migrating waders and wildfowl have attracted visiting birdwatchers and approximately 250 pairs of common terns are building nests on specially created islands.

1.4 The Tees Valley International Nature Reserve (TVINR) is an unusual project and location compared to most other RSPB reserves – close to a large urban population. This gives the RSPB an opportunity to take a different approach to nature reserve management and it plans to use TVINR to showcase birds and wildlife to large numbers of people.

1.5 To do this, the RSPB will develop the largest range and scale of facilities on any of its reserves in order to appeal to families and others who have little knowledge of wildlife as well as specialist birdwatchers; these will include:

- Wild Bird Discovery Centre – an iconic building providing state of the art interpretation, close-up bird viewing, the largest environmental education facility in northeast England and high quality visitor facilities, all in an innovative low environmental impact building
- A specially designed wildlife garden, ecology-themed play area and picnic site
- Walkways and cycleways giving access to the reserve including hides and viewing points without disturbing birds
- A year-round programme of engaging events
- High numbers of staff and volunteers to engage with, entertain and enthuse visitors, bringing birds and wildlife to life

1.6 Examples of similar wildlife attractions which have innovative interpretation and provide spectacular wildlife viewing include:

The London Wetland Centre, Barn Elms, London

1.7 The London Wetland Centre was developed on a former water treatment works at Barn Elms next to the Thames. An attractive visitor centre houses an art gallery, discovery centre, wetland laboratory , restaurant and shop.

There are walkways giving access to a number of hides overlooking various wetland habitats. Take the virtual tour at www.wwt.org.uk/visit/wetlandcentre/default.asp

Slimbridge Wetland Centre, Slimbridge, Gloucestershire

1.8 SLimbridgge, in Gloucestershire, was the Wildfowl & Wetlands Trust's first reserve. Recently refurbished it has a new visitor centre with a discovery centre, lecture theatre, viewing gallery and tower, shop and restaurant. A netrwork of trails give access to hides and viewing towers around the reserve. See www.wwt.org.uk/visit/slimbridge/default.asp for more details.

Scottish Seabird Centre, North Berwick, East Lothian

1.9 The centre is located on the clifftop at North Berwick in East Lothian. One of Scotland's 'five star attractions' the centre leads the world in remote wildlife viewing with webcams providing views of birds on islands in the Firth of Forth. The distinctive building also has a restaurant serving seafood and local produce. For more information, see www.seabird.org/the-centre.asp

1.10 The nature of the reserve will provide year-round interest. Indeed, the sheer number of birds which visit the reserve during the spring and autumn migrations and in the winter are both of significant interest to birdwatchers and a fantastic wildlife spectacle which will appeal to a family and more general audience. This means that visitor numbers will be more evenly distributed through the year than at visitor attractions in general and provide a much needed boost to tourism in the sub-region during the traditionally-quiet 'shoulder months'.

1.11 A feasibility study by The Market Specialists (September 2003) projected 100,000 annual visits to the reserve. The RSPB is currently preparing a bid for public sector funding support from One North East (ONE) via the Tees Valley Partnership and the European Regional Development Fund (ERDF). Following scrutiny of the 2003 visitor number estimate by the funding agencies, the current study has been commissioned to produce a further robust and transparent estimate of the likely economic impacts of the project. A copy of the brief is included at Appendix 1.

1.12 This report describes:

- Tourism strategy in Tees Valley
- Summary of demand research
- Estimate of economic impacts
- Operating budget for the TVINR
- Other impacts of the TVINR

2 STRATEGIC FRAMEWORK

2.1 A number of economic and tourism strategies and other policies/initiatives are significant and it is important that the TVINR development contributes to their delivery if it is to benefit from public sector funding support. In this section we consider the strategic fit of the project. The key strategies are as follows

- North East Regional Economic Strategy
- Regional Image Strategy
- North East Regional Tourism Strategy
- North East Regional Tourism Marketing Strategy
- Tees Valley Area Tourism Partnership Management Plan
- Stockton Tourism Strategy
- Other Issues

North East Regional Economic Strategy

2.2 The Regional Economic Strategy for the North East (RES) was endorsed by the government in 2000 after being prepared in the previous year. The vision of the strategy is to:

"…harness and enhance the human, cultural and environmental resources of the region so that, by 2010, the North East is vibrant, self reliant, ambitious and outward looking. To do so, we will raise the aspirations and profile of the region, making it more prosperous and more inclusive."

2.3 The strategy provides a framework for progress and One North East aims to make sure that activities are coordinated. There are a number of key themes which reoccur throughout the strategy. These are the North East as: a European region, culturally vibrant, having a more sustainable environment, having a more inclusive society, as being both diverse and welcoming, being healthier and safer and having cities, towns and rural locations working together.

2.4 The theme of the strategy most relevant to this study is the one concerned with a sustainable North East. A regional sustainable development framework will be used. This means that high and stable levels of economic growth and employment will be aimed for while also working to protect the environment, use natural resources sensibly and progress socially to meet the needs of all. A sustainable North East will be achieved through creating:

- A more sustainable environment;
- A more inclusive North East;
- A diverse and welcoming North East;
- A healthier and safer North East;
- Cities, towns and rural communities working together.

2.5 The environment of the region can play a part in its economic growth and development rather than be a barrier to it. The strategy highlights that increasingly more demands are being placed on the environment which means that this needs to be monitored, managed and, where appropriate, protected.

Fit with the Regional Economic Strategy

2.6 The TVINR fits well with the economic, social and environmental aims of the RES by creating and safeguarding jobs, creating new access to skills, creating new habitat which will be internationally important, providing opportunities for the urban community to engage with the natural environment and attracting visitors and spending into the region. It will also contribute to improving access opportunities to health improvement for disadvantaged communities by providing new access for walking and cycling.

Regional Image Strategy

2.7 The regional image strategy focuses on the profile and perceptions of the North East region, in particular, awareness about the region and its assets, and attitudes towards the region. These are low, especially among those that have never visited the region.

2.8 The aims of the strategy are therefore to:

- Increase awareness of North East England and its many superb assets
- Attract more leisure and business visitors to the North East
- Attract talented people to live and work in the North East
- Attract investment to the region
- Update and create positive perceptions of the region

2.9 To achieve these aims, ONE North East has invested in marketing and PR to promote the region. A permanent regional image strategy team has been set up and they have created a recognisable brand for the region. The paper states that the team will continue to research consumer perceptions of the region to gauge the success of this campaign.

2.10 Research shows that people who have previously visited the region are more likely to have positive opinions of it. Four major themes are highlighted in order to portray the common positive perceptions of the region. These are

- Coast and Countryside
- History and Heritage
- City Culture
- Innovative Business

2.11 A fifth strength, the characteristics of the people, would be promoted as a ‘cross-cutting theme’. It goes on to say that these characteristics have tested very positively with audiences throughout and beyond the UK and so it is hoped that ‘the new brand will provide a geographical locator to increase awareness of the North East and what the region has to offer.’

2.12 This brand is being used in campaigns to target specific audience groups at two levels. These are a main generic advertising campaign aimed purely at raising the profile of the region and a series of tactical campaigns with specific ‘calls to action’, which involve brochures and phone campaigns.

Fit with the Regional Image Strategy

2.13 TVINR and its people will provide strong images to support the 'coast and countryside' theme. Images of spectacular birds and flowers within a wider industrial setting will provide strong imagery of a region investing in its natural environment. By drawing its specialist audience to the site, the TVINR will directly help to counter the sometimes negative existing environmental image of the northeast.

North East Regional Tourism Strategy

2.14 The vision is to make the North East a desired destination which meets both tourist and business visitors' expectations. The strategy lays out a number of principles which will be used to achieve this, the most important of these for TVINR is:

"We will expand our tourism industry without putting our natural environment and built heritage at risk."

2.15 The strategy aims to add to the sustainable development of the North East. The document highlights the importance of the rural environment in attracting visitors to the area and how this must be conserved and managed. There are strategies for: rural areas, cities and large towns and tourism markets. There are ten aims as follows:

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

2.16 There are seven areas of activity and overall success depends on progression across all areas:

- Activities and attractions;
- Accommodation;
- Information provision;
- Infrastructure;
- Marketing, communication and branding;
- Business and workforce development;
- Planning and the environment.

2.17 In relation to visitor attractions, the strategy concentrates effort on raising the quality and attractiveness of existing attractions. New attractions will only be supported 'where there is a clear gap in provision'.

2.18 The strategy also identifies opportunities to develop tourism in both rural and urban areas of the North East and that this should be done in line with the Sustainable Development Framework for the region.

Fit with the Regional Tourism Strategy

2.19 The project fits well with the Regional Tourism Strategy as it will help to deliver on all of the ten aims. Work already commissioned by the RSPB (International Natire Reserve in the Tees Valley: Feasibility Study, TMS, 2003) and this study demonstrate that there is demand for, and a gap in provision of, sites of this type in the region.

North East Regional Tourism Marketing Strategy

2.20 The Tourism Marketing Strategy seeks to build on the three core themes of:

- Coast and countryside
- History and heritage
- City culture

2.12 Undiscovered and dramatic landscapes are one of four unique selling points identified and events and attractions are to be featured in all campaigns.

2.13 There will be six areas of activity, as follows:

- Main UK campaign
- Themed and special interest UK campaigns
- Overseas activity
- Business tourism
- Website and e-marketing
- Groups, travel trade and schools

2.14 Target markets for the main UK campaign are as follows:

- People taking short breaks and longer touring holidays
- Cosmopolitans and discoverers, made up of:
  - ABC1 empty-nesters, aged 45+
  - ABC1 couples with and without children
  - Living in urban areas within 3 hours drive of North East England

2.15 Special interest and themed campaigns identified are as follows:

- Walking
- Cycling
- Gardens
- Gourmet
- Golfing
- Adventure tourism
- Cruise market

Fit with the Regional Marketing Strategy

2.16 There is significant indirect fit. Nature has not yet been identified as a special interest campaign in its own right. However, it is well established that enjoyment of wildlife is a significant aspect of enjoyment noted by walkers, cyclists and gardeners. In fact, 54% of readers of RSPB Birds Magazine walk regularly and 93% own a garden and are active growers of flowers, fruit and/or vegetables. Therefore TVINR is likely to appeal to the regional target markets and to target markets for a number of the special interest/themed campaigns.

The Tees Valley Tourism Strategy - Tourism Futures,

2.17 This strategy was produced for the Tees Valley Partnership in February 2003. While this is the current Tourism Strategy its objectives do not neatly coincide with those of the new North East Tourism Strategy, and the position in relation to product development in Tees Valley has moved on considerably over the past 3 years. A new tourism strategy is to be developed by the Area Tourism Partnership (ATP) by 2007.

Tees Valley Area Tourism Partnership Management Plan

2.18 In the effective absence of a tourism strategy for the sub-region, the Management Plan, which applies from 2005 to 2008 is a key strategic document. It has ten objectives, which align with the Regional Tourism Strategy.

2.19 It also identifies product strengths and the associated target markets as shown in Table 1, below.

Table 1: Tees Valley Main Products and Experiences and Associated Target Markets

Current Main Products & Experiences	Target Markets
The Urban Core Experience (encapsulated mainly by the Stockton and Middlesbrough focus)	Good time singles (B/C1), professional dinks (ABC1), caring parents (B/C1)
The Maritime experience (especially related to the Hartlepool and coastal areas	Caring parents (B/C1), new Empty Nesters (ABC1), SKI Brogues (AB)
Activities and Seaside focus (predominantly in Redcar and Cleveland and incorporating Hartlepool along the Coastal Arc)	Caring parents (B/C1), new empty nesters (ABC1), ski brogues (AB), Busy yuppies (AB)
Service Hub, especially Darlington, providing a service focus for the hinterland and on major transport routes	Good time singles (B/C1), new empty nesters (ABC1), professional dinks (ABC1)
Gateway to the North York Moors (incorporating the market town of Guisborough)	Caring parents (B/C1), professional dinks (ABC1), new empty nester (ABC1)

Source: Tees Valley Area Tourism Partnership Management Plan 2005 - 2008
Notes:
Empty nesters are older couples who's children are no longer dependent on them/no longer living at home
Ski Brogues are better off, older couples who are spending their savings rather than building an inheritance for their children (SKI = spending the kids inheritance)
Yuppies are young people who are building a career (YUP = young upwardly-mobile)
DINKS are young couples who have not yet had children and who both work (DINK = dual income, no kids)

2.20 TVINR is identified in the Plan as a major investment project. It sits well with the strategy with the Tees Estuary being a strong coastal element and linking the two main aspects of the Coastal Arc. It also fits well with the activities focus of Coastal Arc and the Redcar & Cleveland Activity Tourism Initiative, which includes improved facilities for birdwatching, which has been identified as a growing leisure activity.

Stockton Tourism Strategy

2.21 There is no specific tourism strategy for Stockton Borough. Instead, the Borough Council subscribes to the Tees Valley Tourism Strategy and Management Plan

Other Issues

Nature Tourism in the Region

2.22 One North East has undertaken research into the nature tourism product in the North East. The conclusion of this work is that:

- The North East has a rich natural heritage
- With the exception of the Farne Islands and Washington Wildlife and Wetlands Centre there are no large/spectacular nature attractions in the region
- There is a large number of nature watching opportunities, but none have the critical mass or the capacity to attract large numbers of visitors

2.23 However, in addition to specific sites, there are wider opportunities to enjoy nature in the region, including the following:

- Sea birds and shore birds at a number of locations, especially in the Northumberland Coast AONB
- Upland birds, especially in the North Pennines AONB
- Upland flora, especially in the North Pennines AONB, including relic alpine flora at Cow Green which is spectacular in the springtime
- Red Kites in the lower Derwent Valley, Gateshead

2.24 The consultants believe that there is an opportunity to link the TVINR into the existing network of nature attraction in the North East in order to promote nature tourism based on:

Table 2: Nature Tourism Product in the North East

Level	Example
Iconic attractions	TVINR, Farne Islands
Anchor attractions	Cow Green Alpine flora. North Pennines Birds, Gateshead Red Kites, Red Squirrels (various locations), Washington Wildfowl & Wetlands Centre, Coatham Marsh/South Gare, Drurridge Bay, Castle Eden Dene, Lindisfarne National Nature Reserve
Framework attractions	Many smaller sites with various interest at different times of year

2.25 Much of the wildlife interest is in the north and the west of the region and so developing the TVINR will help even the balance and provide an attraction of significant wildlife interest in the south of the region.

2.26 During the course of the study, the consultants have identified interest in the concept of nature tourism amongst a number of the stakeholders working for nature conservation in the region.

3 MARKET DEMAND

3.1 This section describes the market for the TVINR. The various segments are summarised in Table 3 and then explained more fully. .

Table 3: Target Population Summary

Segment	Sub-segment	Description	Population
Day visitors from home	0-2 hour's drive time	People making day trips from home resident within 1 hour's drive	873,962
	1-2 hour's drive time	People making day trips from home resident within 2 hour's drive	4,174,714
	Local residents	People living in communities surrounding the reserve	Counted in above
Tourists	Making special trip	Tourists making a trip for the specific purpose of visiting Saltholme	116,500
	Staying in Tees Valley	Tourists staying in the Tees Valley who make a visit to TVINR during their trip	900,000
	Staying in adjacent sub-regions	Tourists staying in adjacent sub-regions who make a visit to TVINR during their trip	9,700,000
	Transit	Tourists passing through Tees Valley or the North East who might break their journey to visit TVINR	127,440
Education*	School	Pupils in Key-stages 1 & 2 and A level within 1 hour's drive	164,160
Special interest	RSPB members living within 0-2 hours	Members making day or staying visits to TVINR	116,500
	RSPB members living 2-3 hours	Members making day and staying visits to TVINR	176,498
	RSPB members living beyond 3 hours	Members making staying visits to TVINR	755,048
	RSPB groups making visits to TVINR	Group visits	130 groups
	Other birdwatchers	Birders making day or staying visits to TVINR	750,000

*Note: * Strictly speaking it is double counting with the 5.8million 2-hr population to deal with these segments separately; however, they all have distinct characteristics and so they are considered separately*

Day Visitors

3.2 A geo-demographic analysis has been undertaken of the resident population. The findings are summarised here and detailed tables and an explanation of the groups is included in Appendix 2.

3.3 The CAMEO *UK* classification system is based on 10 main marketing groups and these are highlighted below. These 10 groups are further divided into 58 specific classifications, which are fully described in the CAMEO *UK* Classifications at the end of this report.

Table 4: Description of *CAMEO UK* Groups

Group	Description
Group 1	Affluent Singles & Couples In Exclusive Urban Neighbourhoods
Group 2	Wealthy Neighbourhoods Nearing & Enjoying Retirement
Group 3	Affluent Home Owning Couples & Families In Large Houses
Group 4	Suburban Home Owners In Smaller Private Family Homes
Group 5	Comfortable Mixed Tenure Neighbourhoods
Group 6	Less Affluent Family Neighbourhoods
Group 7	Less Affluent Singles & Students In Urban Areas
Group 8	Poorer White & Blue Collar Workers
Group 9	Poorer Family & Single Parent Households
Group 10	Poorer Council Tenants Including Many Single Parents

3.4 This analysis is reported in two ways; a 'count analysis' and a 'penetration analysis'. The count analysis shows the profile of residents, from an 'actual numbers residing' perspective, whereas the penetration analysis shows the segments that have above national average numbers calculated as an index where 100 equals the national average. A summary of this analysis is shown in Figures 1 & 2.

Figure 1: Summary of the 1-hour Drive Time Population

1-hour Drive Time Analysis

Penetration Analysis:

The 1-hour from Saltholme illustrates a higher than average representation of the following demographic groups in the area concerned:

- ***CAMEO UK – 10E, 10F, 5G, 6F, 8F, 7D, 7E, 10G, 6D, 8E***

Count Analysis:

The analysis illustrates an abundance of the following demographic groups:

- ***CAMEO UK – 10E, 10F, 8F, 8E, 3D, 5G, 9B, 3C, 4E, 6D***

Figure 2: Summary of the 2-hour Drive Time Population

2-hour Drive Time Analysis

Penetration Analysis:

The 2-hour analysis from Saltholme illustrates a higher than average representation of the following demographic groups in the area concerned:

- ***CAMEO UK – 10E, 9D, 8F, 10F, 6F, 10C, 8E, 5G, 9B***

Count Analysis:

The analysis illustrates an abundance of the following demographic groups:

- ***CAMEO UK – 10E, 8F, 3D, 8E, 10F, 9B, 3C, 6F, 5G, 4E***

3.5 Overall, this analysis shows that the catchment population around TVINR is less well-off than the UK population in general. Whilst this suggests a lower than average level of attraction visiting, there are high penetration rates in classifications which closely match the profile of the RSPB membership and people interested in nature, as follows:

Table 5: Percentage of Population Falling in Classifications which Match RSPB Membership/Nature Interest

Classification	0-1 hour %	0-2 hour %	National %
3C Well-off older couples and families in large detached and semis	3.7%	3.9%	3.8%
4E Couples and families in modern rural and suburban developments	2.3%	2.3%	2.2%
5G Older couples and singles in suburban family semis	4.9%	4.1%	2.5%
6DCouples ad families with school age & older children in spacious semis	4.0%	3.7%	2.7%
8F Singles and couples in small terraced properties	6.7%	8.4%	3.7%
10EMature households in small terraces and semis	16.9%	10.6%	3.3%
Total	38.5%	33.0%	18.2%

3.6 In addition, the high population of disadvantaged people represents a significant opportunity for the RSPB to develop its social agenda in the sub region. The Charletons Ward in which TVINR lies is currently ranked at 480 in the UK Index of Multiple Deprivation. GDP per capita in the area is 17% below the national average. 12 out of 30 wards in Stockton fall within the UK's 10% most deprived, whilst in Middlesbrough, immediately across the Tees, 50% of wards fall within the UK's 10% most deprived.

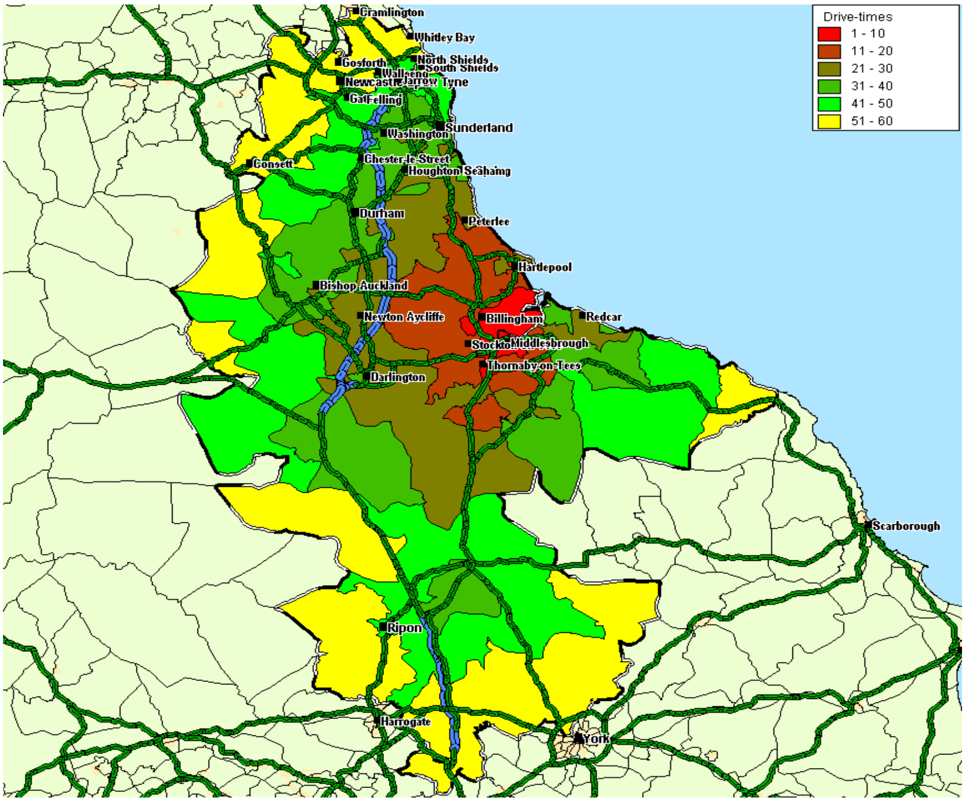
3.7 The RSPB's Lifelong Learning Strategy for TVINR includes the following:

- recruiting project staff locally
- offering recreational, educational and training opportunities to local people, through volunteering
- seeking funding for free transportation to the site for selected schools and community groups

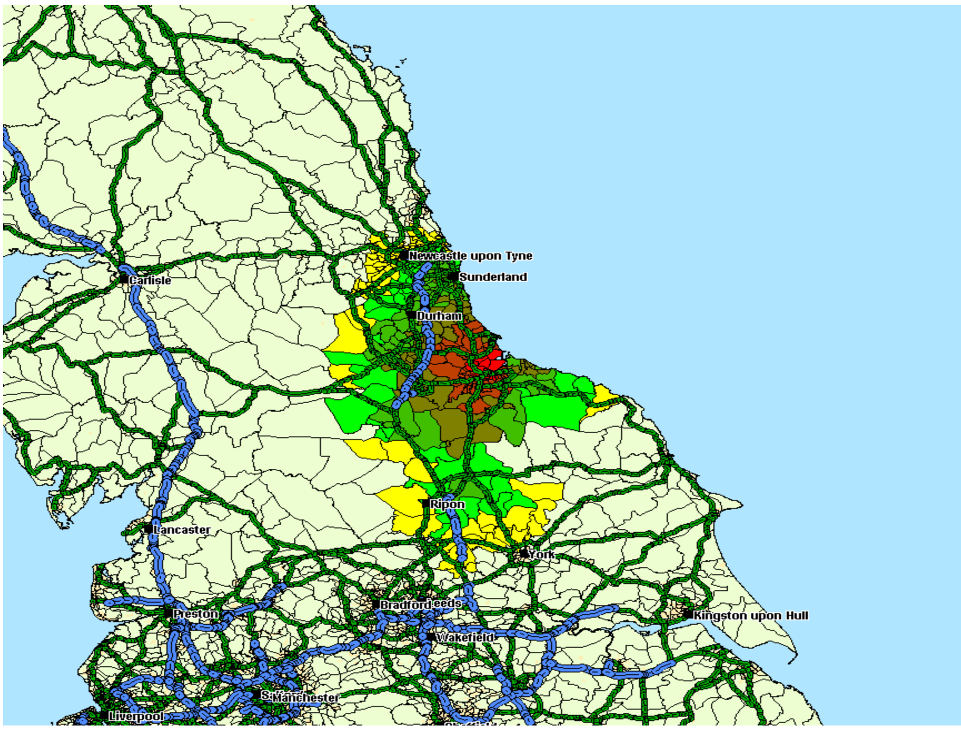
1-hour Drive Time Population

3.8 Maps 1 & 2 below provide a graphical illustration of the areas covered within a 1-hour's drive time of TVINR divided into 10 minute journey bands. Map 1 shows the drive time zone in detail and Map 2 shows a regional perspective.

Map 1: One Hour Drive Time Zone: Detail Perspective



Map 2: One Hour Drive Time Zone: Regional Perspective



1-hour Drive Time – Count

3.9 Table 6 below highlights the top 10 classification groups, based on actual numbers residing, within the 1-hour drive time area from TVINR. Classifications from groups 10 (Poorer Council Tenants Including Many Single Parents) and 8 (Poorer White & Blue Collar Workers) are the most numerous.

Table 6: 1-Hour Drive Population Count: Most Numerous Classifications

Group	Description	Drive Time %
10E	Mature Households In Small Terraces & Semis	16.9
10F	Poorer Singles In Local Authority Family Neighbourhoods	8.4
8F	Singles & Couples In Small Terraced Properties	6.7
8E	Mixed Mortgagees & Council Tenants In Outer Suburbs	5.8
5G	Older Couples & Singles In Suburban Family Semis	4.9
6D	Couples & Families With School Age & Older Children In Spacious Semis	4.0
3C	Well-Off Older Couples & Families In Large Detached & Semis	3.7
9B	Poorer Singles & Families In Mixed Tenure	2.6
4E	Couples & Families In Modern Rural & Suburban Developments	2.3
3D	Wealthy Mixed Households Living In Rural Communities	1.7

Source: CAMEO UK

3.10 As noted in Table 5, classifications 10E, 8F, 5G, 6D, 3c and 4E are core markets for the RSPB. These classifications make up 38.5% of the 0-1 hour resident population, an estimated 336,500 people.

1-hour Drive Time – Penetration

3.11 The table below highlights the top 10 classification groups, based on above national average numbers, within the 1-hour drive time area from TVINR. The penetration analysis is more 'spikey' with classifications from 5 (Comfortable Mixed Tenure Neighbourhoods), 6 (Less Affluent Family Neighbourhoods), 7 (Less Affluent Singles & Students in Urban Areas), 8 (Poorer White & Blue Collar Workers) and 10 (Poorer Council Tenants Including Many Single Parents) all indexed over 150 (50% more common than in the national population).

Table 7: 1-Hour Drive Population Count: Highest Index Classifications

Group	Description	Index
10E	Mature Households In Small Terraces & Semis	508
10F	Poorer Singles In Local Authority Family Neighbourhoods	314
5G	Older Couples & Singles In Suburban Family Semis	198
6F	Less Affluent Couples In Suburban Family Neighbourhoods	193
8F	Singles & Couples In Small Terraced Properties	180
7D	Young Singles, Couples & Students In Urban Areas	163
7E	Young Singles In Privately Rented & Housing Association Properties	153
10G	Single Renters In Mixed Age Hi-Rise Communities	150
6D	Couples & Families With School Age & Older Children In Spacious Semis	147
8E	Mixed Mortgagees & Council Tenants In Outer Suburbs	147

Source: CAMEO UK

1-hour Drive Time – Overall Ranking

3.12 Overall, the highest-ranking CAMEO *UK* group was CAMEO Group 10, which represents Poorer Home Owners, with 26.6% of residents in this drive time area falling into this classification and with an index rating of 231 for the group. In particular this group is represented highest by 10E and 10F classifications with both the highest count and penetration scores of the group (see Appendix 2 for detailed table).

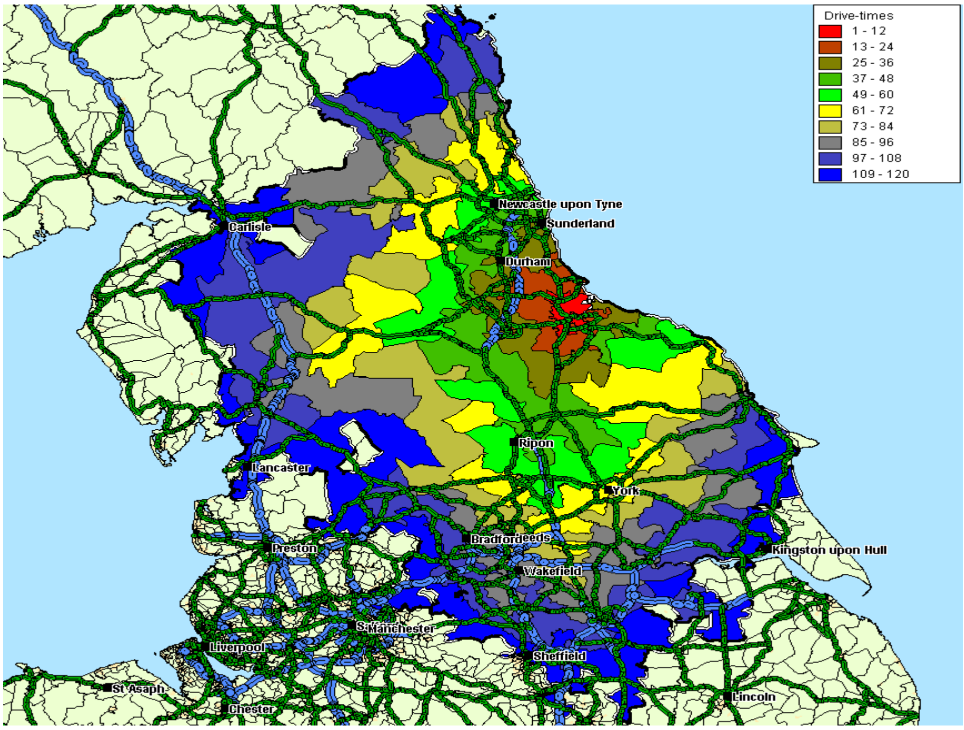
3.13 CAMEO *UK* Group 10, representing 'Poorer Council Tenants Including Many Single Parents', is the highest-ranking index group with an above national average number of residents within this profile. 26.6% of all residents in the area are classified within CAMEO *UK* Group 10.

3.14 The highest-ranking index classification is 10E, representing 'Mature Households in Small Terraces & Semis', and has the highest actual numbers of residents with 16.9%.

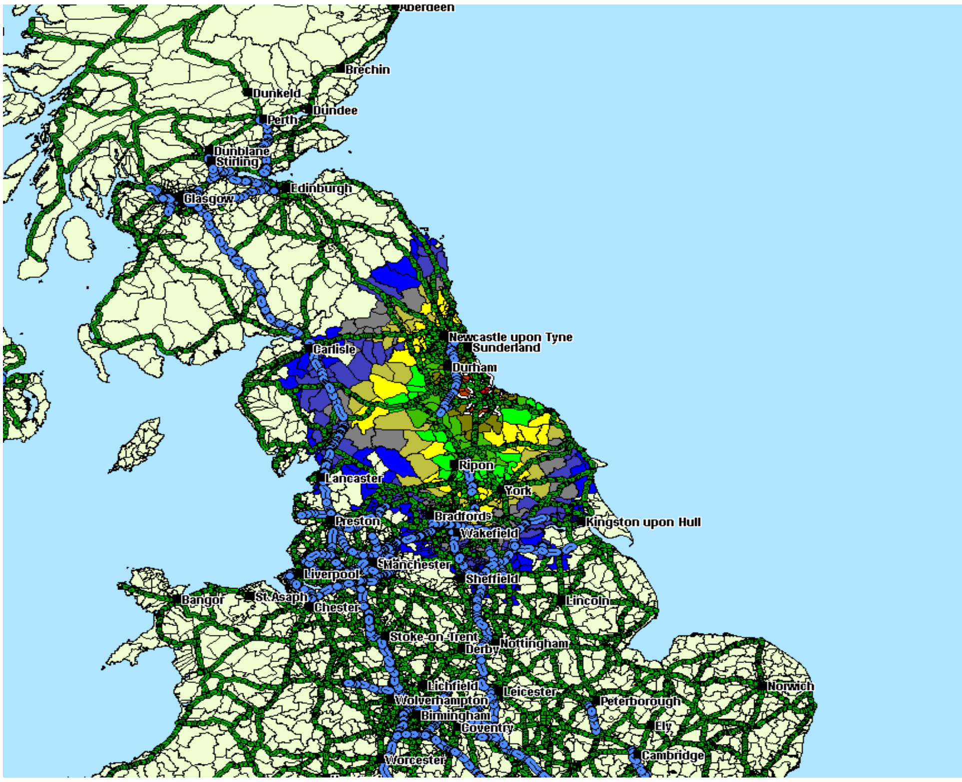
2-hour Drive Time Analysis

3.15 Maps 3 & 4 below provide a graphical illustration of the areas covered within a 2-hour's drive time of TVINR divided into 10 minute journey bands. Map 3 shows the drive time zone in detail and Map 4 shows a regional perspective

Map 3: Two Hour Drive Time Zone: Detail Perspective



Map 4: Two Hour Drive Time Zone: Regional Perspective



2-hour Drive Time – Count

3.16 Table 7 highlights the top 10 classification groups, based on actual numbers residing, within the 2-hour drive time area from Saltholme. As with the 1-hour population, classifications from groups 8 (Poorer White & Blue Collar Workers) and 10 (Poorer Council Tenants Including Many Single Parents) are among the most numerous.

Table 7: 2-Hour Drive Population Count: Highest Index Classifications

Group	Description	Total %
10E	Mature Households In Small Terraces & Semis	10.6
8F	Singles & Couples In Small Terraced Properties	8.4
3D	Wealthy Mixed Households Living In Rural Communities	2.4
8E	Mixed Mortgagees & Council Tenants In Outer Suburbs	6.7
10F	Poorer Singles In Local Authority Family Neighbourhoods	6.0
9B	Poorer Singles & Families In Mixed Tenure	3.4
3C	Well-Off Older Couples & Families In Large Detached & Semis	3.9
6F	Less Affluent Couples In Suburban Family Neighbourhoods	4.7
5G	Older Couples & Singles In Suburban Family Semis	4.1
4E	Couples & Families In Modern Rural & Suburban Developments	2.3

Source: CAMEO UK

3.17 As noted in Table 4, classifications 10E, 8F, 5G, 3C and 4E are core markets for the RSPB. These classifications make up 38.5% of the 0-1 hour resident population, an estimated 336,500 people.

2-hour Drive Time – Penetration

3.18 Table 7 highlights the top 10 classification groups, based on above national average numbers, within the 1-hour drive time area from Saltholme. As with the 1-hour population, the penetration analysis is more spikey than the count analysis, but there are some notable differenced, with classifications from groups 9 (Poorer Family & Single Parent Households) and 6 (Less Affluent Family Neighbourhoods) present.

Table 8: 2-Hour Drive Population Count: Most Numerous Classifications

Group	Description	Index
10E	Mature Households In Small Terraces & Semis	318
9D	Ethnically Mixed Young Families & Singles In Terraced Housing	265
8F	Singles & Couples In Small Terraced Properties	228
10F	Poorer Singles In Local Authority Family Neighbourhoods	223
6F	Less Affluent Couples In Suburban Family Neighbourhoods	214
10C	Poorer Mortgagees & Council Renters In Family Neighbourhoods	171
8E	Mixed Mortgagees & Council Tenants In Outer Suburbs	170
5G	Older Couples & Singles In Suburban Family Semis	164
9B	Poorer Singles & Families In Mixed Tenure	162
7E	Young Singles In Privately Rented & Housing Association Properties	141

Source: CAMEO UK

2-hour Drive Time – Overall Ranking

3.19 Overall, the highest-ranking CAMEO *UK* category was CAMEO Group 10, which represents Poorer Council Tenants Including Many Single Parents with 20.3 % of residents and had an index rating of 177.

3.20 Table 8 reaffirms that CAMEO *UK* Group 10, representing ‘Poorer Council Tenants Including Many Single Parents’, is the highest-ranking index group with an above national average number of residents within this profile. 20.3% of all residents in the area are classified within CAMEO *UK* Group 10.

3.21 The highest-ranking index classification is 10E, representing ‘Mature Households In Small Terraces & Semis’, this is also the highest ranking in terms of actual count with 10.6% of the 2 hour drive time region.

Conclusions

3.22 The demographic profile of the 1 and 2 hour drive time zones for Saltholme are very similar but with a small number of differences.

3.23 Group 10 (Poorer Council Tenants Including Many Single Parents) was the most numerous group in both drive zones. This and the high rankings for Group 9 and 8 classifications show that both zones have relatively low levels of affluence in comparison to the UK average.

3.24 Analysis of the results at category level reveals a difference between the 1 hour and 2 hour results. Within the one hour drive time the highest ranking for both count and penetration is 10E followed by 10F. Although 10E is still top in the 2 hour drive time there are differences in the profile. In particular 8F- Singles and couples in small terraces becomes more significant for the

2 hour drive time, as it second in count with 8.4% of the population for the area. It also has the 3rd highest penetration with an index of 228 over twice the national average.

3.25 The profile of the catchment is characteristic of that for most of Britain's urban areas; it does not appear particularly different from the profile of other urban conurbations in the north of England, including south/west Yorkshire and the North West.

3.26 A third of people living within 2 hours drive of Saltholme (33% - 1,377,655 people) fall within groups which have a similar market profile to RSPB members and people interested in wildlife/nature conservation/birdwatching. Within the 1 hour drive time zone, the proportion is even higher (38.5%, 336,475 people).

3.27 This analysis of the population living within the 1 and 2 hour drive times of Saltholme is consistent with data available from a number of sources and shown on the Tees Valley Joint Strategy Unit Statistics website; these show:

- Relatively high levels of unemployment and worklessness
- Relatively high levels of depravation

3.28 The total population living within the 2 hour drive time of Saltholme is 5 million, made up as follows

Table 9: Population

Drive Zone	Population
0 – 1 hour	873,962
1 – 2 hour	4,174,714
0 – 2 hour	5,048,676

Source: CAMEO UK

3.29 Information on day trips is available from the United Kingdom Leisure Day Visits Survey which was undertaken in 1994, 1998 and 2003. Data is reliable at national and Government Office Region levels, but not below this.

3.30 It shows that the scale of day trip activity is very large. 81% had taken a day trip within the two weeks before interview, 50% to a town or city, 21% to the countryside and 9% to the coast. The volume of day visits increased steadily between 1994 and 1998 but fell back to 1994 levels in 2003.

3.31 Day trip takers are more likely to be from the higher social groups and this is more so for countryside trips, where two thirds are taken from the higher social groups.

Table 10: Day Visits by Social Group

Social Groups	All Trips	Countryside Trips
ABC1	55%	65%
C2DE	44%	34%

3.32 People with children are less likely to take day trips – 33% as opposed to 67% without children. Towns and cities have experienced a growth in visits at the expense of the countryside and the coast/seaside. Spending per trip is also higher for towns and cities than for the other destinations.

3.33 Visits to attractions, places of interest and events were more common amongst day visitors to the countryside than to other destinations (5% of all trips as opposed to 4% on coastal/seaside trips and 3% on trips to towns and cities).

3.34 In 2003, an estimated 277 million day trips were taken, 171 million to towns and cities, 33 million to the countryside and 22 million to the coast/seaside. Average trip duration was 3.1 hours with an average 2.3 hours spent at the destination. Average distance travelled was 11.4 miles and the average spend per trip was £28. Duration, distance and spend per trip are all skewed by trips to towns and cities.

Tourists

3.35 Information on tourism demand is available from One North East's Tourism Team (based on the UKTS and International Passenger Survey (IPS). An estimate of the volume and value of demand for tourism in the Borough is available from STEAM (Scarborough Tourism Economic Assessment Model).

3.36 Overall, the world trend in tourism is upwards, fuelled by continued economic growth in the Far East and Pacific Ring. This is expected to continue for the foreseeable future as China develops to its full capacity. The worldwide growth, however, has not been felt evenly. New destinations and those in the Far East have grown more rapidly with the result that more-established European destinations are losing market share.

3.37 The tourism market is fiercely competitive and it has been affected in recent years by a number of factors, including:

- Greater confidence of tourists seeking more interesting and fulfilling trips
- Emergence of cheap European air travel and strong competition from southern and eastern European cities
- Proliferation of leisure and recreation activities vying for disposable income

3.38 The following drivers are shaping demand for tourism and leisure products and services:

- Disposable income is increasing and will continue to do so people will have more money to spend on leisure
- Discretionary income will increase faster than leisure time so people will become increasingly selective and demanding when deciding how to spend it
- People will be better educated and more experienced travellers. As a result they will want a broader range of high quality experiences – trips and breaks offering a variety of activities will be increasingly in demand
- The ABC1 Socio-economic group will increase and the C2DE group will reduce
- There will be more households without children
- There will be more single person households

- The trend of taking more short breaks will continue and long holidays taken in the UK will continue to decrease
- Day trips will continue to increase
- Demand for self-catering breaks of 3 – 7 nights will increase
- Congestion and the desire to escape it will increase
- The internet will continue to become more important for bookings and other technologies will have an impact on communications
- Demand for the guaranteed quality of branded products will increase, as will demand for high quality independent products. Correspondingly, there will be less tolerance of poor quality

3.39 Health is also an issue, with interest in healthy life-styles and exercise increasing, partly in response to Government policies. Although there has been a steady increase in interest in environmental issues, this has not translated wholesale into the tourism industry. However, it has led to the rise of 'eco-tourism' – trips to enjoy the natural and cultural distinctiveness of a destination.

Transit Tourists

3.40 There is no established methodology for estimating the likely number of transit tourists. However, estimating the possible number of visits from RSPB members is one way of establishing a likely minimum.

3.41 There are 1.05m RSPB members and the majority of these are resident in the south east of England. The UKTS shows that 12% of UK domestic holidays are taken in Scotland and 3% are taken in the North East Region.

3.42 By applying these results to the RSPB membership and assuming that 66% of those travelling to Scotland travel up the west side of the country (M6/A74 – which is motorway all the way to Glasgow - as opposed to A1) and that all of those travelling to the North East are potential transit visitors (because of TVINR's location in the region), the potential minimum transit demand can be estimated as shown in Table 11.

Table 11: Estimate of Transit Tourist Demand

Members & Supporters*	Travelling to Scotland via A1	Travelling to the North East	Total
1,800,000	74,440	54,000	127,440

**Estimate made up of 1,051,000 RSPB members and a further 750,000 non members who read the RSPB's 'Bird's Magazine*

Tourism Trends

3.43 UKTS and IPS sourced data is only available down to a sub-regional level. The tables below show the trends in domestic tourism (visits made by UK residents) and international tourism (visits made by overseas residents).

3.44 Considering the data from 2000 to 2003, which we can assume is reliable, the Tees Valley has experienced a growth in domestic tourism far above the regional and national trend. It is not evident what proportion of this growth has occurred in Stockton Borough, but the whole of the Tees Valley region is within one hour's drive of Saltholme and so can be considered the tourism market.

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3.45 In North Yorkshire (which includes the North York Moors and the Yorkshire Dales, the market appears be continuing to recover after the 15% fall in trips experienced in FMD-affected 2001, whereas the Yorkshire Region appears to have recovered to pre-2001 levels.

Table 12: Domestic Tourism Trips (millions)

	2000	2001	2002	2003	2004
Tees Valley	0.5	0.6	0.8	0.9	0.9*
North East	5.6	4.3	4.8	4.8	4.8*
North Yorkshire	5.7	4.6	5.0	4.9	n/a*
Yorkshire Region	13.1	11.0	12.2	13.1	n/a*
England	140.4	131.9	134.9	121.3	121.3*

Source: One North East & STAR UK, based on UKTS
** NB: A change in sampling methodology means that 2004 data from the UKTS is unreliable*

3.46 Whilst the number of domestic tourism trips to the North East appears to be static, Tees Valley has seen a more erratic pattern of visiting by overseas residents.

Table 13: International Tourism Trips (000's)

	2000	2001	2002	2003	2004
Tees Valley	60	45	50	70	50
North East	440	441	530	510	540
North Yorkshire	430	333	340	350	n/a
Yorkshire Region	920	807	860	920	n/a
England	21,480	19,374	20,540	21,139	23,600

Source: One North East, Yorkshire Tourist Board & STAR UK, based on IPS

3.47 Information on tourism is not available for Stockton. However, STEAM data is available for Hartlepool Borough for 2004 and 2003 as follows. STEAM is dependent on the quality of input data if it is to be reliable. We are not aware of the level of input data quality, but assuming this has been constant, it acts as a useful comparative measure.

3.48 STEAM shows that the number of tourist visits and the number of tourist days in the Borough increased between 2003 and 2004. It also shows that day visitors and visitors who stay with friends and relatives account for the majority of visitors and visitor days. Since these groups spend less than visitors in commercial accommodation, income from tourists is relatively low. Note that STEAM measures impacts of day and staying visitors.

Table 14: Tourist Days in Hartlepool (000s)

Tourist Days (000s)	2003	2004	% Change
Serviced accommodation	91	128	+41%
Non-serviced accommodation	15	12	-20%
SFR	574	699	+23%
Day visitors	283	355	+25%
TOTAL	968	1194	+23%

Source: GTS (UK) Ltd

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Table 15: Tourist Trips in Hartlepool (000s)

Tourist Trips (000s)	2003	2004	% Change
Serviced accommodation	58	7	+33%
Non-serviced accommodation	3	2	-21%
SFR	256	311	+21%
Day visitors	283	355	+25%
TOTAL	600	745	+24%

Source: GTS (UK) Ltd

Table 16: Tourist Spending in Hartlepool

Tourist Spending (£ millions)	2003	2004	% Change
Serviced accommodation	7.81	10.05	+29%
Non-serviced accommodation	0.38	0.41	+ 9%
SFR	15.83	19.20	+21%
Day visitors	6.97	8.86	+27%
TOTAL	30.99	38.53	+24%

Source: GTS (UK) Ltd
Millions, indexed by +1.0263 RPI factor 03/04

3.49 STEAM gives an indication of seasonality and Tables 17 and 18 below show that:

- Overall, tourism in Hartlepool and in Tees Valley is seasonal with more than twice as many trips per month in the summer months
- However, there are differences in the nature of seasonality between different types of visitor, as follows:
    - Staying trips have a higher seasonal peak in the summer months than day visits
    - Visits to friends and relatives broadly follow a less peaked pattern, but there are peaks at Christmas and Easter, which do not show in staying and day visitors
    - Staying visitors using self-catering accommodation have a more peaked profile

3.50 As noted already, there is strong demand from birdwatchers and family groups in the winter and shoulder months and so developing TVINR will help to reduce the seasonality of tourism in the Tees Valley.

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Table 17: Seasonality of Tourist Days in Hartlepool in 2004

Tourist Days (000s)	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Set	Oct	Nov	Dec	Total
Serviced accommodation	3.1	5.1	8.4	10.5	11.4	11.2	15.1	13.5	14.0	12.7	11.5	11.6	**128**
Non-serviced accommodation	0.2	0.2	0.6	1.3	1.6	1.6	2.1	2.3	1.5	0.3	0.1	0.2	**12**
SFR	30.1	18.7	38.1	70.3	63.4	60.8	92.6	72.8	53.3	57.5	42.4	99.1	**699**
Day visitors	14.2	17.4	7.5	13.4	11.4	26.0	143.9	24.4	20.2	26.8	21.8	27.7	**355**
Total Tourist Days	47.7	41.5	54.6	95.4	87.7	99.6	253.7	113.0	89.0	97.3	75.8	138.6	**1,194**

Source: GTS (UK) Ltd for One North East

Table 18: Seasonality of Tourist Days in Tees Valley in 2004

Tourist Days (000s)	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Set	Oct	Nov	Dec	Total
Serviced accommodation	26.4	46.4	75.3	88.8	101.5	91.0	126.2	121.5	124.9	112.4	106.9	116.9	**1,138**
Non-serviced accommodation	15.2	5.5	7.8	21.2	25.3	28.3	45.8	48.9	38.9	25.2	4.2	5.3	**262**
SFR	186.3	102.5	150.0	365.6	283.5	218.8	362.4	360.3	207.7	231.5	178.5	503.8	**3,151**
Day visitors	852.8	917.5	900.8	1,237.8	1,008.9	1,345.8	2,001.1	1,519.3	1,214.9	1,093.8	909.4	713.1	**13,715**
Total Tourist Days	1070.7	1071.6	1,133.8	1,713.4	1,419.3	1,683.9	2,535.5	2,050.2	1,586.3	1,462.8	1,990.0	1,339.0	**18,266**

Source: GTS (UK) Ltd for One North East

Education

3.51 There are in the region of 350,000 school pupils in fulltime education within 2 hours drive of Saltholme, made up as follows:

Table 19: Pupils in Fulltime Education Within 2 hours Drive of Saltholme

	KS1 & 2	KS 3 & 4	KS 5*	Total
0-1 hour drive	43,093	37,988	8,000	89,081
1-2 hour drive	129,372	115,242	23,266	267,808
0 – 2 hour drive	172,465	153,230	31,266	356,961

** Includes estimate of students in FE Colleges*

3.52 Table 20 shows the number of pupils by local education authority. In addition to this, there are several field study and outdoor education centres on the North York Moors and in the North Pennines which cater for school and college visits from within and outside of the region. It has not been possible to quantify the likely demand from these centres.

Table 20: Pupils by Keystage by LEA

LEA	KS1	KS 2	KS 3	KS 4	KS 5
Darlington	1,500*	1,600*	1,000*	1,000*	1,000*
Hartlepool	3,238	4,773	3,798	2,786	1,500*
Middlesbrough	5,000*	5,000*	5,000*	4,000*	2,000*
Redcar & Cleveland	5,000*	5,000*	5,000*	5,000*	2,000*
Stockton	6,154	8,928	7,354	5,050	2,500*
Durham	10,418	22,522	17,239	11,892	4,000*
North Tyneside	4,122	8,960	6,836	4,633	2,500*
Newcastle	5,251	10,914	8,344	5,774	2,379
South Tyneside	4,000*	4,000*	4,000*	3,500*	1,750*
Sunderland	3,065	3,344	3,833	3,734	1,090
Gateshead	3,991	8,785	6,175	4,282	1,547
North Yorks	20,000*	20,000*	20,000*	15,000*	10.000*

**Estimate*

3.53 We estimate that there are in the region of 89,000 pupils in full time education attending schools within one hour's drive of Saltholme and a further 268,000 pupils within 2 hours drive. There are approximately 32,000 in A' level or further education at colleges and the remainder broadly evenly divided between key stages 1&2 and 3&4.

3.54 Recent surveys of the day visit needs of schools (geography and science teachers) by the consultants elsewhere in the UK show the following characteristics.

3.55 A small number of schools see a summer term trip as partly a 'reward' for a year's work and a small number organise 'reward' trips at the end of the summer and autumn terms. Educational visits must have a strong link to the National Curriculum to address parents concerns over validity, and because of increasing needs to deliver a rigid curriculum. This requirement increases with the age of pupils, as curriculum demands and exams put increasing pressure on the school timetable.

3.56 Some schools organise no trips, but Government is producing an Out of Classroom Learning Manifesto to tackle this. Schools that do organise trips typically run between one trip per class per year and one trip per class per term. Most demand for day trips is relatively local to schools as they address the challenges of lack of funds for transport and shortness of the school day – especially for primary school pupils.

Facilities

3.57 The facilities sought most by teachers when organising educational visits are as follows, in priority order:

- Toilets
- Sheltered place to eat packed lunch
- Safe or enclosed play area (for primary schools)

3.58 Some primary schools prefer sites without a shop or café as they discourage young children from taking money on educational trips. Secondary schools have a lower level of needs, needing toilets if they were not provided on the coach and shelter only at exposed sites.

3.59 Health and safety are also important considerations. Teachers demand a thorough risk assessment and are increasingly concerned about safety risks

Resources

3.60 Resources sought most by teachers when organising educational trips are as follows, in priority order:

- An education officer or expert guide
- Interactive activities
- Worksheets and/or fact sheets
- A video/CD/DVD and other materials for pre-visit study
- A free visit for the teacher in advance for planning

3.61 The research suggests that the following are also important in the selection of destinations for educational trips:

- Activities and work closely linked to the National Curriculum
- Pre and post visit materials

3.62 Teachers are seeking to deliver more than one part of the National Curriculum in a single visit. Ideally, therefore, a visit should combine several activities. Many schools, especially secondary, prefer to plan their own materials.

3.63 The RSPB will offer all of these facilities and resources at TVINR and so will be well-placed to provide environmental education and meet a wide range of curriculum requirements.

Constraints

3.64 The cost of transport and admission (or cost of an education visit) are the most common constraints to educational visits, followed by lack of time – both space in the curriculum to fit in a visit and teacher time to plan a visit.

3.65 In secondary schools, the availability of staff to supervise visits and opposition from other teachers, who would lose teaching time on the day of the visit, are also issues.

3.66 More resources and cheaper provision (RSPB subsidises field teaching from core resources and will look for grant-aid to provide free places and travel bursaries to local schools at TVINR) would encourage more visits, though many teachers interviewed said that they did not perceive a need for any more educational visits than they take currently and so penetrating this market will not be easy as there appears to be relatively high loyalty to destinations/attractions already used. However, RSPB already achieves a high penetration of this market, hosting over 50,000 pupil visits per year to its UK reserves. It is also active in the sector in other ways and has co-produced a guide to Out of Classroom Learning.

3.67 In addition to pupils attending schools, the education market for TVINR includes the following segments. Unfortunately, data on the numbers participating is not readily available and so these sub-segments have not been included in the estimates of market size and visitor numbers contained in this report:

- Students in fulltime higher education (especially those on geography, environmental and science courses)
- Adults engaged in further education (night schools, WEA, Open University, etc)
- People engaged in life long learning activities (U3A, clubs and societies, local authority programmes, etc)

Special Interests

3.68 The TVINR is likely to appeal strongly to birdwatchers and this appeal will grow as the habitat develops and more and more breeding and migrant species are attracted. Although only 2-3% of UK holidays have nature study as the main purpose, approximately a fifth involve some kind of participation in nature study. This reflects the general trend that participation in activities/special interests as a main purpose has remained relatively static over the last 15 years, but participation in activities and special interests whilst on a holiday trip has increased by four times in the same period.

Birdwatching and Nature Tourists

3.69 There has been no comprehensive study of demand for natural history tourism in the UK, although the RSPB and other nature conservation organisations estimate that the number of active birdwatchers is in the region of 2 million. This is based on the scale of membership of birdwatching organisations and readership of relevant magazines. The RSPB has analysed aspects of the market (Valuing Norfolk's Coast: The Economic Benefits of Environmental Wildlife Tourist, RSPB, 2000 and RSPB Reserves and Local Economies, RSPB, 2002)

3.70 A number of studies to measure the economic impacts of wildlife resources, or the value of the natural environment have been undertaken and a summary of the significant volumes of spending and employment created by natural environment tourism is shown below.

Table 21: Volume and Value of Natural History Tourism

Destination	Researcher & Date	Aspect Measured	Expenditure Generated	Employment Supported
Valuing Norfolk's Coast	RSPB (2000)	Spending by visitors to nature reserves	£5.3 million in study area	620 jobs supported
South West England	Countryside Commission & RDC (1997)	Tourism spending in the countryside	80% of all tourism spending in the region	-
South West England	National Trust (1999)	Tourism attracted by conserved landscapes	£2,354m annual expenditure by tourists	97,200 jobs (43% of tourist related jobs
RSPB reserves in Britain	RSPB (2001)	Spending by visitors to RSPB reserves	£11.7 million spending as a result of visiting RSPB reserves	1,000 FTEs supported
UK Opsrey tourism	RSPB (2006)	Visitors viewing Ospreys	300,000 visitors spent £3.5 million	
Leighton Moss Reserve	RSPB (1998/99)	Visitors to the reserve	92,531 visitors spent £1.7 million in the local economy	82.5 FTEs

Sources: The Economic Impact of Recreation and Tourism in the English Countryside, RDC, 1997; Valuing our Environment, The National Trust, 1999; Spending by Visitors to RSPB Reserves, RSPB, 2001; Working with Nature in Britain, RSPB, 1994; Leighton Moss Reserve and the local Economy, RSPB, 2000; Valuing Norfolk's Coast, RSPB (2000)

3.71 An unpublished study (The Economic Impact of Recreation and Tourism in the English Countryside, RDC, 1997) estimated the value of wildlife tourism in England and Wales to be between £350 million and £450 million in 1991/92, supporting in the region of 53,000 FTEs (six times the number of jobs in direct conservation).

3.72 Some understanding of the profile of people interested in natural history can be gleaned from the readership profiles of special interest magazines, these are summarised in Table 22. Like all niche activity and special interest markets, the volume of the natural history tourism market increases as the level of expertise in the topic decreases.

3.73 This means that whilst very serious birdwatchers will be attracted to the area, they will tend to look after their own information needs (since they know where to find it) and are unlikely to be influenced by marketing, except where a specialist product is offered – for example a special event where experts are involved, or which give access to places they cannot normally go, or a package guided by a specialist and aimed specifically at this market, or access to particular species, such as the scarce migrant species that are recorded on Teeside more regularly than anywhere else in the North of Britain.

3.74 As Table 22 summarises the readership profiles of three of the most popular, mainstream publications, they tend to be:

- From higher socio-economic groups
- In older age groups
- Interested in gardening and walking
- Regular holiday-takers

Table 22: Readership Profiles of Natural History Magazines

	Natural World	BBC Wildlife	Birds (RSPB)
Readers	196,600	403,000	1,800,000
Reader Type	Members of wildlife trusts	General interest in natural history	RSPB members and other birdwatchers
Sex	54% Male 45% Female	53% Male 47% Female	51% Male 49% Female
Age	Most aged 45 – 75	Average age 51	4% Aged 16-24 7% Aged 25-34 14% Aged 35-44 20% Aged 45-54 22% Aged 55-64 23% Aged 65+over
Household unit	n/a	n/a	20% Single adult 62% 2 Adults 19% Adults & children
Social Grade ABC!	Predominantly ABC1	65% ABC1	66% ABC1
Home-owners	87%	n/a	88%
Other hobbies	74% Gardening 64% Walking 32% Photography	n/a	85% Gardening 53% Walking 33% Photography
Holidays	Average 2/year 45% UK holiday 39% Overseas holiday	More than 2/year High spend on holidays Seek locations off the beaten track	73% Taken holiday in last 12 months 21% Taken 3 holidays in last 12 months 40% Taken last holiday in UK

Source: BBC Wildlife, Natural World and RSPB Birds Magazine Readership Profiles

3.75 In 2002, the Cumbria Tourist Board undertook a marketing campaign called 'Special Selection'. The campaign was researched in order to find out which 'heritage interests' were popular with people interested in visiting Cumbria and to profile market segments with particular interests. Wildlife was ranked the fifth most popular interest. Gardens, which will feature at TVINR, were the third most popular aspect.

Table 23: Interest in Aspects of Heritage Amongst Respondents to the Cumbria Tourist Board 'Special Selection' Campaign, 2002

Theme/Interest	Rank Order
Picturesque villages	1
Food and drink	2
Gardens	3
Boats and lake cruises	4
Wildlife	***5***

Theme/Interest	Rank Order
Historic houses	6
Local crafts	7
Castles	8
Events and festivals	9
Railways	10
Myths and legends	11
Artists and galleries	12
Roman history	13
Museums	14
Poets and writers	15
Religious heritage	16

Source: Cumbria Tourist Board, 2002

3.76 Research by the RSPB in 2000 showed that visitors to nature reserves in North Norfolk spent an average of £14.86 per person per day and an average of £59.53 per person per trip. Day visitors spent on average £6.48 per person per trip and staying visitors spent on average £113.97 per person per trip.

RSPB Members

3.77 RSPB members make up a significant proportion of visitors to many of the organisation's reserves. A member survey conducted in 2005 found that members are prepared to travel some distance to visit reserves – on average 110 minutes on average. There is a smaller, but still significant number of members with a willingness to travel over three hours.

Table 24: Distances RSPB Members Travel to Visit Reserves

Travel Time	% Willing to Travel
Up to 30 minutes	98%
Up to an hour	93%
Up to 2 hours	58%
Up to 3 hours	17%
3 hours or more	9%

Source: RSPB (2005)

3.78 An analysis of the location of RSPB members shows that 116,461 live within two hours drive of Saltholme. Just 23,189 members live in the North East region, with most of the million plus members resident in South East England. A table showing the distribution of members by local authority area and drive time zone is shown in Appendix 3.

Table 25: RSPB Members in Relation to Saltholme

Distance	Number
0-1 hours drive	26,667
1-2 hours drive	89,794
0-2 hours drive	116,461
2-3 hours drive	176,498
0-3 hours drive	292,959
3+ hours drive	755,048
Total members	1,051,000

Source: RSPB (2005)

3.79 Members gain free access/free parking at RSPB reserves. Many visit whilst on holiday or in transit. The strategic location of TVINR, within easy access of the A19 means that it is likely to benefit from such visits (see 3.40 – 3.42 and Table 11, above)

3.80 There are 130 active RSPB groups in the UK and all of these organise a programme of visits to reserves. As the habitats at Saltholme develop, it is likely that TVINR will become a regular on the group visits programme of RSPB groups – certainly those located within 2 hours drive and from further a field, generating some staying trips. Evidence from other reserves shows that the level of visiting by RSPB groups is similar to that by individual members.

3.81 In addition to the 1,051,000 RSPB members, it is estimated that there are in the region of a further 949,000 birdwatchers in the UK, making a total of 2 million (see 3.69). It is possible that birdwatchers in general have a spatial distribution which is less skewed towards the south east of England than RSPB members. However, applying the same distribution as RSPB members would suggest the following distribution of birdwatchers who are not RSPB members in relation to TVINR.

Table 26: Birdwatchers (non-RSPB Members) in Relation to Saltholme

Distance	Number
0-2 hours drive	104,390
2-3 hours drive	161,330
3+ hours drive	683,280
Total members	949,000

Attraction Visiting

3.82 The England Visitor Attractions Survey (2004) provides a useful overview of attraction visit trends as follows:

- Visits to wildlife attractions increased by 1% between 2003 and 2004, in line with visits to all attractions
- Visits to free attractions rose by 3% (1% in the North East) whilst visits to ‘paid for’ attractions were static
- Visits to free wildlife attractions fell by 2% whilst visits to ‘paid for’ wildlife attractions were static
- The weather was the second most significant positive factor and the most significant negative factor affecting visits

3.83 Though weather can be a significant factor which creates sometimes significant fluctuation at both indoor and outdoor attractions, the long term trend in attraction visits in the North East is one of steady growth, especially to the larger attractions.

Visits to Attractions in the Tees Valley

3.84 Data on attraction visits back to 1989 is available from One North East. However, many ‘missing’ returns from attractions mean it is difficult to draw concrete conclusions. Many of the Tees Valley attractions are relatively small scale. Visits to attractions in the Tees Valley show that:

- For attractions with complete data, four have an increasing trend in visitor numbers and three have a decreasing trend

- For attractions with incomplete data two have an upward trend and two have a downward trend

Table 27: Visits to Large Attractions in Tees Valley

Attraction Name	2000	2001	2002	2003	2004	Trend 2000/04
Captain Cook Birthplace Museum, Marton	118,000	60,000	n/a	65,186	56,565	-52%
Darlington Railway Centre and Museum	n/a	22,463	n/a	32,266	28,337	Upwards
Dorman Museum, Middlesbrough	n/a	n/a	n/a	160,617	91,000	Downwards
Hardwick Hall Country Park, Sedgefield	n/a	n/a	235,926	n/a	286,728	Upwards
Hartlepool Historic Quay	74,287	72,804	73,408	57,530	72,892*	+2%
Hartlepool Art Gallery	56,901	52,355	59,942	48,565	60,916	+7%
Kirkleatham Old Hall Museum, Redcar	n/a	n/a	n/a	43,752	n/a	-
Museum of Hartlepool	90,261	105,498	105,218	83,003	98,794	+9%
Ormesby Hall, Ormesby, Middlesbrough	23,050	17,908	20,798	n/a	19,798	-14%
Preston Hall Museum, Stockton	76,366	78,160	66,262	71,528	67,052	-12%
Saltburn Cliff Tramway	73,194	109,373	101,720	n/a	71,052	Downwards
Stewart Park, Marton, Middlesbrough	250,000	150,000	n/a	n/a	440,698	+76%
Transporter Bridge, Middlesbrough	n/a	n/a	n/a	n/a	84,278	-

Source: One North East Tourism Team
** Includes approximately 25,000 free visits*

Visits to Wildlife Attractions in the North East

3.85 Visits to wildlife attractions in the North East are summarised in Table 25. This shows that:

- For those with complete data, two have an upward trend and one has a downward trend
- For those with incomplete data, two have an upward trend and one is level

Table 28: Visits to Wildlife Attractions in the North East

Attraction Name	2000	2001	2002	2003	2004	Trend 200/04
Billy Shiels Farne Island Boat Trips	n/a	n/a	n/a	n/a	35,000	-
Bowlees Visitor Centre, Middleton in Teesdale	n/a	n/a	n/a	n/a	20,103	-
Castle Eden Dene Nature Reserve, Peterlee	75,000	75,000	n/a	150,000	158,447	+111%
Farne Islands	31,006	33,522	33,159	34,168	32,053	+3%
High Force Waterfall Walk, Forest in Teesdale	n/a	41,630	65,995	142,952	n/a	Upwards
Ingram National Park Centre, Powburn, Alnwick	n/a	n/a	n/a	n/a	21,326	-
National Park Centre Ingram, Powburn	n/a	14,678	27,378	33,335	24,520	Upwards

Once Brewed National Park Centre, Bardon Mill,	65,348	46,793	61,666	78,892	58,559	-10%
Rising Sun Countryside Centre, Benton	n/a	n/a	n/a	n/a	96,611	-
University of Durham Botanic Garden	n/a	n/a	80,000	n/a	n/a	-
Wildfowl and Wetlands Trust, Washington	72,560	71,012	72,182	76,265	72,348	Level

Source: One North East Tourism Team

Visits to Other RSPB Reserves

3.86 Comparison to other RSPB reserves is interesting, but needs careful interpretation when trying to assess the number of visitors to TVINR. Most of the RSPB's reserves are in relatively remote locations. However, Leighton Moss, near Morecambe and Old Moor, in South Yorkshire, are both within reach of large urban populations.

Table 29: Visits to the Most Visited RSPB Reserves

Reserve	Annual Visits
Titchwell Marsh	130,000
Minsmere	91,944
Leighton Moss	78,500
Pulborough Brooks	75,000
Old Moor Dearne Valley	67,000
Arne	64,755
Vane Farm	60,189
Freiston	57,613
Conwy	56,997
Bempton Cliffs	56,588
The Lodge	51,461
Dungeness	41,000
Lochwinnoch	40,336
Abernethy ospreys	35,068
Blacktoft Sands	35,000
Sandwell Valley	33,551

Source RSPB (2005)

3.87 The top RSPB site is Titchwell, with 130,000 annual visits. Titchwell, located in north Norfolk, has a similar offer to TVINR in terms of bird interest but significantly less visitor facilities, a less proximate resident population, but high tourism numbers.

3.88 The importance of visitor facilities is demonstrated by the difference between Titchwell and Snettisham. Snettisham, which is located 10 miles south west of Titchwel, has similar habitats and species to Titchwell, but no visitor centre and attracts just 19,000 visits.

3.89 A number of sites with more limited offer than TVINR support 40-90,000 visitors per year. Therefore it is realistic to expect TVINR to attract visitor numbers at the higher end of this range or above it.

3.90 Table 30 shows a comparison between TVINR and some similar RSPB reserves.

Table: 30: Comparison to Other RSPB Reserves

Location	Description		Estimated Visitor Numbers	Estimated Local Visitor Spending	Estimated Length of Stay
TVINR	Year-round bird interest, including waders; wintering waterbirds; farmland birds; and reedbed species. Significant visitor facilities.				-
	Comparison to Planned TVINR		**Estimated Visitor Numbers, 2003/04**	**Additional Local Visitor Spending (year 2000)**	**Length of Average Visit (hrs)**
	Similarity	**Difference**			
Titchwell	Year-round wildlife interest, large visitor facility but significantly less than TVINR	Area of Outstanding Natural Beauty Smaller resident market, larger tourism market. More modest visitor facilities	130,000	£ 1,731,000	2.8
Pulborough Brooks	Breeding waders and farmland	No reedbed or coastal species Modest visitor facilities	75,000	£ 103,000	2.0
Dungeness	Year-round waders and coastal species	Less reedbed and farmland interest. Isolated from population centres. Modest visitor facility	41,000	£ 209,000	2.6
Vane Farm	Breeding waders and wintering waterfowl	Fewer migrant and wintering waders, no reedbed species. Isolated from population centres. Limited visitor facilities	60,000	£ 242,000	2.5
Old Moor	Year-round interest	More modest visitor facilities	67,000	-	-
Leighton Moss	Wader and reedbed species	More distant from urban population. Lower key visitor facilities. .	78,500	£ 839,000	-

Source: RSPB

Other Wildlife Attractions

3.91 Wildfowl and Wetlands Centres at Barn Elms in London (the London Wetland Centre) and at Martin Mere in east Lancashire, and the Scottish Seabird Centre at North Berwick are three comparable attractions which are located close to urban catchments. They demonstrate that wildlife attractions close to urban populations, delivering good interpretation and the opportunity to get close to nature can attract significant numbers of visitors.

Table 31: Comparable Attractions Elsewhere

Attraction	Annual Visits
Slimbridge Wetland Centre	170,000-180,000
London Wetland Centre	140,000-150,000
Martin Mere	130,000-140,000
Scottish Seabird Centre	200,000 to the site 60,000 to the visitor centre

Sources: Wildfowl & Wetlands Trust Annual Reports

3.92 Based on the above figures, the RSPB is confident that TVINR will establish itself as one of its top 5 visited reserves based on its high quality year round bird spectacle and its significantly higher quality visitor facilities. This would attract visitor numbers comparable with the best wildlife attractions in the country.

4 ECONOMIC IMPACTS

4.1 Estimating the number of visitors to a new attraction is far from a precise science. There is no reliable methodology for this activity. There are three methods and this report considers them all, as follows:

- Considering visitor numbers at other visitor attractions which draw from the same catchment
- Considering visitor numbers at similar visitor attractions elsewhere
- Estimating market penetration rates for the target market segments

Other Attractions in the Catchment

4.2 There are no visitor figures for directly comparable attractions in the sub-region or the region. Washington Wildfowl & Wetlands Centre, with 72,000 visits per year is the closest, however, with its extent and variety of habitats and the variety and sophistication of wildlife watching opportunities, TVINR will be a unique attraction in the North East. It is also worth noting that membership of the Wildfowl and Wetlands Trust, which owns and operates Washington is just 139,000 compared to the 1,051,000 RSPB membership..

4.3 TVINR will charge for car parking only and this will be free for RSPB members and so it would be reasonable to assume that TVINR could achieve a penetration rate somewhere between the admission-charging and free attractions. However, as previously noted, there is no comparable attraction in the sub-region and so it is not possible to make a direct comparison.

4.4 Comparison with nature attractions in the region is similarly problematic as there is no like attraction. The Wildfowl and Wetlands Centre at Washington is the most comparable, but offering a much poorer bird spectacle and lower-key facilities and it has achieved consistent visitor numbers in the region of 70,000 for some years.

4.5 Despite some significant differences, there are many similarities and the (non-special interest) market will perceive TVINR and Washington to be similar. Though the facilities at TVINR will be superior to those at Washington; it will also have substantially more habitat and birdwatching opportunities and as a result it will have considerably greater appeal to the birdwatching market. Washington, then could be considered as a useful benchmark at or beyond the lower end of likely visitor numbers to TVINR.

Table 32: Washington Wildfowl & Wetlands Centre - Comparison

Similarities	Differences
Visitor centre Hides and other watching opportunities(though very limited at Washington) Education programme Events programme	Admission charge ‘Bird zoo’ element WWT has considerably fewer members than RSPB TVINR will be established as one of the best bird watching sites in the UK.

Similar Attractions Elsewhere

4.6 As previously stated, most of the RSPB's reserves are located in relatively rural places and therefore comparison with TVINR is not especially helpful. However, some useful parallels can be drawn, as follows:

- Old Moor (67,000 visitors) is located in South Yorkshire, close to a large urban population
- Leighton Moss (78,500 visitors) is close to Lancaster/Morecambe and within an hour's drive of Preston and urban east Lancashire; it is also close to the M6 and benefits from transit traffic to the Lake District and Scotland
- Vane Farm (60,000 visitors) is within an hour's drive of Edinburgh and the central Scotland

4.7 The scale of facilities at TVINR will be significantly greater than these three attractions; indeed it will have the greatest level of investment in visitor facilities of any RSPB reserve to date.

4.8 The catchment population of TVINR is greater than that for Leighton Moss and Vane Farm. It is most similar to Old Moor, which is the most recently-opened of the three above comparator reserves and where visitor numbers are still increasing towards its 'plateau level'. Comparisons are difficult but consideration of the visitor numbers in relation to scale of facilities suggest higher visitor numbers at TVINR than at most other RSPB reserves.

4.9 The experience of other birdwatching attractions located close to urban populations and providing sophisticated interpretation and visitor facilities shows that it is possible to attract high numbers of visitors (up to 180,000).

Penetration Estimate

4.10 Recent research by Heritage Projects shows that visitor attractions tend to achieve between:

- 1% - 6% of the 0-1 hour drive day trip market
- 1% - 3% of the 1-2 hour drive day trip market
- 1% - 6% of the tourist market

4.11 Table 33 shows a market penetration estimates which have been used to estimate the likely number of visitors by this method for TVINR. The penetration percentages are modest in comparison to market penetration estimates quoted above, to take account of the relatively low level of attraction visiting in the Tees Valley sub-region. Sensitivity testing (see below) shows the impacts which would be achieved if TVINR achieves higher market penetration rates.

Table 33: Penetration Rate Assumptions

Market Segment	Assumptions	Estimated Penetration Rates
Day visits 0-1 hours drive	▪ Penetration rate slightly below average for visitor attractions	3%
Day visits 1-2 hours drive	▪ Penetration rate at bottom of range reflecting low awareness of Tees Valley as a visitor destination	0.5%
Tourists staying in Tees Valley	▪ Low penetration rate reflecting high proportion of business tourism	0.5%
Tourists staying in adjacent sub-regions	▪ Low penetration rate reflecting low awareness of Tees Valley as a visitor destination	0.25%
Transit tourists	▪ 12% of RSPB members take a holiday in Scotland (reflecting average for England) ▪ 34% travel via the M1/A1/A19 ▪ 3% of RSPB members take a holiday in the North East (reflecting the average for England)	5% (of a limited population)
School pupils 0-1 hours drive	▪ Education service meets the needs of schools ▪ Education service surpasses competitor sites ▪ Delivery of TVINR Life-long Learning Strategy	5%
School pupils 1-2 hours drive		2%
RSPB members 0-2 hours drive	▪ 98% willing to travel 1 hour to visit a reserve ▪ 58% willing to travel 2 hours to visit a reserve ▪ 90% of member visits are to the 'top reserves' ▪ TVINR will have a high profile amongst members through 'Birds' magazine and other communication methods ▪ Assume 10% of those living within 2 hours will make a visit in a year	10%
RSPB members 2-3 hours drive	▪ 17% willing to travel 3 hours to visit a reserve ▪ Of these 10% make a visit in a year	1.5%
RSPB members 3+ hours drive	▪ 9% willing to travel more than 3 hours to visit a reserve ▪ 90% of visits to RSPB reserves are to the top (16) reserves ▪ Assume TVINR will penetrate one 16th of this market	0.4%
RSPB groups	▪ A third of RSPB groups will make an annual visit to TVINR ▪ 50 people (i.e. a coach load) per visit	-
Other birdwatchers 0-2 hours drive	▪ Same percentage distribution in drive time zone as RSPB members ▪ Half the penetration rate of RSPB members	5%
Other birdwatchers 2-3 hours drive		0.75%
Other birdwatchers 3+ hours drive		0.2%

4.12 Table 34 shows the estimated number of visitors to TVINR using the market penetration method, applying the penetration rates explained above to the catchment as described in Section 3, above.

Table 34: TVINR Penetration Estimate

Segment	Sub-segment	Population	Population excl. Special Interests*(1)	Penetration*(2)	Number	% of Total*(2)
Day visitors from home	0-1 hour's drive time	874,000	742,943	3.5%	26,003	22%
	1-2 hour's drive time	4,174,714	3,921,719	0.5%	19,608	16.8%
Tourists	Staying in Tees Valley	900,000	-	0.5%	4,500	3.8%
	Staying in adjacent sub-regions	9,700,000	-	0.25%	24,250	20.8%
	Transit	162,000	-	5%	6,372	5.4%
Education	School 0-1 hours drive	89,000	-	5%	4,450	3.8%
	School 1-2 hours drive	164,000	-	2%	3,280	2.8%
Special interest	RSPB members 0-2 hours	116,000	-	10%	11,600	9.9%
	RSPB members 2-3 hours	176,498	-	1.7%	3,000	2.5%
	RSPB members 3 hours +	755,048	-	0.4%	3,400	2.9%
	RSPB Groups	130 groups	-	-	2,150	1.8%
	Other birdwatchers 0-2 hours	104,390	-	5%	5,220	4.4%
	Other birdwatchers 2-3 hours	161,330	-	0.75%	1,210	1%
	Other birdwatchers 3 hours +	683,280	-	0.2%	1,366	1.1%
TOTAL					116,407	

Notes
1: In order to avoid double counting, RSPB members and other birdwatchers have been removed from the resident population. It has not been possible to remove these figures from the other segments as the proportion of members within the populations is not known
2: Percentages are rounded

4.13 Note that the population of birdwatchers living within 0-1 and 1-2 hours of TVINR has been deducted from the corresponding resident figures as they are already included in these.

Conclusions

4.14 Table 35 summarises the estimates of visitor numbers to TVINR using the three methods outlined above. It can be assumed with some confidence that the actual number of visitors will fall within this range.

Table 35: Summary of Estimates

Method	Estimate of Visitor Numbers
Attraction numbers in the area	Over 70,000
Similar attractions elsewhere	Over 58,000 – 180,000
Penetration analysis	116,407

4.15 For the purposes of estimating the economic impacts and for business planning, three scenarios are considered, representing the lower, medium and higher ranges of likely visitor numbers, as follows:

- Low estimate - 80,000 visitors per year
- Medium estimate - 95,000 visitors per year
- High estimate - 110,000 visitors per year

Profile of Visitors

4.16 It is important to understand the profile of visitors in order to gain an understanding of the economic impacts. Table 30 shows an estimate of the proportion of visitors from out of the region

Table 36: Profile – Visitor Numbers

Market Segment	Low Estimate	Medium Estimate	High Estimate
Residents 0-1 hour (22%)	17,600	20,900	24,200
Residents 1-2 hours (16%)	12,800	15,200	17,600
Tourists in Tees Valley (4%)	3,200	3,800	4,400
Tourists in adjacent sub-regions (21%)	16,800	19,950	23,100
Transit tourists (6%)	4,800	5,700	6,600
Education 0-1 hours (4%)	3,200	3,800	4,400
Education 1-2 hours (3%)	2,400	2,850	3,300
RSPB members 0-2 hours (10%)	8,000	9,500	11,000
RSPB members 2-3 hours (3%)	2,400	2,850	3,300
RSPB members 3+ hours (3%)	2,400	2,850	3,300
RSPB groups (2%)	1,600	1,900	2,200
Other birdwatchers 0-2 hours (4%)	3,200	3,800	4,400
Other birdwatchers 2-3 hours (1%)	800	950	1,100
Other birdwatchers 3+ hours (1%)	800	950	1,100
Total (100%)	80,000	95,000	110,000

4.17 Table 37 shows the assumptions which have been made for the proportion of visitors to TVINR who will make day visits and staying visits. These estimates have been made by the consultants based on their understanding of recreation and tourism in Tees Valley and in the North East and Yorkshire regions. They are believed to be realistic. Indeed some segments have very conservative estimates – for example birdwatchers who are not members of the RSPB.

Table 37: Profile – Day and Staying Visitors

Market Segment	Description	Day Visitors	Staying Visitors
Residents 0-1 hour	Residents making day visits to TVINR from home	100%	0%
Residents 1-2 hours		100%	0%
Tourists in Tees Valley	Tourists already staying in Tees Valley making a day visit to TVINR from their accommodation. A small proportion will extend their stay as a result of the visit	95%	5%
Tourists in adjacent sub-regions	Tourists already staying in adjacent sub regions making day visits to TVINR from their holiday destination. A small proportion will extend their stay as a result of the visit	95%	5%
Transit tourists	Tourists passing between further south in England and their holiday destination in the North East of Scotland. A small proportion will make a break in their journey staying a night in the area	80%	20%
Education 0-1 hours	School pupils making a day visit from school	100%	0%
Education 1-2 hours		100%	0%
RSPB members 0-2 hours	Members making day visits to TVINR from home	100%	0%
RSPB members 2-3 hours	Members making longer trips, a proportion will choose to stay overnight	80%	20%
RSPB members 3+ hours	Members making trips to TVINR and staying overnight in the area	20%	80%
RSPB groups	Groups making visits to TVINR. A small proportion, travelling longer distances will choose to stay overnight in the area	80%	20%
Other birdwatchers 0-2 hours	Birdwatchers making day trips from home	100%	0%
Other birdwatchers 2-3 hours	Birdwatchers making longer trips, a proportion will choose to stay overnight	80%	20%
Other birdwatchers 3+ hours	Birdwatchers making trips to TVINR and staying overnight in the area	20%	80%

4.18 Table 38 shows an estimate of the number of visitors attracted to the region to visit TVINR in order to inform an estimate of the economic benefit of TVINR to the North East Region. Again these estimates are based on the consultants' knowledge of tourism in the North East and in Yorkshire and are believed to be very realistic.

Table 38: Profile – In and Out of Region Visits

Market Segment	Day From Within Region	Day From Out of Region	Staying From Within Region	Staying From Out of Region
Residents 0-1 hour	95%	5%	None	None
Residents 1-2 hours	50%	50%	None	None
Tourists in Tees Valley	95% *(1)	5% *(1)	None	5%
Tourists in adjacent sub-regions	10% *(2)	90% *(2)	0%	100%
Transit tourists	0%	100%	0%	100%
Education 0-1 hours	80%	20%	None	None
Education 1-2 hours	55%	45%	None	None
RSPB members 0-2 hours	20%	80%	None	None
RSPB members 2-3 hours	10%	90%	0%	100%
RSPB members 3+ hours	None	None	0%	100%
RSPB groups	20%	80%	0%	100%
Other birdwatchers 0-2 hours	20%	80%	None	None
Other birdwatchers 2-3 hours	0%	100%	0%	100%
Other birdwatchers 3+ hours	None	None	0%	100%

Notes:
1. Assumes 95% of visitors, already staying in Tees Valley, would have spent their money in the sub-region regardless of TVINR (and so this has not been counted), but that 5% are encouraged to stay an extra night because of a visit to TVINR (and so the latter has been included)
2. Assumes 10% of visitors attracted from adjacent sub-regions are staying in the North East and 90% are staying in Yorkshire

4.19 The estimated length of stay for different sub-segments of specialist visitors who will make staying visits is shown in Table 39. It is assumed that TVINR will not be the sole reason for making a trip since people will take the opportunity to do other thinks, both within and outside of the North East Region. For example some will take the opportunity to travel further into the region to visit the Farne Islands or the North Pennines, whilst others will might stay in North Yorkshire for part of their trip. To take account of this factor, the number of days stay used in the spending estimate has been reduced to that shown in the last column of table 39.

Table 39: Length of Stay Estimates and Nights Spent in the North East

Sub Segtment	No. Nights on Trip	No. Nights in North East
RSPB members 2-3 hours	2	1
RSPB members 3+ hours	3	2
RSPB Groups	2	1
Other birdwatchers 2-3 hours	2	1
Other birdwatchers 3+ hours	3	2

4.20 An estimate of spending per day can be made based on the STEAM data collected for Hartlepool, as follows:

- Day visitors - £19
- Tourists staying in serviced accommodation - £85
- Tourists staying in non-serviced accommodation - £25
- Tourists staying with friends and relatives - £22

4.21 It is assumed that 80% of visitors will stay in serviced accommodation and that 20% will stay with friends or relatives. An average spend per night has been calculated using STEAM data as £72.40. STEAM also estimates an average daily spend per head for day visitors as £19. A spend per head of £5 has been assumed for education day visits.

4.22 The estimates for the proportion of day and staying visitors by market segment have been applied to these spending estimates to make an estimate of the total direct spending in the North East Region by visitors attracted to TVINR from outside of the region. This is summarised in Table 40 and the calculations are shown in detail in Appendix 4.

Table40: Spending by Out of Region Visitors

Market Segment	Spending by Day Visitors	Spending by Staying Visitors	Total Spending
Low estimate	£771,564	£616,848	£1,388,412
Medium estimate	£916,232	£732,507	£1,648,739
High Estimate	£1,060,901	£848,166	£1,909,067

4.23 A calculation has been made for the number of jobs created by TVINR considering:

- Direct jobs created by employment at TVINR
- Jobs created by direct spending by visitors from outside of the region
- Jobs supported by spending (excluding salaries) on reserve management

Direct Jobs

4.24 Twenty Three jobs will be created at TVINR to manage the reserve and visitors. This equates to 19 full time job equivalents (FTEs)

Spending by Visitors

4.25 Assuming a figure of £40,000 of spending by visitors to the region to support one FTE, then TVINR will support between 27 and 59 FTEs in the North East region.

Table 41: FTEs Supported by Direct Visitor Spending

Number of Visitors	FTEs
80,000	34.7
95,000	41.2
110,000	47.7

Spending by TVINR

4.26 RSPB has a policy of buying goods and services from local suppliers and this will apply at TVINR. Employment supported by such spending at Leighton Moss was estimated at 2.5 FTEs in an RSPB study in 2000.

4.27 Given the likely scale of TVINR in relation to Leighton Moss, a conservative estimate of 3 FTEs has been made for employment supported through direct spending by the reserve,

Employment

4.28 Table 41 shows that between 49 and 81 jobs will be created/supported by the operation of TIVNR, assuming £40,000 of tourism spending supports one FTE. This does not include secondary spending generated by payment of wages or through the tourism multiplier as applied to out of region visitor spending. Neither does it include any spending by visitors resident in the region, or who would have spent their money in the region anyway.

Table 41: FTEs Created/Supported by TVINR

Number of Visitors	FTEs
Direct employment	19
Direct spending by visitors from outside of the region	34 – 47
Direct spending locally by the reserve	3
Total	56 - 69

5 OTHER IMPACTS

5.1 The TVINR will deliver a wide range of benefits which will support the economic, social and environmental agendas of the North East region and the Tees Valley; these include:

- 9,900 learning opportunities per year
- 63 training opportunities per year for 40 volunteers and 23 staff
- 850m^2 of floor space for community activities
- 5.5 kilometres of new walking routes
- 1.7 kilometres of new traffic fee cycle routes within the reserve
- 4.7 kilometres of new traffic free cycle routes linking the reserve into the cycle network (1.4 kms in year 1; 3.3 kms in year 2)
- 55 hectares of brownfield land restored
- A positive image for the Tees Valley and the region

5.2 In addition, TVINR provides an excellent platform for the development of nature tourism in the region. It will have an international reputation and it occupies a strategic location at the ‘entrance’ to the region from the south – ideally placed to act as a gateway for arriving nature tourists.

5.3 Developing and promoting a wider nature tourism product in parallel with TVINR will significantly increase the economic impact of TVINR by attracting a larger number of staying visitors and increasing length of stay and therefore spending in the region.

APPENDIX

1. **The Brief**
2. ***CAMEO UK* Tables and Groups Described [Remove the current cameo group profiles and leave, or replace with the top profiles that fit RSPB audience]**
3. **RSPB Members by Drive Time**
4. **Spending Estimate - Detail**

APPENDIX 1: THE BRIEF

Economic Impact Assessment for RSPB Saltholme Reserve

Objective

To produce a robust and transparent estimate of the likely economic impacts of the project that can be widely understood and accepted by local and regional government, and potential funders at all levels.

Work Specification

Analysis will require a thorough visitor model for the site, using scenarios based on the RSPB's management plans. It would also involve:

- Analysis of drive and travel times and catchment populations,
- Assessment of the profile of predicted visitors against the objectives in the North East Tourism Strategy (e.g. visitors with higher spend and out of season appeal).
- Spending patterns of different visitor types (e.g. family/individual, overnight staying/day visitors), motivations and origins (local, intra and inter-regional) of visitors, and
- Appropriate economic impact calculations (e.g. using multipliers, adjustments for additionality and displacement).

The visitor profiling and results should identify how many predicted visitors will be additional and from outside of the region. To support some of the predicted estimates and economic impacts, analysis should include comparison to another attraction that is similar in terms of location, demographics, etc., and benchmarking with other developments of similar profile.

Other economic impacts from the development and ongoing management of the site (e.g. habitat creation, work by contractors) will also be quantified. These have been previously analysed across RSPB's network of UK nature reserves. For example, see: "RSPB Reserves and Local Economies" at http://www.rspb.org.uk/policy/Economicdevelopment/economics/local_economies/index.asp .

Predicted project impacts will be measured in line with the Tees Valley Partnership's guidance in its Outline Project Proposal annexes on output measurement, particularly the job creation (1) and businesses support (4) elements.

APPENDIX 2: *CAMEO UK* TABLES AND GROUP DESCRIPTIONS

1-Hour Drive Time Zone *CAMEO UK* Summary Report

Code	CAMEO Description	Post Codes	House Holds	Total %	Nat Total %	Index
1	**Affluent Singles & Couples In Exclusive Urban Neighbourhoods**					
1A	Opulent Couples & Singles In Executive City & Suburban Areas	95	379	0.0	0.3	**10**
1B	Wealthy Singles In Small City Flats & Suburban Terraces	41	181	0.0	1.7	**1**
1C	Urban Living Professional Singles & Couples	134	2,591	0.2	1.1	**22**
1D	Wealthy & Educated Singles In Student Areas	183	1,182	0.1	0.3	**36**
Total	**Affluent Singles & Couples In Exclusive Urban Neighbourhoods**	**453**	**4,333**	**0.4**	**3.4**	**12**
2	**Wealthy Neighbourhoods Nearing & Enjoying Retirement**					
2A	Opulent Older & Retired Households In Spacious Rural Properties	763	3,988	0.4	0.7	**56**
2B	Affluent Mature Families & Couples In Large Exclusive Detached Homes	499	3,707	0.3	1.4	**24**
2C	Affluent Mature Couples & Singles Some With School Age Children	715	8,347	0.8	1.2	**62**
2D	Wealthy Suburban Professionals In Mixed Tenure	21	346	0.0	0.4	**8**
Total	**Wealthy Neighbourhoods Nearing & Enjoying Retirement**	**1,998**	**16,388**	**1.5**	**3.7**	**41**
3	**Affluent Home Owning Couples & Families In Large Houses**					
3A	Wealthy Older Families In Spacious Suburban & Rural Detached & Semis	1,478	14,475	1.3	2.8	**47**
3B	Young & Mature Couples & Families In Large Rural Dwellings	1,022	6,508	0.6	0.8	**74**
3C	Well-Off Older Couples & Families In Large Detached & Semis	2,665	40,112	3.7	3.8	97
3D	Wealthy Mixed Households Living In Rural Communities	3,607	18,157	1.7	3.0	**56**
Total	**Affluent Home Owning Couples & Families In Large Houses**	**8,772**	**79,252**	**7.3**	**10.4**	**70**
4	**Suburban Home Owners In Smaller Private Family Homes**	**10,159**	**128,601**	**11.8**	**13.8**	**86**
4A	Executive Households In Suburban Terraces & Semis	2,348	32,741	3.0	2.4	**125**
4B	Professional Home Owners In Detached & Semi Suburbia	667	5,588	0.5	2.4	**21**
4C	White Collar Home Owners In Outer Suburbs & Coastal Areas	644	8,577	0.8	1.0	**75**
4D	Mature Owner Occupiers In Rural & Coastal Neighbourhoods	1,637	22,878	2.1	3.0	**70**
4E	Couples & Families In Modern Rural & Suburban Developments	2,529	25,331	2.3	2.2	105
4F	Mature Couples & Families In Mortgaged Detached & Semis	2,334	33,486	3.1	2.6	119
Total	**Suburban Home Owners In Smaller Private Family Homes**					
5	**Comfortable Mixed Tenure Neighbourhoods**					
5A	Singles, Couples & School Age Families In Mixed Housing	732	4,155	0.4	0.4	89
5B	Young & Older Single Mortgagees & Renters In Terraces & Flats	172	1,754	0.2	0.8	**20**
5C	Mature & Retired Singles In Areas Of Small Mixed Housing	1,530	19,050	1.8	1.6	107
5D	Young & Older Households In Coastal, Rural & Suburban Areas	137	2,108	0.2	0.9	**22**
5E	Mature Households In Scottish Industrial Suburbs & Rural Communities	0	1.4			
5F	Young & Older Households In Areas Of Mixed Tenure	552	9,492	0.9	1.1	**78**
5G	Older Couples & Singles In Suburban Family Semis	3,013	53,453	4.9	2.5	**198**
Total	**Comfortable Mixed Tenure Neighbourhoods**	**6,136**	**90,012**	**8.3**	**8.7**	**95**
6	**Less Affluent Family Neighbourhoods**					

Code	CAMEO Description	Post Codes	House Holds	Total %	Nat Total %	Index
6A	Less Affluent Communities In Areas Of Mixed Tenure	1,344	3,214	0.3	0.5	**60**
6B	Older & Mature Households In Suburban Semis & Terraces	576	6,134	0.6	3.7	**15**
6C	Mixed Households In Mostly Welsh Suburban Communities & Rural Areas	6	36	0.0	1.2	0
6D	Couples & Families With School Age & Older Children In Spacious Semis	2,366	43,254	4.0	2.7	**147**
6E	Mature Households In Less Affluent Suburban & Rural Areas	2,365	38,477	3.5	2.7	**133**
6F	Less Affluent Couples In Suburban Family Neighbourhoods	2,256	46,459	4.3	2.2	**193**
6G	Young Single & Family Communities In Small Terraces & Rented Flats	1,361	13,420	1.2	1.4	90
Total	**Less Affluent Family Neighbourhoods**	**10,274**	**150,994**	**13.9**	**14.3**	**97**
7	**Less Affluent Singles & Students In Urban Areas**					
7A	Single Mortgagees & Renters In Pre-School Family Neighbourhoods	916	17,874	1.6	2.5	**65**
7B	Singles & Families In Ethnically Mixed Inner City & Suburban Areas	0	1.2			
7C	Young Flat Dwelling Singles & Couples In Inner City Student Areas	19	467	0.0	0.7	**6**
7D	Young Singles, Couples & Students In Urban Areas	1,399	18,665	1.7	1.1	**163**
7E	Young Singles In Privately Rented & Housing Association Properties	334	5,145	0.5	0.3	**153**
Total	**Less Affluent Singles & Students In Urban Areas**	**2,668**	**42,151**	**3.9**	**5.8**	**67**
8	**Poorer White & Blue Collar Workers**					
8A	Poorer Retired Households In Owned & Rented Accommodation	1,095	19,375	1.8	1.9	94
8B	Older & Mature Households In Suburban Areas Of Mixed Tenure	1,164	21,000	1.9	2.1	91
8C	Older Households With School Age Children In Towns & Suburbs	449	5,050	0.5	3.8	**12**
8D	Poorer Young Singles In Suburban Family Areas	0	1.7			
8E	Mixed Mortgagees & Council Tenants In Outer Suburbs	3,730	62,927	5.8	3.9	**147**
8F	Singles & Couples In Small Terraced Properties	4,146	72,486	6.7	3.7	**180**
Total	**Poorer White & Blue Collar Workers**	**10,584**	**180,838**	**16.6**	**17.1**	**97**
9	**Poorer Family & Single Parent Households**					
9A	Poorer Singles In Outer Suburban Family Neighbourhoods	927	14,841	1.4	2.1	**66**
9B	Poorer Singles & Families In Mixed Tenure	2,847	28,348	2.6	2.1	**124**
9C	Suburban Scottish Households In Small Terraces & Flats	0	1.5			
9D	Ethnically Mixed Young Families & Singles In Terraced Housing	215	3,530	0.3	0.9	**35**
9E	Poorer Couples & School Age Families In Terraced & Semis	932	16,239	1.5	2.2	**67**
9F	Flat Dwellers In Council & Housing Association Accommodation	1,011	16,815	1.5	1.2	**128**
9G	Young & Older Households In Housing Association & Mortgaged Homes	751	12,425	1.1	0.9	**131**
Total	**Poorer Family & Single Parent Households**	**6,683**	**92,198**	**8.5**	**10.9**	**78**
10	**Poorer Council Tenants Including Many Single Parents**					
10A	Hi-Rise Flat Dwellers In Cosmopolitan Areas Of Mixed Tenure	27	360	0.0	0.3	**12**
10B	Council Tenants & Mortgagees In Scottish Suburbia	0	1.9			
10C	Poorer Mortgagees & Council Renters In Family Neighbourhoods	63	876	0.1	1.5	**5**
10D	Singles & Single Parents In Suburban Hi-Rise Flats	0	1.0			
10E	Mature Households In Small Terraces & Semis	10,179	183,865	16.9	3.3	**508**
10F	Poorer Singles In Local Authority Family Neighbourhoods	5,240	91,216	8.4	2.7	**314**
10G	Single Renters In Mixed Age Hi-Rise Communities	824	13,214	1.2	0.8	**150**
Total	**Poorer Council Tenants Including Many Single Parents**	**16,333**	**289,531**	**26.6**	**11.5**	**231**
	Communal Establishments In Mixed Neighbourhoods					
	Communal Establishments In Mixed	**296**	**3,507**	**0.3**	**0.4**	**75**

Code	CAMEO Description	Post Codes	House Holds	Total %	Nat Total %	Index
	Neighbourhoods					
Total	74,356	1,077,805				

2-hour Drive Time - CAMEO *UK* Summary Report.

Code	CAMEO Description	Post Codes	House Holds	Total %	Nat Total %	Index
1	**Affluent Singles & Couples In Exclusive Urban Neighbourhoods**					
1A	Opulent Couples & Singles In Executive City & Suburban Areas	314	1,132	0.0	0.3	**10**
1B	Wealthy Singles In Small City Flats & Suburban Terraces	127	714	0.0	1.7	**1**
1C	Urban Living Professional Singles & Couples	521	5,935	0.2	1.1	**16**
1D	Wealthy & Educated Singles In Student Areas	660	7,337	0.2	0.3	**71**
Total	**Affluent Singles & Couples In Exclusive Urban Neighbourhoods**	**1,622**	**15,118**	**0.4**	**3.4**	**12**
2	**Wealthy Neighbourhoods Nearing & Enjoying Retirement**					
2A	Opulent Older & Retired Households In Spacious Rural Properties	2,948	16,367	0.5	0.7	**73**
2B	Affluent Mature Families & Couples In Large Exclusive Detached Homes	1,733	12,669	0.4	1.4	**27**
2C	Affluent Mature Couples & Singles Some With School Age Children	3,078	35,687	1.1	1.2	85
2D	Wealthy Suburban Professionals In Mixed Tenure	272	4,237	0.1	0.4	**32**
Total	**Wealthy Neighbourhoods Nearing & Enjoying Retirement**	**8,031**	**68,960**	**2.0**	**3.7**	**54**
3	**Affluent Home Owning Couples & Families In Large Houses**					
3A	Wealthy Older Families In Spacious Suburban & Rural Detached & Semis	5,222	47,770	1.4	2.8	**49**
3B	Young & Mature Couples & Families In Large Rural Dwellings	4,473	21,294	0.6	0.8	**78**
3C	Well-Off Older Couples & Families In Large Detached & Semis	9,346	134,026	3.9	3.8	103
3D	Wealthy Mixed Households Living In Rural Communities	14,212	80,926	2.4	3.0	**80**
Total	**Affluent Home Owning Couples & Families In Large Houses**	**33,253**	**284,016**	**8.4**	**10.4**	**81**
4	**Suburban Home Owners In Smaller Private Family Homes**	**33,796**	**415,849**	**12.3**	**13.8**	**89**
4A	Executive Households In Suburban Terraces & Semis	7,685	106,125	3.1	2.4	**129**
4B	Professional Home Owners In Detached & Semi Suburbia	2,222	18,073	0.5	2.4	**22**
4C	White Collar Home Owners In Outer Suburbs & Coastal Areas	2,411	32,067	0.9	1.0	90
4D	Mature Owner Occupiers In Rural & Coastal Neighbourhoods	5,962	83,903	2.5	3.0	82
4E	Couples & Families In Modern Rural & Suburban Developments	7,917	77,471	2.3	2.2	103
4F	Mature Couples & Families In Mortgaged Detached & Semis	7,599	98,210	2.9	2.6	111
Total	**Suburban Home Owners In Smaller Private Family Homes**					
5	**Comfortable Mixed Tenure Neighbourhoods**					
5A	Singles, Couples & School Age Families In Mixed Housing	2,162	13,585	0.4	0.4	93
5B	Young & Older Single Mortgagees & Renters In Terraces & Flats	1,738	12,767	0.4	0.8	**48**
5C	Mature & Retired Singles In Areas Of Small Mixed Housing	4,656	51,568	1.5	1.6	92
5D	Young & Older Households In Coastal, Rural &	457	6,415	0.2	0.9	**22**

Code	CAMEO Description	Post Codes	House Holds	Total %	Nat Total %	Index
	Suburban Areas					
5E	Mature Households In Scottish Industrial Suburbs & Rural Communities	0	1.4			
5F	Young & Older Households In Areas Of Mixed Tenure	2,369	33,777	1.0	1.1	89
5G	Older Couples & Singles In Suburban Family Semis	8,040	138,395	4.1	2.5	**164**
Total	**Comfortable Mixed Tenure Neighbourhoods**	**19,422**	**256,507**	**7.6**	**8.7**	**87**
6	**Less Affluent Family Neighbourhoods**					
6A	Less Affluent Communities In Areas Of Mixed Tenure	5,106	18,088	0.5	0.5	108
6B	Older & Mature Households In Suburban Semis & Terraces	2,009	22,619	0.7	3.7	**18**
6C	Mixed Households In Mostly Welsh Suburban Communities & Rural Areas	12	95	0.0	1.2	0
6D	Couples & Families With School Age & Older Children In Spacious Semis	6,968	123,977	3.7	2.7	**135**
6E	Mature Households In Less Affluent Suburban & Rural Areas	7,060	114,764	3.4	2.7	**127**
6F	Less Affluent Couples In Suburban Family Neighbourhoods	8,056	161,065	4.7	2.2	**214**
6G	Young Single & Family Communities In Small Terraces & Rented Flats	5,705	42,743	1.3	1.4	92
Total	**Less Affluent Family Neighbourhoods**	**34,916**	**483,351**	**14.2**	**14.3**	**99**
7	**Less Affluent Singles & Students In Urban Areas**					
7A	Single Mortgagees & Renters In Pre-School Family Neighbourhoods	2,502	43,693	1.3	2.5	**51**
7B	Singles & Families In Ethnically Mixed Inner City & Suburban Areas	168	3,564	0.1	1.2	**9**
7C	Young Flat Dwelling Singles & Couples In Inner City Student Areas	250	1,406	0.0	0.7	**6**
7D	Young Singles, Couples & Students In Urban Areas	3,902	43,293	1.3	1.1	**121**
7E	Young Singles In Privately Rented & Housing Association Properties	1,007	14,864	0.4	0.3	**141**
Total	**Less Affluent Singles & Students In Urban Areas**	**7,829**	**106,820**	**3.1**	**5.8**	**53**
8	**Poorer White & Blue Collar Workers**					
8A	Poorer Retired Households In Owned & Rented Accommodation	3,705	63,666	1.9	1.9	99
8B	Older & Mature Households In Suburban Areas Of Mixed Tenure	4,587	79,947	2.4	2.1	111
8C	Older Households With School Age Children In Towns & Suburbs	1,424	16,722	0.5	3.8	**13**
8D	Poorer Young Singles In Suburban Family Areas	371	6,052	0.2	1.7	**11**
8E	Mixed Mortgagees & Council Tenants In Outer Suburbs	13,382	227,241	6.7	3.9	**170**
8F	Singles & Couples In Small Terraced Properties	17,615	286,787	8.4	3.7	**228**
Total	**Poorer White & Blue Collar Workers**	**41,084**	**680,415**	**20.0**	**17.1**	**117**
9	**Poorer Family & Single Parent Households**					
9A	Poorer Singles In Outer Suburban Family Neighbourhoods	2,101	33,295	1.0	2.1	**48**
9B	Poorer Singles & Families In Mixed Tenure	9,854	116,073	3.4	2.1	**162**
9C	Suburban Scottish Households In Small Terraces & Flats	0	1.5			
9D	Ethnically Mixed Young Families & Singles In Terraced Housing	5,915	82,806	2.4	0.9	**265**
9E	Poorer Couples & School Age Families In Terraced & Semis	3,923	65,099	1.9	2.2	87
9F	Flat Dwellers In Council & Housing Association Accommodation	2,016	32,748	1.0	1.2	**80**
9G	Young & Older Households In Housing Association & Mortgaged Homes	1,564	24,391	0.7	0.9	82
9	**Poorer Family & Single Parent Households**	**25,373**	**354,412**	**10.4**	**10.9**	**95**
10	**Poorer Council Tenants Including Many Single Parents**					
10A	Hi-Rise Flat Dwellers In Cosmopolitan Areas Of Mixed Tenure	376	4,440	0.1	0.3	**49**
10B	Council Tenants & Mortgagees In Scottish Suburbia	0	1.9			

Code	CAMEO Description	Post Codes	House Holds	Total %	Nat Total %	Index
10C	Poorer Mortgagees & Council Renters In Family Neighbourhoods	4,483	88,145	2.6	1.5	**171**
10D	Singles & Single Parents In Suburban Hi-Rise Flats	6	79	0.0	1.0	0
10E	Mature Households In Small Terraces & Semis	19,949	359,129	10.6	3.3	**318**
10F	Poorer Singles In Local Authority Family Neighbourhoods	10,708	202,000	6.0	2.7	**223**
10G	Single Renters In Mixed Age Hi-Rise Communities	2,162	36,535	1.1	0.8	**133**
Total	**Poorer Council Tenants Including Many Single Parents**	**37,684**	**690,328**	**20.3**	**11.5**	**177**
	Communal Establishments In Mixed Neighbourhoods					
	Communal Establishments In Mixed Neighbourhoods	**763**	**8,379**	**0.2**	**0.4**	**50**
Total		243,773	3,364,155			

Cameo Classifications Which Closely Match RSPB Visitor Profile

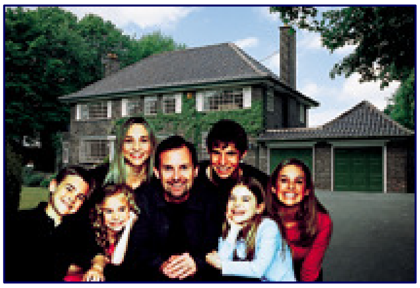
3C: Well-Off Older Couples & Families In Large Detached & Semis

3.69% of UK Households

Geodemographic & Socio-economic Overview:
These small town, suburban and rural areas are home to wealthy couples, some with school age children. This is a highly educated population which comprises a mix of established professionals and managers and those just founding their white and blue collar careers. The number of Directors living in these areas is slightly higher than average. The incidence of dual incomes however is much higher in this group than the UK average.

Industries worked in vary from Secondary manufacturing sectors to Tertiary service sectors to information based Quaternary sectors. In these areas, levels of unemployment are half the national average.

These primarily Caucasian areas are very sparsely populated where detached and semi-detached properties dominate. Although these properties are very large they command only an average price for the type of house. They are either owned outright or through a mortgage agreement. These are very settled areas with many living in the same house for eleven years or longer.



4E: Couples & Families In Modern Rural & Suburban Developments

2.04% of UK Households

Geodemographic & Socio-economic Overview:
Compared to previous categories, overall these areas are home to younger couples and families with pre-school and school age children. Again population densities in these suburban, rural and seaside areas are much lower than the UK norm.

We see these owner occupiers living in a mix of modern and sizable flats, semi-detached and detached residences. House prices lie around the average with council tax bands generally being C, D or E. Few have lived in these areas for more than three years and many have only recently moved there.

This populace has had a good education, with a significant proportion of residents reaching degree level or higher. They tend to be an aspiring group either starting out in their careers or reaching comfortable heights. Whilst some have professional appointments others have reasonably well paid white and blue collar jobs. There are significantly more Directors to be found in these neighbourhoods than across the nation as a whole. In addition to working in the manufacturing sector, employment in the tertiary and quaternary sectors also features. On the whole these are an economically active population with unemployment levels much lower than the average.

5G: Older Couples & Singles In Suburban Family Semis

2.37% of UK Households

Geodemographic & Socio-economic Overview:
This category is home to a mixed population of couples, singles and families of mixed ages. Children are typically of school age. These residents primarily live in detached and semi-detached properties on the outskirts of town and in rural villages where population densities are generally quite sparse.

Many of their homes are larger than average but have a market price below the national average. These are home owning areas where nearly half the population owns their property outright and the others have a mortgage outstanding. Many have lived in the same house for over ten years.

These stable suburban neighbourhoods are predominantly home to a poorly educated population of manual and office workers. Some are also on the first rungs of pursuing a professional career. We see a larger proportion of households than average bringing in a dual income. In terms of the industries that they work in, we see a mix of manufacturing industry alongside service, IT and financial industries. Levels of unemployment in these communities are almost half the national average.

6D: Couples & Families With School Age & Older Children In Spacious Semis

2.60% of UK Households

Geodemographic & Socio-economic Overview:
The large majority of this group live in larger than average semi-detached properties located in a combination of suburban neighbourhoods, rural villages and coastal towns. Most have purchased their homes by way of a mortgage, although some of the older end have paid up their mortgages and now own their properties outright.

Within these communities, properties are by and large priced below the national average.

Many of the houses in these areas enjoy spacious gardens therefore resulting in very low population densities compared with more urban segments. These are well established and settled neighbourhoods where we see little residential turnover.

These localities are characterised by younger and middle-aged households. We see either school age or older families present in these groups alongside couples. Typically they find work across a mixture of industrial sectors including manufacturing, service, retail and finance in positions that vary from professional to administration and manual work. Levels of unemployment are in most cases lower than average rates.

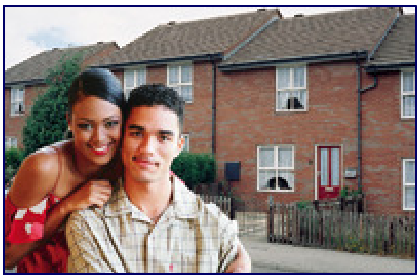
8F: Singles & Couples In Small Terraced Properties

3.67% of UK Households

Geodemographic & Socio-economic Overview:
These principally terraced districts are home to a group of couples and singles, some whom are rearing a family as lone parents. Their demographic profile shows a mixture of age bands from twenty up to sixty, but a distinctive section of this populace are younger than forty-four. Children's ages vary although we see a bigger distribution of pre-school age children in this group than we see in a national profile.

Although dwelling in a mix of urban and suburban areas, population densities are somewhat lower within these neighbourhoods than the UK norm. Although about forty percent of these consumers have acquired their home through a mortgage, private rental agreements are not uncommon. Most homes in these areas are somewhat smaller than the average property. They are categorised in council tax band A and therefore they constitute some of the cheapest properties in the UK. Sales turnover of properties in these areas varies.

Few within this group have continued their education beyond compulsory schooling and most have now established themselves in a range of office and manual occupations, many requiring only partial skills or no specialist skills at all. It is not unexpected that we see short-term unemployment rates creeping above the national average.



10F: Poorer Singles In Local Authority Family Neighbourhoods

2.58% of UK Households

Geodemographic & Socio-economic Overview:
These areas are typified by impoverished council estates found in some of the most deprived areas in and around our towns and cities. Much of the housing is of poor quality and in bad repair and these areas are characterised by their smaller than average terraced and semi-detached properties.

The greater majority are still council owned and are occupied by a tenant population who are in many cases reliant on the welfare state for their wellbeing. In relative terms, a very small proportion of this populace have managed to raise a mortgage and have purchased their home from the local authority. As expected though property prices in these areas are extremely low.

These regions are home to a very poorly qualified population, which is dominated by singles, families and single parent households, all aged below retirement age. Employment for those that can find work is typically in a range of manual, semi-skilled and unskilled roles. These areas do however exhibit over twice the average number of parents remaining at home to rear the children.

APPENDIX 3: RSPB MEMBERS BY ADMINISTRATIVE AREA AND DRIVE TIME

Administrative Area	Members Count	Est Drive Time (Hours)			Total 0-1 Hour	Total 1-2 Hours	Total 2-3 Hours
Barnsley	3,051		2			3051	
Blackburn With Darwen	1,336			3			1336
Blackpool	1,123			3			
Bolton	2,972			3			2972
Bradford	6,166		2			6166	
Bury	2,350			3			2350
Calderdale	3,111		2			3111	
Cheshire	17,440			3			17440
County Durham	5,009	1			5009		
Cumbria	13,250		2	3		6625	6625
Darlington	1,527	1			1527		
Derbyshire	16,831			3			16831
Doncaster	3,747		2			3747	
East Lothian	1,725			3			1725
East Riding Of Yorkshire	8,122		2			8122	
Gateshead	1,305	1			1305		
Halton	1,063			3			1063
Hartlepool	510	1			510		
Kingston Upon Hull	1,871		2			1871	
Kirklees	5,826		2			5826	
Knowsley	706			3			706
Lancashire	21,582		2	3		10791	10791
Leeds	9,761		2			9761	
Leicester	2,079			3			2079
Leicestershire	14,318			3			14318
Lincolnshire	15,624			3			15624
Liverpool	2,788			3			2788
Manchester	2,677			3			2677
Middlesbrough	925	1			925		
Newcastle Upon Tyne	1,915	1			1915		
North East Lincolnshire	1,880			3			1880
North Lincolnshire	2,903		2	3		1451	1451
North Tyneside	1,547	1			1547		
Northumberland	5,024		2			5024	
North Yorkshire	17,039	1	2		8520	8520	
Nottinghamshire	15,094			3			15094
Oldham	1,980			3			1980
Peterborough	2,560			3			2560
Redcar & Cleveland	1,583	1			1583		
Rochdale	2,021			3			2021
Rotherham	3,416		2			3416	
Rutland	1,257			3			1257
Salford	1,656			3			1656
Scottish Borders	2,711			3			2711
Sefton	3,486			3			3486
Sheffield	7,851		2			7851	
South Tyneside	716	1			716		

Administrative Area	Members Count	Est Drive Time (Hours)			Total 0-1 Hour	Total 1-2 Hours	Total 2-3 Hours
St. Helens	1,732			3			1732
Staffordshire	15,450			1			15450
Stockport	5,459			3			5459
Stockton-On-Tees	1,684	1			1684		
Stoke-On-Trent	1,801			3			1801
Sunderland	1,426	1			1426		
Tameside	2,035			3			2035
Trafford	3,689			3			3689
Wakefield	4,142		2			4142	
Warrington	3,025			3			3025
Wigan	2,853			3			2853
Wirral	4,843			3			4843
York City	4,379	1	2			2190	2190
Total	**295,952**				26667	91665	176498

APPENDIX 4: ESTIMATE OF SPENDING BY VISITORS FROM OUTSIDE OF THE NORTH EAST REGION

Low Visitor Number Estimate

Market Segment	Number of Visits	Out of Region Day Visits	Spend Per Head	Total	Out of region Staying Visits	Average Stay	Spend Per Day	Total
Residents 0-1 hour	17,600	0	£19	£0	0	0	0	0
Residents 1-2 hours	12,800	6,400	£19	£121,600	0	0	0	0
Tourists in Tees Valley	3,200	3,040	£19	£57,760	160	1	£72.40	£11,584
Tourists in adjacent sub-regions	16,800	14,364	£19	£272,916	840	1	£72.40	£60,816
Transit tourists	4,800	3,840	£19	£72,960	960	1	£72.40	£69,504
Education 0-1 hours	3,200	640	£5	£3,200	0	0	0	0
Education 1-2 hours	2,400	1,080	£5	£5,400	0	0	0	0
RSPB members 0-2 hours	8,000	6,400	£19	£121,600	0	0	0	0
RSPB members 2-3 hours	2,400	1,536	£19	£29,184	480	1	£72.40	£34,752
RSPB members 3+ hours	2,400	480	£19	£9,120	1,920	2	£72.40	£278,016
RSPB groups	1,600	1,024	£19	£19,456	320	1	£72.40	£23,168
Other birdwatchers 0-2 hours	3,200	2,560	£19	£48,640	0	0	0	0
Other birdwatchers 2-3 hours	800	512	£19	£9,728	160	2	£72.40	£23,168
Other birdwatchers 3+ hours	800	0	£19	£0	800	2	£72.40	£115,840
Total	80,000	41,876		£771,564	5,640			£616,848

Medium Visitor Number Estimate

Market Segment	Number of Visits	Out of Region Day Visits	Spend Per Head	Total	Out of region Staying Visits	Average Stay	Spend Per Day	Total
Residents 0-1 hour	20,900	0	£19	£0	0	0	0	0
Residents 1-2 hours	15,200	7,600	£19	£144,400	0	0	0	0
Tourists in Tees Valley	3,800	3,610	£19	£68,590	190	1	£72.40	£13,756
Tourists in adjacent sub-regions	19,950	17,057.25	£19	£324,088	997.5	1	£72.40	£72,219
Transit tourists	5,700	4,560	£19	£86,640	1,140	1	£72.40	£82,536
Education 0-1 hours	3,800	760	£5	£3,800	0	0	0	0
Education 1-2 hours	2,850	1,282.5	£5	£6,413	0	0	0	0
RSPB members 0-2 hours	9,500	7,600	£19	£144,400	0	0	0	0
RSPB members 2-3 hours	2,850	1,824	£19	£34,656	570	1	£72.40	£41,268
RSPB members 3+ hours	2,850	570	£19	£10,830	2,280	2	£72.40	£330,144
RSPB groups	1,900	1,216	£19	£23,104	380	1	£72.40	£27,512
Other birdwatchers 0-2 hours	3,800	3,040	£19	£57,760	0	0	0	0
Other birdwatchers 2-3 hours	950	608	£19	£11,552	190	2	£72.40	£27,512
Other birdwatchers 3+ hours	950	0	£19	£0	950	2	£72.40	£137,560
Total	95,000	49,727.75		£916,232	6,697.5			£732,507

High Visitor Number Estimate

Market Segment	Number of Visits	Out of Region Day Visits	Spend Per Head	Total	Out of region Staying Visits	Average Stay	Spend Per Day	Total
Residents 0-1 hour	24,200	0	£19	£0	0	0	0	0
Residents 1-2 hours	17,600	8,800	£19	£167,200	0	0	0	0
Tourists in Tees Valley)	4,400	4,180	£19	£79,420	220	1	£72.40	£15,928
Tourists in adjacent sub-regions	23,100	19,750.5	£19	£375,260	1,155	1	£72.40	£83,622
Transit tourists	6,600	5,280	£19	£100,320	1,320	1	£72.40	£95,568
Education 0-1 hours	4,400	880	£5	£4,400	0	0	0	0
Education 1-2 hours	3,300	1,485	£5	£7,425	0	0	0	0
RSPB members 0-2 hours	11,000	8,800	£19	£167,200	0	0	0	0
RSPB members 2-3 hours	3,300	2,112	£19	£40,128	660	1	£72.40	£47,784
RSPB members 3+ hours	3,300	660	£19	£12,540	2,640	2	£72.40	£382,272
RSPB groups	2,200	1,408	£19	£26,752	440	1	£72.40	£31,856
Other birdwatchers 0-2 hours	4,400	3,520	£19	£66,880	0	0	0	0
Other birdwatchers 2-3 hours	1,100	704	£19	£13,376	220	2	£72.40	£31,856
Other birdwatchers 3+ hours	1,100	0	£19	£0	1,100	2	£72.40	£159,280
Total	110,000	57,579.5		£1,060,901	7,755			£848,166