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**Developing Nature Tourism in Greater Lincolnshire:
A report to the Greater Lincolnshire Nature Partnership**

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1 Introduction

1.1 Purpose of this Report

This report has been prepared by a team from the School of Events, Tourism and Hospitality at Leeds Beckett University on behalf of the Greater Lincolnshire Nature Partnership (GLNP). The team was commissioned by the GLNP to provide an estimate of the current value of nature-based tourism across Greater Lincolnshire and to explore how the existing nature and wildlife tourism product could be enhanced in the future to stimulate an increase in its overall economic impact for the region.

Specific objectives for the study were to:

- Collate existing statistics on the volume and value of tourism across Greater Lincolnshire and on wildlife and nature tourism in the UK in general, and to use this information to prepare a baseline assessment of the current value of nature tourism to the economy of Greater Lincolnshire
- Assess the potential for developing the area's nature tourism product as an integral component of the wider tourism economy
- Identify barriers to achieving this potential (specific and particular)
- Provide guidance on the steps that need to be taken to overcome these barriers and achieve this potential

Building on discussions with Fran Smith of the GLNP and on a review of relevant academic and professional literature, we have defined nature tourism as tourism and day visitor activity where the primary or an ancillary purpose is either to view wildlife in a natural setting or to engage with the natural environment in a purposive manner (including enjoying views of the landscape as well as observing habitats). How this definition fits in with broader academic perspectives on nature tourism and wildlife tourism, and how it aligns with official statistics on engagement with natural heritage, is explored in Section 3 of the report. The study area covers the County of Lincolnshire, North Lincolnshire and North East Lincolnshire (sometimes referred to in this report as the region or the study area).

The report will support future participation by the GLNP in its work on strategic issues across agri-business; spatial planning; tourism and public health - there is considerable evidence that engagement with natural heritage can deliver significant public health benefits (see for example New Economics Foundation, 2012; Sander-Regier & Etowa, 2014; Neal, 2015).

The contents of this report are based on a combination of primary and secondary research with primary research include two online questionnaire surveys – one of the GLNP stakeholders and one of Lincolnshire Wildlife Trust (LWT) members – a programme of site visits to key nature tourism locations around the study area and a programme of face to face and telephone interviews with key contacts identified by the GLNP. Details of consultees and sites visited during the research programme are appended.

1.2 Structure of this report

- Section 2 of this report presents an overview of the current nature tourism product of the study area and provides an initial assessment of where growth might be targeted in the future
- Markets for nature tourism from an academic and more pragmatic perspective are discussed in Section 3 which also presents our initial estimates on the current baseline of nature tourism activity across the study area.
- An assessment of the current economic value of nature-based tourism is provided in Section 4

- A summary of the findings of our questionnaire surveys are presented in Section 5 and provide a useful insight into how the GLNP stakeholders as well as a self-selecting sample of nature lovers with an interest in Greater Lincolnshire perceive the areas' nature-based tourism product (more detailed findings of the consultation programme are appended)
- Section 6 summarises the outcomes of consultations with the GLNP stakeholders
- A summary SWOT analysis and discussion of issues raised is presented in Section 7 along with a suite of opportunities for action

2 The Existing Nature Tourism Product

2.1 Introduction

The region (shown in Figure 1) has a rich and varied natural heritage, despite the widely held perception that Lincolnshire itself is flat and largely made up of The Fens (Arkenford, 2009).

Figure 1: The study area



Source: <http://www.businesslincolnshire.com/media/render/b4dab80854b365b4e2c669a5546b18b3/> accessed 8/1/16

Confirming the broad range of landscapes available is the fact that Greater Lincolnshire includes no less than ten National Character Areas (NCAs) as follows:

- | | | | | | |
|--------|------------------------------|--------|----------------------------|--------|----------------------------|
| NCA 39 | Humberhead Levels | NCA 43 | Lincolnshire Wolds | NCA 46 | The Fens |
| NCA 41 | Humber Estuary | NCA 44 | Central Lincolnshire Vale | NCA 47 | Southern Lincolnshire Edge |
| NCA 42 | Lincolnshire Coast & Marshes | NCA 45 | Northern Lincolnshire Edge | NCA 48 | Trent and Belvoir Vales |
| NCA 75 | Kesteven Uplands | | | | |

National Character Areas help landscape planners and other professionals to protect, enhance and increase public engagement with the varied, at times spectacular and always changing scenery of the UK (Natural England, 2014). One of the objectives of this report has been to identify product development or marketing initiatives that include every one of these NCAs at least once in order to promote a spread of opportunity across the whole of the study area. A map showing the NCAs that cover the study area is presented in Appendix 5.

2.2 Locations for engaging with nature

In terms of opportunities to enjoy the natural heritage of Greater Lincolnshire, there is a wide range of locations across the study area that are already promoted as wildlife destinations, provide a range of visitor facilities, and as a result already accommodate significant numbers of people who are able to enjoy the wildlife, habitats, views and the personal benefits that spending time in the countryside can bring. These locations cover a range of different landscape types and include:

- Chambers Farm Wood, Wragby – one of the main access points to the Bardney Limewoods National Nature Reserve
- Hartsholme Country Park/Swanholme Lakes Local Nature Reserve, City of Lincoln
- Crowle Moor Nature Reserve, near Scunthorpe
- Donna Nook National Nature Reserve, Donna Nook
- Far Ings National Nature Reserve, Barton on Humber
- Frampton Marshes, Boston
- Gibraltar Point National Nature Reserve, Skegness
- Snipe Dales Country Park & Nature Reserve, Horncastle
- Whisby Nature Park, City of Lincoln

The above list is not meant to be exhaustive by any means, but is provided to demonstrate the broad range of nature tourism experiences already possible within Greater Lincolnshire.

Visitor statistics are not collected for all of the above locations, thus it is not possible at present to prepare a comprehensive assessment of the volume of visitor activity at these sites. However, given typical leisure day trip-making patterns in the UK (see Section 3) it is likely that whilst there are a number of key locations that will attract tens of thousands of visitors per annum (for instance, it is reported by LWT that around 60,000 visitors per annum go to Donna Nook to view the seals in late autumn), most of the public engagement with the natural heritage of Greater Lincolnshire will take place on casual country walks on the region's extensive network of Public Rights of Way or on trips to the coast, to country parks and other green spaces. Similarly, more commodified nature tourism products such as farm parks, donkey sanctuaries and even aquaria also provide an opportunity for visitors to engage with wildlife and the natural environment.

2.3 Managing Greater Lincolnshire's natural environment

As indicated above, there are a range of landscape types across the study area and a broad range of locations where access to nature is possible and where engagement is actively encouraged by LWT, RSPB, the Forestry Commission, local authorities, other public sector agencies, conservation interest groups and individual landowners.

The County Council has a statutory duty in terms of protecting and managing biodiversity and nationally important landscapes such as the Lincolnshire Wolds Area of Outstanding Natural Beauty (AONB) and the current strategy document for the natural environment of Lincolnshire (Lincolnshire County Council, 2012) has identified a number of priority strategic areas for future partnership activity:

- The Lincolnshire Wolds AONB
- The Lincolnshire Limewoods

- The Lincolnshire Coastal Country Park
- Lincolnshire Coastal Grazing Marshes
- Trent Vale

The County Council has also committed to maintaining its partnership with LWT at Snipe Dales; Gibraltar Point NNR, Whisby Nature Park and other local sites. Thus there is likely to be considerable support at a strategic level for any initiatives that promote public understanding and enjoyment of the natural heritage across large areas of the study area.

In the northern part of the study area, there is considerable investment by North East Lincolnshire Council and North Lincolnshire Council at, for instance, the Cleethorpes Discovery Centre and Far Ings respectively.

However, much of the responsibility for maintaining the landscapes of Lincolnshire remains with private landowners – farming and forestry interests in particular - and also with the internal drainage boards. This is particularly the case in the southern part of the study area where there are fewer sites that are actively managed and promoted for nature conservation and for public access at the same time. Thus in most cases, any recommendations for action contained in this report must pay heed to the requirements and aspirations of existing land and water management interests.

The relative importance doesn't just sit with one habitat but with a range of habitats including; grassland, wetland, woodland, coastal and estuarine locations (mudflats, saltmarshes and sand dunes). Within nature reserves, those most accessible and attractive to visitors are coastal and estuarine with extensive wetlands and woodlands inland. Grassland and heathland nature reserves are also available to the visitor. In marketing and product development terms this is significant, since there is already widespread awareness amongst current and potential visitors of the wetland habitat of the Fens (Arkenford, 2009) and there is considerable research evidence that woodland environments are one of the more popular locations for countryside recreation because they offer changing experiences through the seasons and in different types of weather, but also because of the peace and quiet available in such places (Broadhurst, 2001). Certainly there is support in several quarters to increase interest and use of many of Greater Lincolnshire's water bodies for tourism.

2.4 Summary

This brief overview of the study area has confirmed that Greater Lincolnshire's nature tourism potential is supported by the presence of a wide variety of landscape types, most of which can already be accessed at some of the key 'point' resources that are actively managed for public engagement as well as habitat and broader environmental protection purposes. In the following section we consider how the nature tourism market can be segmented, and seek to identify current levels of engagement with the countryside in its broadest sense.

3 Who is the nature tourist in Greater Lincolnshire?

3.1 Introduction

This section commences with a brief review of some of the key academic literature on nature tourism in order to help identify the range of market segments that might be attracted to Greater Lincolnshire's nature tourism product. We also illustrate how the definition of nature tourism adopted for this study (Section 1.1) reflects this thinking. Thereafter we offer an overview of existing visitor data relating to all or parts of the study area in order to support the projections on the volume of nature tourism activity across Greater Lincolnshire at present.

3.2 Academic perspectives on nature tourism

In one of the classic academic texts on nature and wildlife tourism, Newsome et al (2005) argue that travel to natural areas, whether by tourists (i.e. those staying overnight in a destination) or by day visitors on an excursion from home, can be categorised according to the relationship between the specific activities undertaken and nature itself. They identify three dimensions of what they refer to as natural area tourism (i.e. tourism that takes place in the natural environment):

- Activities or experiences for which the natural setting is incidental. In other words, the tourist could do what they are doing in a myriad of different destination types and they just happen to be in the countryside, wilderness or other type of natural area. Typical segments of the market here are the various forms of adventure tourism
- Those activities that are dependent on nature and where the natural resource provides the focus for the activity, such as wildlife viewing, ornithology or even hiking. Newsome et al (2005) tend to refer to this as nature-based tourism
- Those activities that are enhanced by nature: whilst engagement with nature isn't the primary purpose of the excursion, trip or visit; being in a natural setting adds value to the experience. Many informal recreational activities, such as jogging or cycling to keep fit, as well as excursions and day trips from home, could for instance fall into this grouping

As indicated in section 1 of this report, the emphasis identified early on by the GLNP was on a definition of nature tourism as tourism and day visitor activity where the primary or an ancillary purpose is either to view wildlife in a natural setting or to engage with the natural environment in a purposive manner (including enjoying views of the landscape as well as observing habitats).

This definition broadly matches the middle one of these Newsome et al's three typologies – what they refer to as nature-based tourism. Their much-used diagram locating the main types of nature-based tourism within the broader frame of natural area tourism forms the basis of Figure 3, overleaf, though we have amended their original diagram slightly to reflect more clearly the distinctions made within this research. It is important to note that Newsome et al (2005) further argue that in nature-based tourism, the whole landscape and surrounds is the primary focus of tourism and that as a concept it is therefore more holistic than wildlife viewing, where the emphasis tends to be more on observing particular species. Thus they treat wildlife viewing as a sub-set of nature-based tourism.

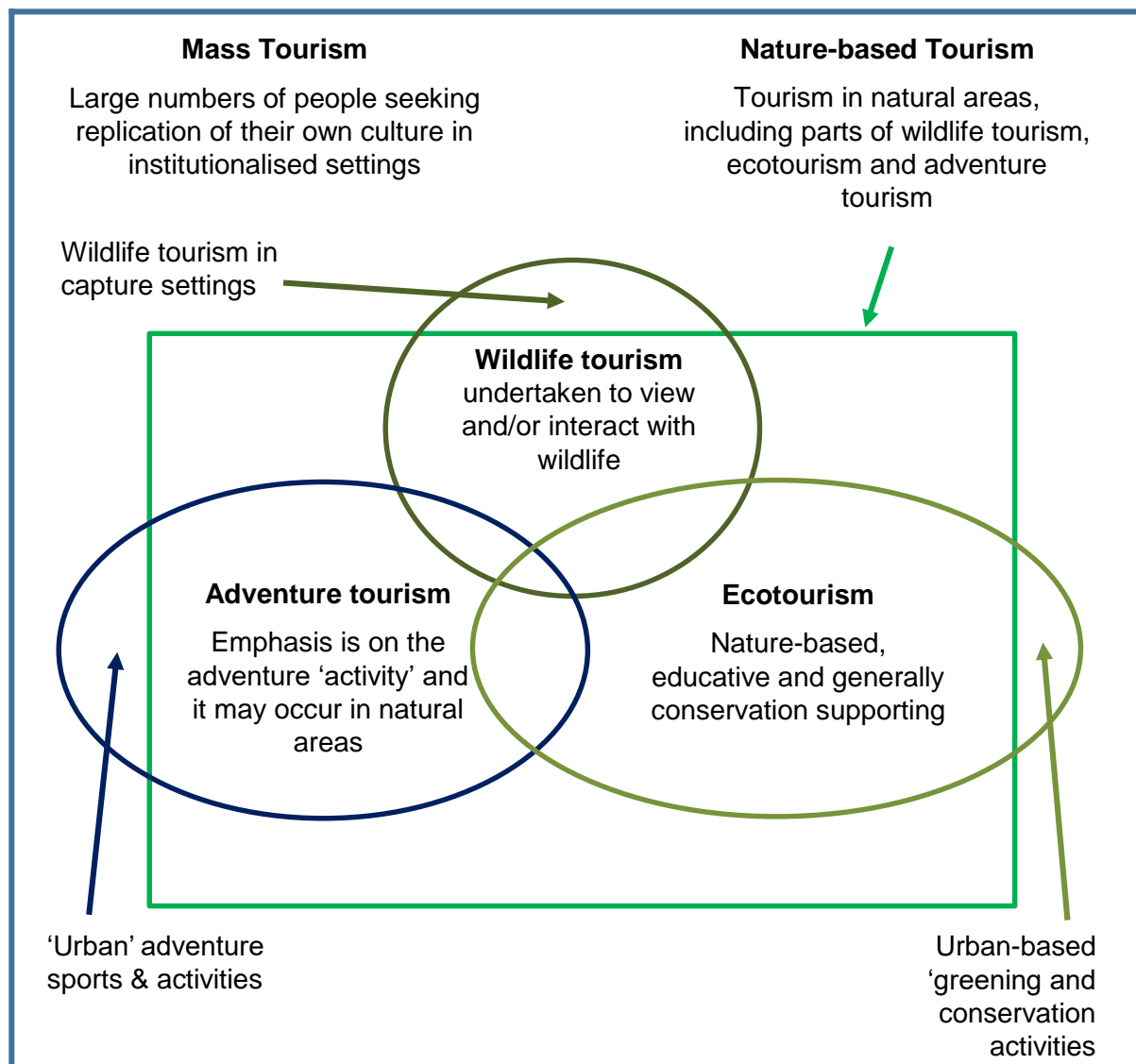
So for the purpose of this research study, purposive trips to the countryside or to the coast to experience the natural environment (or indeed the weather) are included within our definition, as are recreational visits to the coast and countryside where the primary purpose is to appreciate the setting.

In many surveys and reports reviewed for this study, there is a blurring of the lines when considering activities like dog walking, for instance. Where a dog walk takes place in the lanes or paths around home and is a regular, daily activity, some authors tend to exclude this from definitions of nature-based tourism but where a special trip is made to a different countryside

location, it may be included. Similarly, where an element of wildlife viewing (e.g. bird watching) occurs during a dog walk, even if it is by chance, there is a strong argument for including it within the parameters of nature tourism.

To facilitate the discussion (and indeed later calculations of the current volume and value of nature tourism within Greater Lincolnshire) a distinction is proposed between activities where wildlife viewing or engaging purposively with the natural environment is the primary purpose of the trip, and those where this is a secondary purpose.

Figure 3: Categorisation of nature-based tourism, adapted from Newsome (2005)



The main learning point from our adaptation of Newsome et al's approach to modelling natural area tourism and its constituent parts (Figure 3) is to consider that the setting can be as important as the activities undertaken whilst on holiday in a destination, or on a day trip from home.

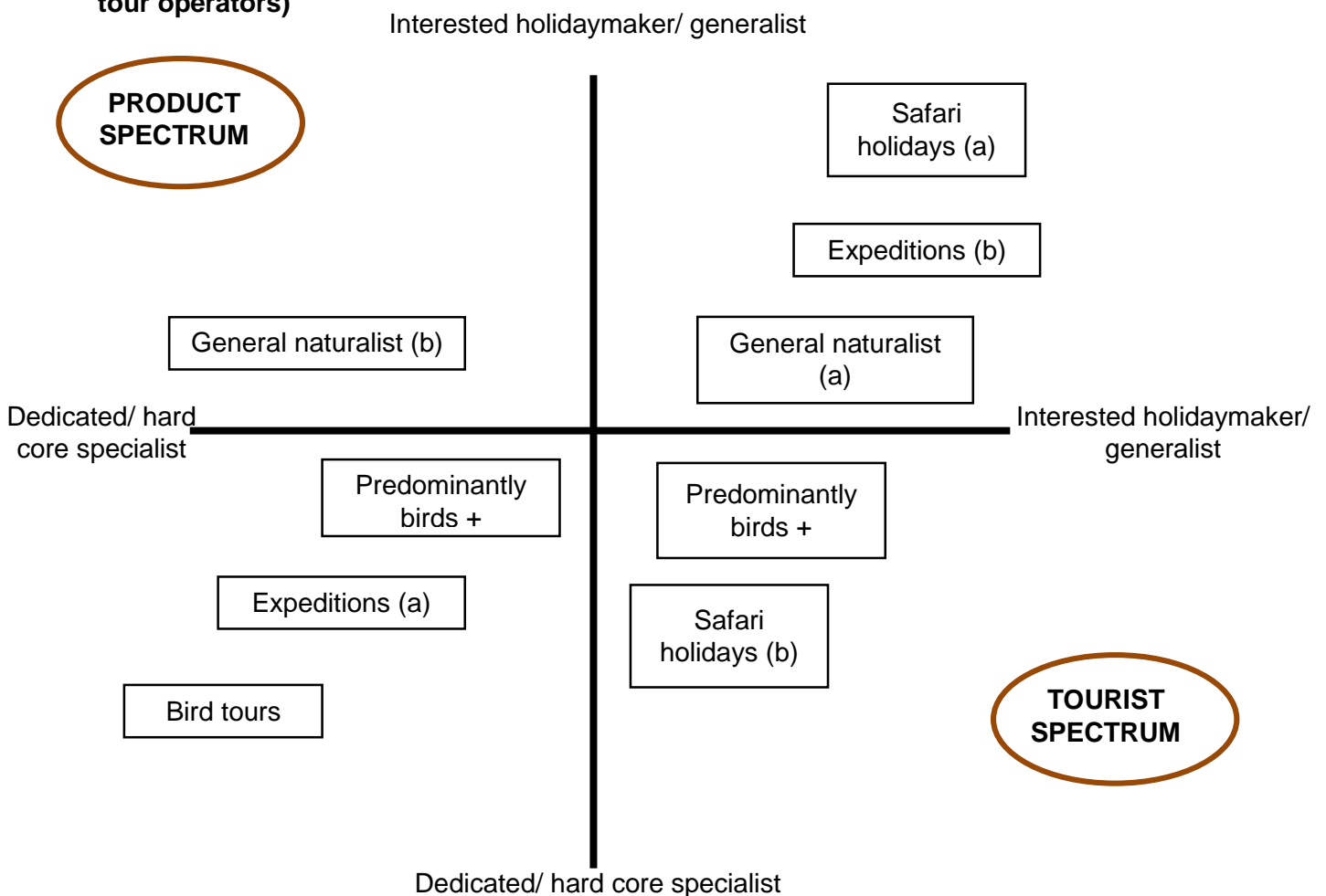
Moreover, there is an implication that there are several discrete segments in the nature tourism market, but that from time to time either the experience or the tourist themselves migrates from one mode in to another.

Other attempts to segment wildlife tourists in particular (and this is important in the context of Greater Lincolnshire because of the seal colony at Donna Nook and the importance of much of the coastline for migratory birds) have been carried out by Curtin & Wilkes (2005) who based their work on an examination of tour operators (Figure 4), and by the International Centre for Tourism and Hospitality Research (2010) who carried out research with tourists in Scotland (Figure 5).

Both of these papers seek to define wildlife tourists according to the motivations of the individuals involved; their level of interest in wildlife in general; the importance of specific wildlife species to the overall trip and the level of autonomy in planning and making their trip.

Schematics showing these two approaches to segmenting the specific wildlife tourism market are provided below to provide a context for the recommendations put forward later in this report.

Figure 4: Segmentation according to level of interest in wildlife (based on activities of tour operators)



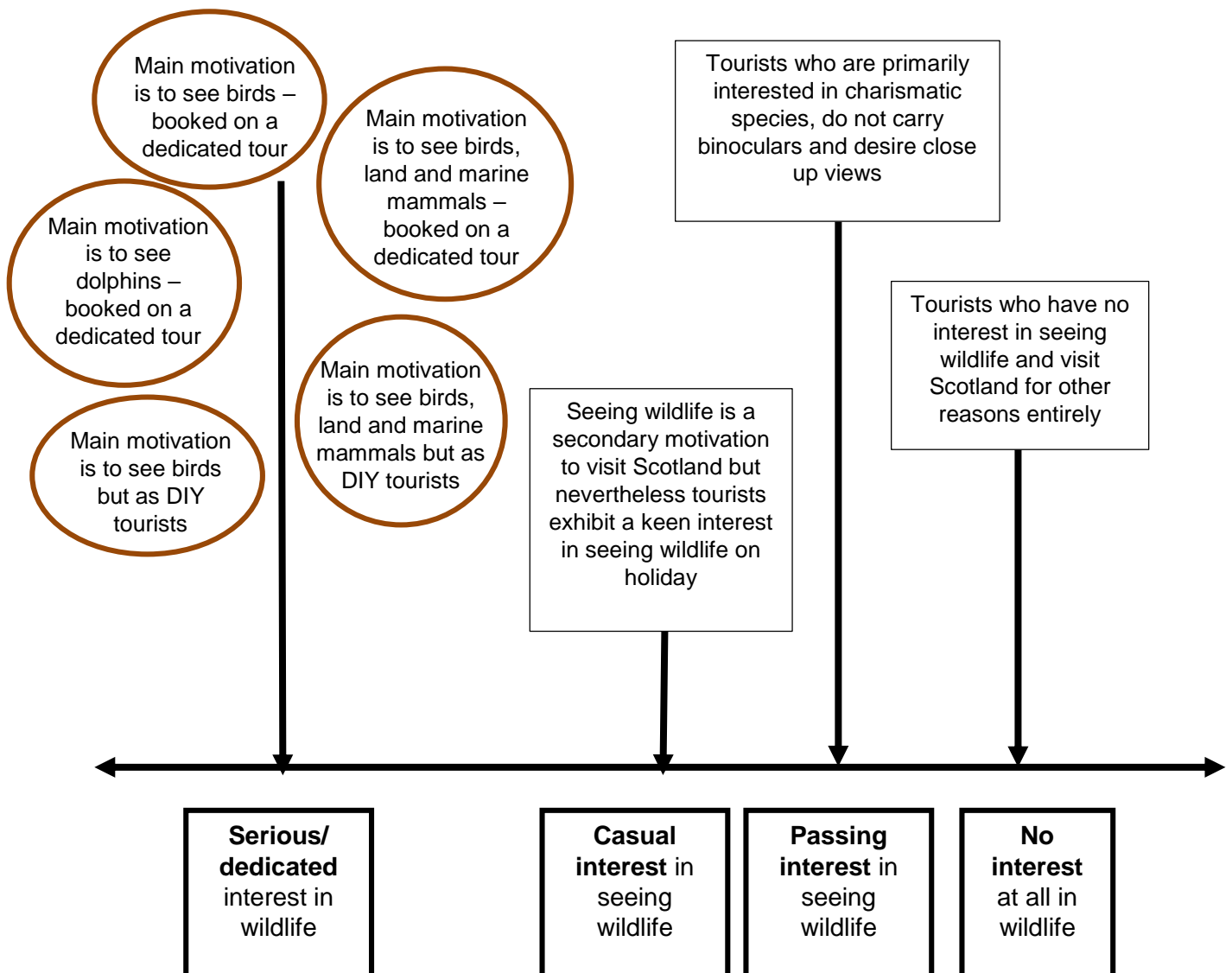
Source: Curtin & Wilkes, 2005

From Figure 4, it appears that Curtin and Wilkes' exploration of the commodification of nature tourism by tour operators has identified a number of broad types of product that can be tailored to meet the needs of either a specialist market or a more generalist market. These products are:

- Safari holidays
- Expeditions
- General naturalist holidays
- Trips that are predominantly about viewing birds
- Trips that are exclusively about viewing birds

Only this latter product is tailored for the dedicated/ hard core specialist – it is possible to develop and deliver tours that though predominantly based around birds, can still appeal to a more general market. One could argue that from the perspective of developing products based around Greater Lincolnshire's nature tourism assets, the greatest emphasis should be on identifying, packaging and marketing products that meet the needs of generalist naturalists, and which may or may not include an animal of bird viewing.

Figure 5: Segmentation of Scottish Wildlife Tourists



Source: International Centre for Tourism and Hospitality Research, 2010

This final approach to segmentation by the International Centre for Tourism and Hospitality Research (ICTHR) presented in Figure 5 provides a useful continuum along which to place consumers, from those at the far right of the line with no interest at all in wildlife to those towards the left end of the continuum, with a passion for wildlife. Thinking in terms of the objectives of this report for the GLNP, which is to identify opportunities to enhance the contribution of Greater Lincolnshire's natural heritage assets to the regional economy, then conceptually we need to think about moving Lincolnshire's existing tourists and day visitors from right to left along this continuum. This is where it is possible to develop packages that commodify the nature tourism product in a way that can be sold in some way to visitors. These are not necessarily 'package tours' but could include special nature tourism events that are promoted in partnership with accommodation providers (to encourage overnight stays instead of day visits); or working with accommodation operators to increase the resources they have available for their guests to use when enjoying the countryside of Greater Lincolnshire – examples could include binoculars and bird books for guests to borrow during their stay.

If one extends the thinking a little bit further to consider local residents as well as tourists, then it implies that there is scope also for moving residents who may have no interest in the natural environment at present some little way left along the continuum so that they are encouraged to take at least a passing interest in their surrounding environment. This is totally aligned with the broader aspirations of the GLNP to make the region a nicer place to live and work in, as well as to visit!

3.3 Existing data on engagement with Greater Lincolnshire's natural heritage resources

The following text attempts to provide an estimate of the overall volume of current visitor activity associated with enjoying the natural heritage assets of Greater Lincolnshire, and draws on a range of previously published research to do so.

The STEAM model¹ is an approach to calculating the economic impact of tourism in destinations and is widely used by UK local authorities and other public sector agencies. The most recent STEAM data for Greater Lincolnshire (Global Tourism Solutions (UK) Ltd, 2015) indicates an overall volume of around 4.3 million tourist trips a year. Of these, just over one-quarter are to serviced accommodation, one-third to friends and relatives and the remaining 39% to non-serviced accommodation such as static caravans or self-catering properties (Figure 6). The overall economic impact of this is estimated to be some £976 million, equivalent to just over £225 per tourist trip.

Figure 6: Volume of overnight tourism in Greater Lincolnshire, 2014

	Serviced	Non-Serviced	SFR²	All Staying Visitors
Trips 2014	1,185,235	1,697,278	1,449,487	4,332,000
% of all trips	27.4%	39.2%	33.5%	100%

Source: *Global Tourism Solutions (UK) Ltd (2015)*

Added to this should be the day visits made by residents of the region, or by people living elsewhere but coming into Greater Lincolnshire for the day. The same STEAM report (Global

¹ STEAM stands for Scarborough Tourism Economic Activity Monitor and was developed in the late 1980s by David James who at the time was Tourism Officer for the resort town of Scarborough in North Yorkshire. It has been refined over the last three decades and is used by many local authorities and other public sector organisations around the UK. According to its promoters, STEAM is not designed to provide a precise and accurate measurement of tourism in a local area, but rather to provide an indicative base for monitoring trends. The confidence level of the model is calculated to be within the ranges of plus or minus 10% in respect of the yearly outputs and plus or minus 5% in respect of trends.

² SFR – Staying with Friends and Relatives (sometimes referred to as VFR – Visiting Friends and Relatives. Staying implies an overnight trip to the home of the friend or relative)

Tourism Solutions (UK) Ltd, 2015) estimates that some 27 million leisure day trips were made to Greater Lincolnshire in 2014 generating a gross economic benefit of around £970 million, or some £35.90 per head per trip (Figure 7).

Figure 7: Volume and value of day visits to Greater Lincolnshire, 2014

	Trips	Gross economic benefit	Average economic impact per trip
Trips 2014	27,026,000	£970,447,000	£35.90

Source: Global Tourism Solutions (UK) Ltd (2015)

Other research on day visitor activity in the UK reported in the 2014 Great Britain Day Visits Survey (hereafter referred to as the GBDVS 2014) prepared for VisitEngland and partners by TNS (2015) provides a slightly higher estimate of the volume of day visitor activity across the area (Figure 8) but a lower estimate of the total economic impact. This lower estimate is because unlike the STEAM data, the GBDVS report does not include estimates of the indirect and induced economic impacts of visitor spending – it only considers the direct spending.

Of value to this research is the fact that the GBDVS report breaks down the findings by local authority area (though the source document indicates that the data for West Lindsey and North Kesteven is based on a small sample for each district and may therefore be an underestimate of the true situation.

Figure 8: Day trips across Greater Lincolnshire, 2012-2014 three-year average

Local authority	Day visits (n)	%	Spend	Ave. spend/ head
Boston BC	1,880,000	7%	£35,570,000	£18.92
City of Lincoln	4,370,000	15%	£242,640,000	£55.52
East Lindsey	7,650,000	27%	£236,610,000	£30.93
N E Lincs	3,620,000	13%	£102,910,000	£28.43
N Kesteven	1,590,000	6%	£15,820,000	£9.95
N Lincs	2,260,000	8%	£43,840,000	£19.40
S Holland	1,330,000	5%	£42,590,000	£32.02
S Kesteven	3,990,000	14%	£111,260,000	£27.88
W Lindsey	1,780,000	6%	£12,810,000	£7.20
Total Greater Lincolnshire	28,470,000	100%	£ 844,050,000	£29.65

Source: TNS (2015)

For the purposes of this research, therefore, the main conclusion to draw from the two estimates of day visitor activity across Greater Lincolnshire is that there are between 27 and 28.5 million day trips with an average spend per head, per trip of between £30.00 and £35.00. And in terms of the relative economic contribution of day visitors to the regional economy compared to tourists, there is approximately a 50:50 split – in other words, in terms of overall contribution day visitors are almost as important a contributor to local economic activity as are tourists. Thus it is essential that day visitors are considered in the recommendations for action that conclude this report, given that the overall objective is to stimulate economic development by encouraging greater participation in nature tourism in its broadest sense.

3.4 What do people DO in Greater Lincolnshire?

3.4.1 Survey findings relating to all or part of the study area

In order to provide an estimate of the current volume and value of nature tourism in the study area it is necessary to derive figures for the total volume of current activity (tourist and day visitor) that is associated with enjoyment of, and engagement with, the natural environment and wildlife. We have not been able to identify any specific surveys of trip-making habits across the whole of the study area and thus are obliged to refer to alternative survey findings

to provide approximations of the patterns in Greater Lincolnshire.

In terms of surveys undertaken at specific points across the area and that have been identified by this report's authors, or made available to us by the GLNP, there are a number of useful points arising:

- Overseas tourism to the former Government Office Region East Midlands (an area that includes Lincolnshire as well as several counties to the west, but which excludes North and North East Lincolnshire) is far more seasonal than across the UK as a whole. International tourists to the area tend to be older, with the Irish Republic, France and Germany the most important source of international visitors. Some 34% of international tourists to the East Midlands walk in the countryside, 20% visit villages and 14% visit the coast. 32% enjoy walking in the countryside whilst 4% will take a walk on the coast (VisitBritain, 2013)
- The most important leisure activities when visiting the coastline between Sandilands and Chapel St Leonards are going for a walk, watching wildlife, visiting reserves, bird watching, sitting on the beach, exploring coastal heritage sites, walking the dog and picnicking (Wild Planet Ltd, 2010)
- A survey undertaken to inform planning for the Coastal Country Park found that just under 50% of visitors in May to coastal car parks between Sandilands and Chapel St Leonards are local residents, with the remaining 52% split thus: 59% day visitors and 41% staying locally on holiday (Mouchel Ltd, 2012). Of all visits to the coastal car parks, more than 60% were by people going there to walk the dog and one-third of visitors came daily
- Visitors to the coast most value clean, quiet, 'wild' beaches with wildlife (PACEC, 2010)
- Locally-sourced food, including foods and recipes based on traditional crops and farming practices, is important to visitors to Lincolnshire now and will continue to grow in importance in years to come (Live Tourism, 2015). This suggestion is supported by work carried out elsewhere in the UK - see for example the Countryside Agency's 'Eat the View' project and also academic research carried out by Everett & Aitchison (2008 and Sims (2009). Gastronomic tourism based on regional delicacies and locally-sourced ingredients is indeed an increasing and high value niche tourism market across Europe - see for example Bertella (2011) and Tresidder (2015)

3.4.2 Activities undertaken by UK residents on day trips from home

Turning to day visitor behaviour, the previously mentioned GBDVS 2014 does not break down activity patterns below the home nation level. Figure 9 summarises participation levels for England in key activities that fit in with Newsome's (2005) overall definition of nature-based tourism (see page 6).

The GBDVS 2014 found that nearly 19% of all leisure day trips were for purposes that fall loosely within the definition used within this study of nature tourism, namely walking in the countryside or on the coast; engaging with wildlife or visiting natural heritage attractions (Figure 9 overleaf). The most popular activities are going for a walk in the countryside, visiting the beach and then visiting country parks.

More deliberate engagement with wildlife and natural heritage is restricted to around 3% of all visits, with viewing wildlife and birdwatching being slightly more popular it seems than visiting specific wildlife attractions and nature reserves (NB visiting zoos and safari parks was a separate category not included here). This supports the contention made later in this report that it is important not just to focus the promotion of wildlife/ nature tourism on 'point' resources like nature reserves, but also to celebrate the wider natural environment as a location for enjoying wildlife, flora and fauna.

Figure 9: Relevant outdoor activities taken on leisure day trips in England, 2014

Activity	Trips (m)	% of all trips
Short walk or ramble (2 miles or less)	81	6.0%
Go for a long walk	65	4.8%
Visit the beach	39	2.9%
Visit a country park	26	1.9%
Watch wildlife/ birdwatching	23	1.7%
Visit a wildlife attraction or nature reserve	18	1.3%
Total outdoor pursuits linked to nature tourism	252	18.7%

Source: TNS (2015)

To summarise, therefore, engagement with the natural environment in countryside settings occurs on just under 19% of all day visits, with more purposive wildlife viewing happening on some 3% of day trips. In calculating the impact of nature tourism in Greater Lincolnshire we shall apply these ratios to the day visitor data – 3% for wildlife viewing and 15.7% for general engagement with the countryside and coast (i.e. other aspects of nature tourism).

3.4.3 Activities undertaken by tourists staying in a destination

There are no up-to-date national figures on what domestic (UK) tourists do whilst on holiday in the countryside but research published in 2013 suggests that around 14.8% of all domestic countryside holidays in England include either a long walk, a short countryside walk or a trip to a Country Park (BRDC, 2013). It is thus not unreasonable to suggest that a similar figure of 14.8% of all holiday trips to Greater Lincolnshire might include some purposive engagement with the natural environment in a form that aligns with our earlier definitions of nature tourism.

We also propose using a figure of 3% of tourist trips as being the proportion linked directly to active enjoyment of the area's wildlife. This is based on the GBDVS 2014 data for day visits, and means that around 11.8% of holiday trips to Greater Lincolnshire are believed to include at least one instance of purposive engagement with the countryside (14.8 - 3.0).

3.4.4 Estimating the volume of engagement with nature by tourists and day visitors

Applying the ratios presented in Sections 3.4.2 and 3.4.3 to the overall data on the volume of tourism and day visitor activity (4.332 million staying visitors and just over 27 million day visits) gives an estimate of around 5.7 million trips during which people engage with the area's natural heritage and of this, more than 900,000 trips on which people viewed wildlife during their visit (Figure 10).

Figure 10: Estimate of volume of nature and wildlife tourism across Greater Lincolnshire

	Number in Greater Lincolnshire	% engaging with natural heritage	Estimated number engaging with natural heritage	% involved in wildlife viewing	Estimated number engaging with wildlife
Day visitors	27,026,000	18.7%	5,053,862	3%	810,780
Staying visitors	4,332,000	14.8%	641,536	3%	99,240
Total	31,358,000		5,694,998		910,020

Source: Report authors

Where the people making these 5.7 million nature tourism trips sit along the ICTHR continuum presented in Figure 5 is of course impossible to say for sure, other than the 910,000 or so trips that are made by those with a dedicated interest in wildlife. The remaining 4.785 million trips or so will be split between the middle two groups on that continuum.

It would also be useful to know the proportion and number of tourists for whom engaging with the natural environment or with wildlife was the primary purpose of their visit to Greater Lincolnshire. At present there is no data available on this topic with reference to the study area – research undertaken in Yorkshire a few years ago found that only 0.1% of tourists going to that county (though 0.6% going to East Yorkshire) had wildlife viewing as their primary motivation (ICRT, 2010). One of our recommendations for further action is for more primary data gathering to be carried out so that the GLNP can gain access to such calibration statistics (see Section 6.7 of this report).

One way to begin to calibrate this information would be to collate data on visitor numbers at all nature reserves and specific wildlife viewing sites across the area but as far as we understand, such data does not exist in a comprehensive form at present. We recommend that a digest of such statistics, including annual trends, is prepared for all of the main nature interest sites across Greater Lincolnshire in order to provide baseline data from which to monitor the impacts of any investments in product and service development made as a result of this report and other initiatives.

3.5 Seasonality

Figure 11 below assembles data from three sources to demonstrate how Greater Lincolnshire’s tourism sector experiences far more highs and lows over the course of a year than the UK as a whole. The reason for presenting this information is to confirm the importance of developing nature tourism as a core element of the region’s tourism product offer, since many of the core elements of nature tourism occur outside the traditional main summer season (Newsome, et al., 2005), thus providing opportunities to combat problems of seasonality faced by tourism businesses.

Figure 11: Seasonality of day trips & room occupancy

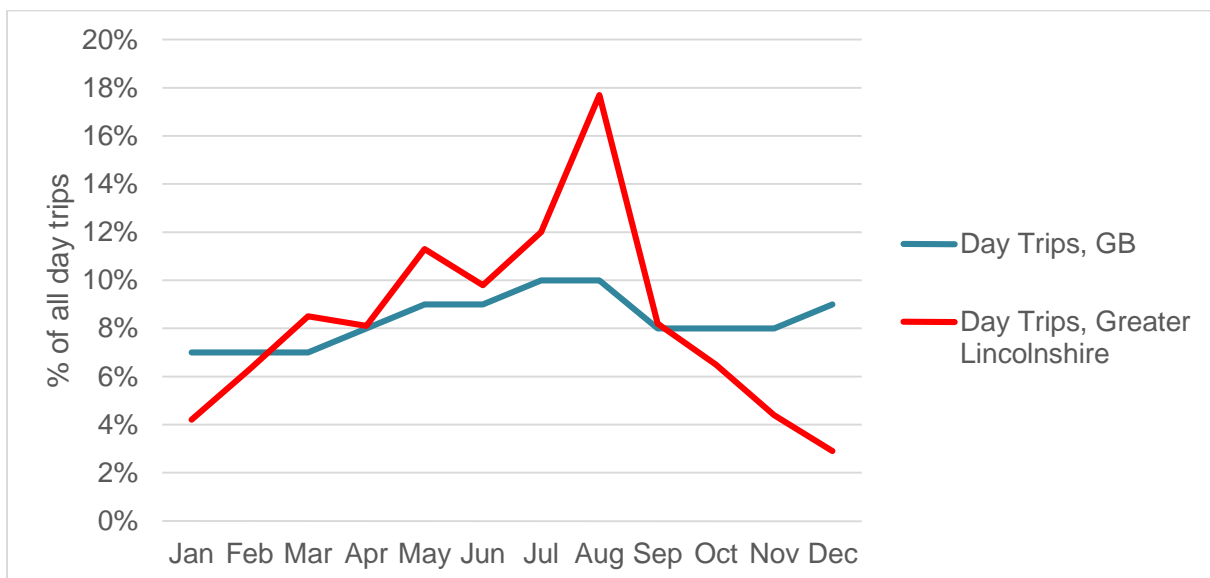
	Day visitor trips 2014, Greater Lincolnshire		Day visits in 2013 (GB)		Room occupancy rates, England, 2014 (serviced accommodation)
	('000)	%	(million)	%	%
Jan	1,138	4.2%	113	7%	52%
Feb	1,705	6.3%	110	7%	61%
Mar	2,300	8.5%	112	7%	64%
Apr	2,189	8.1%	131	8%	68%
May	3,054	11.3%	136	9%	72%
Jun	2,649	9.8%	149	9%	76%
Jul	3,243	12.0%	157	10%	78%
Aug	4,784	17.7%	162	10%	78%
Sep	2,216	8.2%	134	8%	78%
Oct	1,757	6.5%	128	8%	74%
Nov	1,189	4.4%	120	8%	68%
Dec	784	2.9%	136	9%	61%
	Total: 27.026	100%	Total: 1,588	100%	Average: 69%

Sources: Global Tourism Solutions (UK) Ltd (2015); TNS (2014); (The Research Solution, 2015)

Figure 12 compares the monthly share of all visitor day trips across Greater Lincolnshire in 2014 with the monthly share of all GB Day visits for 2014 and demonstrates more clearly that the day visitor activity in Lincolnshire is far more focussed on the summer months than is the case for GB as a whole, reflecting the influx of visitors to the coastal areas of the region). Again, this reinforces the need for investment in nature tourism products and services that can spread the load more evenly across the year, to strengthen local economic growth.

At the time of writing no data was available for Greater Lincolnshire to permit a comparison of the study area's room occupancy rates with national data. Should such data be collected in the future, then a comparison of regional against national occupancy rates would help to establish where products targeting overnight tourism should be directed so that local accommodation providers are able to benefit more fully from nature tourism opportunities in ways that combat low occupancy rates.

Figure 12: Percentage breakdown of day trips by month – GB (2013) and Greater Lincolnshire (2014)



Sources: Global Tourism Solutions (UK) Ltd (2015); TNS (2014). Additional analysis by report authors

3.6 Summary

On the basis of the information presented above, it is clear that conventional academic thinking on segmenting nature tourism is as valid in Greater Lincolnshire as it is in other locations – there is a small, specialist market for specific species or for wildlife in general, and a broader market for whom the natural environment is a backdrop to their leisure activities and who in volume terms form a much larger market.

In terms of estimating the current baseline level of engagement with the natural heritage of the area, we have identified a figure of around 5.69 million holiday trips and day visits across the Greater Lincolnshire area that include some element of engagement with nature. Of these trips, around 90% are made by day visitors, most of whom live within the study area and thus although there will be considerable spending associated with these day visits, that will help to support local businesses and their associated services it is not additional input into the regional economy (though it is not leaking out of the regional economy either). In terms of wildlife viewing in particular, we estimate that there are around 910,000 trips a year across Greater Lincolnshire where this is part of the activity undertaken during the visit.

In short, out of all the day visits or holiday trips in Greater Lincolnshire that can be classified as containing an element of nature tourism, around 16% will involve viewing wildlife as the primary activity, – the vast majority comprise a more general engagement with the natural heritage of the region.

Also of note is the finding from the STEAM data (see Figures 6 and 7) that day visitors outnumber tourists by a ratio of more than 6:1. Thus developing strategies to convert day visitors into overnight stays should be a key objective as it will immediately increase spending

on accommodation, food and drink. Assuming strong local supply chains this also delivers benefit to the area's agricultural and food producing community.

In terms of staying tourists, the largest proportion (around 40%) stay in non-serviced accommodation and a further one-third stay with family and friends, leaving just over 25% staying in serviced accommodation. Thus there are several routes into these markets that need to be explored by GLNP partners, including developing relationships with owners and staff working in the accommodation sector across Greater Lincolnshire but also increasing engagement with local residents – not only do they form the largest potential market segment by virtue of the day trip market but they are also a route into the very important SFR market (around 1.4 million trips/ year).

Finally, it is important to note that tourism and day visitor activity across the study area is very seasonal (despite attractions in the shoulder months like the seals at Donna Nook and the Wolds Walking Festival in May), and so any strategy for overcoming some of the aspects of seasonality should be welcomed.

The challenge, therefore, is to develop investment opportunities that will increase the overall economic benefit associated with nature-based tourism in Greater Lincolnshire by encouraging those with no interest in the area's natural heritage at present to start to engage with it, and by encouraging those with some interest to convert to more active engagement that includes additional spending – whether this is on entrance fees & guiding services; accommodation or associated food, drink and travel costs or other shopping.

The following section of the report presents our estimate of the current value of nature tourism to the region's economy in order to provide additional guidance on where future action might be required or appropriate.

4 Estimating the Economic Impact of Nature Tourism in Greater Lincolnshire

4.1 Introduction

The following assessment of the economic impact of nature tourism in Greater Lincolnshire is based on a review of existing secondary data published by a range of sources and not on primary research carried out explicitly for this purpose. As such, the figures provided should be taken as a guide only and not a definitive statement of the situation at present. Nonetheless, all data sources used are robust in their own right and thus we are comfortable presenting the findings below for consideration by the GLNP and other partners. This section contains:

- A review of the volume and value of tourism (including leisure day visits) across the area based largely on the STEAM data for 2014 published by Lincolnshire County Council and the GBDVS 2014 report
- A reminder of the earlier assessment of the amount of tourism activity and leisure day trips that are directly or indirectly associated with nature tourism – these estimates have been derived by applying participation data in different activities contained in a number of surveys of participation by tourists and leisure day trippers to the volume data presented above
- Projections on the likely level of economic benefit currently derived from nature tourism across Greater Lincolnshire using a range of economic baseline data gleaned from a range of authoritative sources

The study area contains the seven local authority areas that together constitute the County of Lincolnshire (Boston; City of Lincoln; East Lindsey; West Lindsey; North Kesteven; South Kesteven; South Holland) plus the two unitary authority areas of North Lincolnshire and North East Lincolnshire.

Some of the information contained within this section has previously been presented in Section 3 where we calculated the overall volume of nature tourism currently happening in the study area. We have tried to avoid duplication except where its inclusion is vital to a clear understanding of the calculations and our wider thought process.

4.2 Volume and value of tourism across Greater Lincolnshire

The following assessment of the volume and value of tourism draws on the STEAM data for 2014 recently made available by Lincolnshire County Council. It is understood that the data includes the two Unitary Authorities of North Lincolnshire and North East Lincolnshire as well as Lincolnshire County Council's area and thus covers all of the study area.

Figure 13 presents the 2014 data for tourist trips across Greater Lincolnshire and confirms the average economic impact per trip to be just over £225, and the average impact per day close to £59.

Figure 13: Volume and value of overnight tourism in Greater Lincolnshire, 2014

Trips	Days	Average length of stay	Total economic impact	Average impact/ trip	Average impact/ day
4,332,000	16,611,000	3.8	£ 976,817,000	£ 225.49	£ 58.81

Source: (Global Tourism Solutions (UK) Ltd, 2015) Additional analysis by report authors

The economic impact calculation provided by Global Tourism Solutions in the STEAM reports includes both direct expenditure but also indirect and induced spending, and thus provides an overall indication of the economic significance of tourism across the region.

What stands out from the above data is the economic significance of the non-serviced accommodation sector which accounts for just under 40% of all trips but nearly two-thirds of

the total economic impact. Thus catering for the needs of this market into the future is essential if this economic benefit is to be retained and even grown.

So far this analysis has focused on overnight tourists but in terms of overall numbers these are dwarfed by leisure day visitors. As indicated in Section 3.3 of this report, there are two sources of information providing slightly different findings on the volume and value of day trips to the area and below we briefly introduce each one (Figure 14).

Figure 14: Summary of day trip estimates for Greater Lincolnshire, 2014

Source	STEAM data for Greater Lincolnshire 2014	GBDVS 2014
Estimated volume of day visits	27,026,000	28,470,000
Overall economic impact	£ 970,447,000	£844,050,000
Average per head	£35.91	£29.65

Sources: (Global Tourism Solutions (UK) Ltd, 2015) and (TNS, 2015) Additional analysis by report authors

In order to retain an element of consistency within the calculations we will use the STEAM data for day trips – the smaller figure of 27 million trips – on the grounds that it was collected and analysed using the same methodology as the accommodation survey.

However, the GBDVS 2014 report (see Figure 8) does provide us with useful information on the distribution of day visitor activity across the area and confirms the dominance of East Lindsey (which includes Skegness within its boundaries), City of Lincoln, South Kesteven and North East Lincolnshire. This information is reflected in some of the investment proposals put forward later in this report.

Combining the STEAM data for day visitors with that for staying visitors gives a total of around 43.6 million visitor days and £1.95 billion economic impact for all tourism and day visitor activity across Greater Lincolnshire (Figure 15). This then provides the baseline information on which the value of nature tourism in Greater Lincolnshire can be calculated.

Whilst day visitors are by far the majority in terms of the overall number of visitors to the area, and are also responsible for the greater proportion of visitor days (around 62% of all days spent in Greater Lincolnshire), staying visitors have almost exactly the same impact on the regional economy. Thus it would appear to be logical for any endeavours to increase the profile of nature tourism in the area to address both markets.

Figure 15: Summary of STEAM data for Greater Lincolnshire

	Staying Visitors	Day visitors	Total
Total visitors	4,332,000	27,026,000	31,358,000
% of total visitors	14%	86%	100%
Total visitor days	16,611,000	27,026,000	43,637,000
% of visitor days	38%	62%	100%
Total economic impact	£976,817,000	£970,447,000	£1,947,264,000
% of total economic impact?	50%	50%	100%

Sources: (Global Tourism Solutions (UK) Ltd, 2015) and (TNS, 2015) Additional analysis by report authors

4.3 Calculating the current value of nature tourism

In order to provide an estimate of the current value of nature tourism in the study area it is necessary to derive figures for the total volume of current activity (tourist and day visitor) that is associated with enjoyment of, and engagement with, the natural environment and wildlife.

As indicated in Section 3, we have not been able to identify any specific surveys of trip-making

habits across the whole of the study area and thus have been obliged to refer to alternative survey findings to provide approximations of the patterns in Greater Lincolnshire.

Using relevant data sources, we have estimated that around 5.69 million visitors to Greater Lincolnshire engage with the natural heritage in a purposive way during their time in the area, whether this is on a day trip or a longer, overnight stay (Figure 16). Of these, around 16% are actively engaged in viewing wildlife whilst the remainder are enjoying the region's many varied landscapes and habitats.

Figure 16: Estimate of volume of nature and wildlife tourism across Greater Lincolnshire

	Number in Greater Lincolnshire	% engaging with natural heritage	Estimated number engaging with natural heritage	% involved in wildlife viewing	Estimated number engaging with wildlife
Day visitors	27,026,000	18.7%	5,053,862	3%	810,780
Staying visitors	4,332,000	14.8%	641,536	3%	99,240
Total	31,358,000		5,694,998		910,020

Source: Report authors

Translating the above into an estimate of the total economic impact is theoretically relatively simple as one multiplies the number of trips linked to engagement with wildlife and nature by the average impact per trip (Figure 17).

Using the STEAM 2014 data and applying it to the above calculations on the volume of activity generates a figure of around **£325 million gross economic impact of nature tourism** (and day visits linked to enjoying nature) in Greater Lincolnshire. Of this, around **£51.5 million** would appear to be linked to trips made where wildlife viewing is a purpose of the trip. The 2014 STEAM report uses an employment multiplier of approximately £67,000 per FTE for combined direct, indirect and induced employment linked to tourism and day visitor spending in the area, suggesting that nature and wildlife tourism across Greater Lincolnshire currently supports around **4,850 FTE jobs** across the area.

Figure 17: Estimated total economic impact of nature tourism in Greater Lincolnshire

	Number of nature tourist trips in Greater Lincolnshire	Total economic impact per trip	Impact of ALL nature tourism visitors	Number of trips with people viewing wildlife in Greater Lincolnshire	Impact of only wildlife viewing
Day visitors	5,053,862	£35.91	£181,484,184	810,780	£29,115,110
Staying visitors	641,136	£225.20	£144,383,827	99,240	£22,348,848
Total	5,660,342		£325,868,012	910,020	£51,463,958

Source: Report authors

However, this figure of around £325 million is likely to be an overestimate of the 'true' impact of nature tourism to the economy of Greater Lincolnshire for a number of reasons:

- The estimates of the total number of tourists and day visitors engaging in some form of nature tourism activity do not differentiate between those for whom it was a primary purpose and those for whom it was a secondary motivation for the trip – thus it likely to overplay the real significance of the current nature tourism product (in whatever form it

- takes) in terms of its appeal to visitors
- The average economic impact per trip data used is very likely to overestimate considerably the real situation on most leisure day trips, particularly for the kinds of activities undertaken on such trips and recorded in the GBDVS 2014 reports (see Figure 9). Many of these day trips may be taken from home and will involve little if any spending. Thus using the estimated impact for all day visits is likely to skew the results by a considerable margin
 - Similarly, the impact for tourists is likely to be an overestimate since it assumes that the total impact of the stay is associated with nature tourism, when in reality this may only have been one of many different activities undertaken during the stay in Greater Lincolnshire. Again, this is likely to have delivered a far higher figure than is the case in reality
 - According to the GBDVS 2014 report, the average round trip on a leisure day trip in Great Britain is 44 miles thus most of the day trips made within Greater Lincolnshire will be by local residents. Thus even though they may be spending money on a trip, it is merely being recycled within the regional economy – it is not additional spending

A more reliable figure for the value of nature tourism to Greater Lincolnshire requires access to detailed survey data on day visitor and tourist motivations and trip making patterns – information that is not currently available in a form that could be used to advise this research project. We strongly recommend that such data is gathered in the coming years to allow a more refined projection of the value of nature tourism to Greater Lincolnshire to be calculated.

In the meantime, in terms of public consumption of this data, we would recommend emphasising the figure of around £51 million as the gross economic value of wildlife tourism to the study area, and the much larger figure of £325 million as the potential value of all countryside-based recreation and leisure across Greater Lincolnshire.

4.4 Concluding Remarks

Based on our initial desk-based analysis, we estimate the current value of nature based tourism and leisure activity to Greater Lincolnshire could be as much as £325 million, of which £51 million is associated with holidays and day trips where engaging with wildlife is the primary purpose. Day visitors are by far the largest single market in volume terms, but the staying (tourist) market is almost its equal in terms of overall economic impact.

Thus efforts to increase the value of nature tourism across Greater Lincolnshire need to consider not only these two broad segments, but also the niches within each group. For the day visitor market, attracting residents of surrounding counties into Greater Lincolnshire (e.g. East Yorkshire & Humberside; South Yorkshire; Nottinghamshire, Cambridgeshire, Norfolk and Rutland) will increase the additionality element of day visitor spending. At the same time, efforts should also be made to retain the local resident market to reduce leakages out of the economy. Converting existing day visitors into overnight guests will lead to an increase in average spend per head, no matter what type of accommodation is used. For the tourist market, attempts must be made to target users of all accommodation types (serviced, non-serviced or SFR) as they are all important components of the overall visitor mix. Tactics for tackling these sectors are put forward in the recommendations that conclude this report.

In the following section, we briefly review the main findings of the questionnaire surveys of LWT members and GLNP stakeholders to provide guidance on the key issues they perceive relate to the development of nature tourism in Greater Lincolnshire.

5 Identifying challenges and opportunities for developing nature tourism in Greater Lincolnshire

5.1 Introduction

In order to understand fully the challenges facing the GLNP and other stakeholders in developing nature tourism across the area, and to help identify opportunities for investment in product and service development, the consultancy team undertook a programme of primary research during July and August 2015 including:

- Site visits to key locations across Greater Lincolnshire (Appendix 1 contains basic observations by the team)
- Online questionnaire survey of 55 GLNP stakeholders
- Online questionnaire completed by 26 LWT members
- Interviews with 11 key stakeholders (see Appendix 2), informed in part by the findings of the site visits and online surveys.

A summary of the findings from the key informant interviews and the two questionnaire surveys are presented in Appendices 3 and 4 and are summarised below. It should be noted that whilst the response rate and hence analytical sample size of the GLNP stakeholder survey is high and thus the findings should be comprehensive and robust, the small sample responding to the LWT survey means that those findings are treated as indicative only.

5.2 Summary of research findings

5.2.1 Current strengths

Interviews with key informants, responses from other stakeholders and our observations whilst in the field revealed a number of different themes regarding the development of nature tourism in Lincolnshire. In general, there was agreement that there are already considerable strengths on which to build, including:

- Existing locations that can act as flagships for further development work (e.g. Whisby Nature Park, Gibraltar Point, Far Ings)
- Opportunities for developing new 'point' locations on reclaimed land as has already been done at Whisby – the development proposals at the former airfield Woodhall Spa offer one such example. The whole process of habitat restoration and creation provide the opportunity to communicate to different audiences a broader story about planning for nature
- The presence of a number of 'clusters' of sites that create additional critical mass in terms of marketing the destination- one example being the Clay Pits area along the south bank of the Humber which includes Water's Edge in Barton, the Tileworks, Far Ings, Winteringham and Alkborough Flats
- An increasing interest in catering for nature tourists within the region's tourist accommodation sector, linked to the development of higher quality (and thus higher yielding) visitor accommodation
- A commitment by a broad range of agencies to not only develop their own projects, but to implement these within a broader framework of investment proposals as anticipated by the GLNP. Examples include the proposed Landscape Partnership project in North Lincolnshire covering the Isle of Axholme and Hatfield Chase
- In the south of the county, proposals to develop more recreation and tourism based around the network of waterways

5.2.2 Challenges

Notwithstanding the above strengths, there is also a recognition that there remain some considerable challenges facing the GLNP and others in progressing any initiative designed to grow nature tourism across Greater Lincolnshire. These include:

- A lack of co-ordination across the whole of Greater Lincolnshire in terms of destination marketing in general, and for niche tourism such as wildlife or nature tourism in particular.
- Perception by the potential market that Lincolnshire is either flat fenland or beach resorts catering for the mass market
- At times, a lack of co-ordination between relevant organisations
- Lack of infrastructure for tourism, particularly good quality accommodation and eating places compared to competitor destinations such as North Norfolk
- A lack of enthusiasm for tourism by residents in some parts of the area, partly because the agricultural sector is based around relatively intensive land-use, and partly because of a perception of potential negative impacts
- Absence of long-term funding streams to provide revenue support for projects e.g. Coastal Grazing Marshes, Fens Waterway Link, Coversands project, Lincolnshire Limewoods.

5.2.3 Opportunities

In response to questions about what opportunities exist to develop nature tourism across Greater Lincolnshire, respondents identified a broad range of ideas that could be categorised into the following broad areas:

- Funding
- Capacity building and co-ordination
- Marketing initiatives
- Product development opportunities (including both habitat creation and restoration, as well as new visitor centres and access infrastructure)

The consultations have confirmed that there is a broad range of product available for nature tourists of most interests and that some of these are already destined for further development. As suggested at the end of Section 2 of this report, there is the beginning of a clustering of sites that will provide a critical mass of destinations in certain parts of the Greater Lincolnshire region.

Key barriers to developing the product are the geography of the area; accessing funding; problems with marketing and promotional activities that are not sufficiently well-resourced to overcome basic perceptions of the area and a wider issue with the overall tourism infrastructure that doesn't service some important markets.

A summary SWOT analysis is presented overleaf to bring together the outcomes of the questionnaire surveys and the consultations, and to form a basis for the identification of development opportunities.

Figure 18: Summary SWOT analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> • Several key nodal points already offering good quality nature tourism product (e.g. Donna Nook; Gibraltar Point; Whisby Nature Park, Far Ings, Freiston Shore) • LWT, RSPB, and Lincolnshire County Council already active promoting the area’s rich and varied natural heritage to a range of audiences • Broad alliance of interests in the GLNP • Range of subtle landscapes can be found across Greater Lincolnshire • Excellent new places to see wildlife have been created at Alkborough Flats, Freiston Shore, Willow Tree Fen and Crowle Moor through managed realignment/retreat schemes and other forms of restoration (e.g. Crowle Moor is restoration of peatland). Lessons from these projects are now being applied at Donna Nook and Woodhall Spa Airfield, creating yet more nature tourism destinations. • Three major coastal resorts (Cleethorpes, Mablethorpe and Skegness) in the area with significant numbers of bedspaces • The City of Lincoln is also an established tourism destination with a broad range of accommodation types • Broad range of accommodation stock available across the whole of Greater Lincolnshire (though not in all areas – see weaknesses) • Many nature attractions already highly accessible by road • Interesting human and cultural interest stories which can be linked to nature tourism (e.g. Isle of Axholme land-management system, village changes due to coastal accretion / erosion) • Nascent clusters of range of attractions (nature-based and other) along east coast and along South Humber Bank (NB this one is partly due to South Humber Bank Wildlife and People Project³) 	<ul style="list-style-type: none"> • Peripheral location relative to large areas of population who could form an audience for the area’s natural heritage attractions • Poor provision of good-quality accommodation and catering services near nature reserves • Shortage of mid-range, branded accommodation e.g. Premier Inn, Holiday Inn Express outside the main centres of accommodation • Poor public transport access to and around the Eastern, Central and Southern parts of Greater Lincolnshire in particular • No flagship location offering a ‘wow’ factor in landscape terms (though some may argue that the Humber Estuary and the Wash are spectacular) • Poor promotion of local food specialities in some hospitality businesses catering for visitors • Lack of take-up of enterprise opportunities by local people • Lack of collaborative marketing and cross-selling by organisations involved in managing nature reserves and collaboration with accommodation providers • Limited iconic species (‘charismatic megafauna’) to engage generalist interest apart from the best land-based seal-watching site in England • Much of the land is high grade agricultural thus limited opportunities for developing large areas of nature conservation interest in many parts of the region • Public perception that much of Lincolnshire is flat fenland • Perceptions that bird-watching is less good than along the North Norfolk Coast •

³ <http://www.jbaconsulting.com/project/south-humber-bank-wildlife-people-project-shwap>

Opportunities	Threats
<ul style="list-style-type: none"> • Explore potential for Greater Lincolnshire-wide and more local marketing initiatives promoting particular aspects of the region's natural heritage to either generalist or specialist audiences, depending on the theme • In conceptual terms, exploit the lack of the 'extraordinary' to focus more on making the 'ordinary' special • Use existing key nodal points as honeypots for development, particularly those close to major population and holiday centres. These will have a focus on catering for the casual visitor • Develop more clusters of provision across the area to build a critical mass of nature tourism attractions on a more local basis – these should cater for both casual and specialist visitors. These clusters can combine nature tourism sites with other types of attraction (see below) – the intention is to ensure visitors are aware that they can spend more than just a few hours in the same part of the destination • Work with other types of tourist attraction, particularly those with environmental appeal (e.g. historic properties with designed landscapes and gardens) to build visitor interest in the wide range of attractions and experiences available across Greater Lincolnshire • Use a variety of seasonal events (e.g. seal pupping; migratory birds arriving or leaving; certain trees coming into leaf or plants flowering) as the basis for festivals or special events targeting niche markets and involving local people much more in their local heritage (work closely with organisations like Common Ground⁴ and the BTO's Bird Track⁵ initiative) • Around 1/3 of Lincolnshire is below sea level and thus at risk of inundation as climate change increases the likelihood of major 	<ul style="list-style-type: none"> • Continued austerity drive by central government will inevitably reduce public funding for 'non-essential' services thus much of the funding for any initiative will need to be sourced from other investment sources including partner budgets; grant aid from organisations like HLF and from sponsorship • Climate change is predicted to bring hotter, drier summers and warmer, wetter winters to the East Midlands (including Greater Lincolnshire) with resulting impacts on the natural environment. Though this is a longer term issue, forward planning in terms of shifting agricultural patterns may affect landscapes sooner rather than later • Opposition or weak support from local residents to increased volume of tourism. If the host communities feel inconvenienced by the promise of, or impacts of, investment initiatives designed to develop tourism in an area, there may be opposition which creates problems for the promoting agencies – see for instance community opposition to the YWT proposals at Spurn Point⁶

⁴ <http://commonground.org.uk/>

⁵ <http://www.bto.org/volunteer-surveys/birdtrack/about>

⁶ <http://www.yorkshirepost.co.uk/news/main-topics/general-news/fingers-are-pointed-in-row-over-visitor-base-at-spurn-1-7365426>

<p>flood events. Measures to manage this again may create an opportunity for nature tourism, e.g. the current managed realignment schemes have created excellent places to see wildlife. The difficulty is getting visitors to spend money because there are limited facilities. Use Natural England's National Character Areas as a framework around which to build site and sub-regional specific recommendations for action</p>	
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6 Recommendations for Action

6.1 Introduction

As indicated in the opening section of this report, the aspiration of the GLNP is to add value to the existing tourism industry across Greater Lincolnshire by raising awareness of, and engagement with, the region's natural heritage resources. The aim is not necessarily to increase significantly the number of tourists coming to Greater Lincolnshire but to create opportunities for people to stay a little longer, explore parts of the destination that they are currently not visiting and to spend more money within local economies. From the GLNP perspective, this is about integrating more fully nature into the rest of the tourism sector.

To achieve this there is a need to raise awareness of the wide variety of wildlife and nature viewing opportunities available across the destination at all times of the year and to identify actions that will target specific market segments (including tourists already staying locally; day visitors and host communities living in the area). Some initiatives may also attract new business to the destination – people who previously would not have thought of visiting Greater Lincolnshire – but delivering a major increase in the overall volume of tourist activity is not a primary objective here.

Strategies and actions for achieving this aspiration (adding value to the existing industry) can be grouped into a number of categories:

- Developing general marketing campaigns in partnership with relevant organisations to raise overall awareness of Lincolnshire's natural heritage and its opportunities for tourism
- Encouraging tourists already staying locally to extend their length of stay in the destination by helping them understand the range of products on offer
- Converting day visitors into overnight stays, particularly in the shoulder months when many tourism businesses remain open but would benefit from additional guests
- Increasing the range of products offered for which people – tourists or day visitors – may be prepared to pay
- Attracting niche markets for whom viewing wildlife and engaging with nature is the primary purpose of their visit, and who because of their previous experience understand how to 'behave' in the countryside and thus will not create land management problems
- Developing initiatives aimed at existing residents, so that they can engage more with the nature on their doorstep and act as ambassadors to friends and relatives who may come to stay with them from time to time

Below we present a suite of recommendations for consideration by the GLNP and its partners, starting with ideas for a range of marketing campaigns that could be adopted across the area in order to build general awareness of the destination's natural heritage.

As indicated by many consultees, a marketing campaign involving a number of key partners could, if sufficiently creative and well enough resourced, change perceptions amongst the public of the landscapes, flora and fauna of the region. Changes to the structure and resourcing of destination marketing and management in England in recent years has compromised the ability of the public sector to lead such initiatives, thus it is important to be selective in terms of messages, media and markets targeted. Suggestions for consideration by the GLNP and other stakeholders are presented below. Delivery will of course be dependent on funding availability.

Figure 19: Destination-wide marketing initiatives

Message	Media	Markets
<p>“Enjoying Lincolnshire’s natural heritage” Lots to see and do if you are interested in the natural world, particularly if you want to learn more about a hidden corner of England. Intention is to build on the broad introduction to the area on the Visit Lincolnshire website⁷ and provide more detailed information on what is available</p>	<ul style="list-style-type: none"> • Single website acting as a portal for web users to access information about the wealth of nature conservation, wildlife viewing and gentle countryside recreation opportunities across Greater Lincolnshire. This can be part-funded by private sector businesses catering for nature tourists (e.g. specialist accommodation providers; guide services; organisations mounting events linked to wildlife and nature tourism etc.) as well as supported by key organisations including the DMOs, LWT, RSPB, National Trust etc. 	<p>All types of nature tourist from casual through to specialist. This can also be a resource for local accommodation businesses so they can advise their guests</p>
<p>Lincolnshire – landscapes for all seasons” Images of springtime in the lime woods as they are coming into leaf; summer beachcombing on the coast or cycling through the Wolds; autumn watching seals at Donna Nook and migrating birds along the coast; brisk walks and big skies in the Fens for winter.</p> <p>Images should focus on families engaging with the natural heritage (if the word ‘seasons’ is omitted then one is left with ‘Landscapes for All’ which works equally well)</p>	<ul style="list-style-type: none"> • Poster campaigns on East Coast Mainline Stations as far north as Darlington and key stations on Midlands line from St Pancras to the East Midlands and South Yorkshire • Advertisements and editorial in magazines including The National Trust Magazine (circulation 2 million); Asda, Tesco, Morrison’s & Sainsbury’s Magazines (2.0; 1.9; 1.3 and 0.2 million circulations respectively). Link these adverts to stories about Lincolnshire’s food – perhaps resurrect the ‘Eat the View’ idea from Countryside Agency. This may help secure funding for the campaign from local food producers as well. • Social media campaigns supporting the above, running on a seasonal basis and using user-generated content (photos, tweets, blogs) to increase awareness. Best amateur photo of a seasonal landscape wins a 2-night break in <u>another</u> season to encourage them to return to take a photo in the same place! 	<p>Day visitors and short-break market living within 2 to 3 hours’ drive</p>

⁷ <http://www.visitlincolnshire.com/content/great-outdoors>

<p>“Lincolnshire - It’s the little things that matter” (or perhaps “Lincolnshire – amazing everyday”). Part of this initiative focusses on raising awareness of the hidden corners of the area and what makes them special – enclosed spaces in valleys such as Snipe Dales, Sow Dales and Keel Carr or the reed beds at Frampton Marsh.</p>	<ul style="list-style-type: none"> • Advertorial and editorial in niche publications with supporting social media campaigns • Active programme of awareness raising and familiarisation visits for accommodation providers so that they are aware of their local reserves, what is on offer and access issues 	<p>Specialist markets of walkers and ramblers; birders; naturalists; botanists. Local accommodation providers</p>
<p>“Lincolnshire – get the picture?” This is based around developing and offering holidays for people keen to spend time taking the perfect photograph or paint the perfect picture. This will require recruitment of a number of accommodation providers who have rooms or outbuildings that can be converted into studio space⁸.</p> <p>Links with the University of Lincoln will guarantee uptake from younger artists whilst links with U3A and similar organisations could generate interest from older artists.</p> <p>Separately, this could align with a touring exhibition of historic and contemporary pictures and photographs of Greater Lincolnshire curated by The Collection in Lincoln or another public sector gallery, visiting a number of venues around the region.</p>	<ul style="list-style-type: none"> • Advertorial and editorial in niche publications run in partnership with guest house and small hotel owners with an interest in accommodating these groups. • Annual competition run by LWT or another partner in the GLNP with winning images being used in a fund-raising calendar • Actively promote participation in the annual Big Draw⁹ event by promoting particular reserves, wildlife sites and viewpoints across Greater Lincolnshire that are suitable locations for amateurs wishing to share their love of fine art 	<p>Specialist markets of photographers and artists, both individuals but also clubs and societies looking for a short break.</p>

⁸ Cober Hill near Scarborough is an example of a medium size hotel (64 rooms) that supports themed visits by fine, applied and performing arts groups <http://www.coberhill.co.uk/themedbreaks.php>

⁹ <http://www.thebigdraw.org/>

6.2 Encouraging tourists already staying locally to extend their length of stay and to explore more widely

6.2.1 Crowle Moor Destination Development Project

Crowle Moor could provide an introduction to the peatland and heathlands of this part of Greater Lincolnshire (a larger area of similar habitat exists at Thorne and Hatfield Moors in South Yorkshire) and its wildlife interest including Red Deer and a number of attractive (in tourism terms) bird species including Owls and Nightjar (migratory species, arrives around April). Linking the reserve's natural heritage with the town's cultural heritage (including a part Saxon and Norman Parish Church and a Gothic Revival Market Hall) could be the subject of a local business community-led destination marketing project as the limited tourism infrastructure in and around Crowle makes it difficult to recommend any developments that would attract large numbers of visitors. Whilst the reserve is best visited between April and August for its wildlife interest, promoting the reserve as a great place to blow off cobwebs on a clear winter's day might increase the level of day visitor activity in the off-season. This might also increase revenue for local businesses. Investment in interpretation at the reserve about past investment in the reclamation and management of the wetlands would help to place the landscape in its historical context. This initiative would need to be implemented in partnership with Humberhead levels

6.2.2 Far Ings and Surrounding Area Marketing Initiative

One location where there is increasing provision for outdoor recreation further down the Humber Estuary is at Far Ings NNR. This important reserve has a visitor centre, is easily accessible from Hull and East Yorkshire, as well as from towns along the south side of the Humber, and the tourism product is augmented by Waters Edge Country Park and Visitor Centre and the nearby tileworks¹⁰. Established in the 1840s, the tileworks are still operational and present a link between the natural resources of the area and its industrial heritage. With the amenities of the small town of Barton nearby, and very good road access, the southern bridgehead area of the Humber Bridge could be developed as a gateway into Lincolnshire (politics surrounding use of the county name in its ceremonial rather than administrative sense notwithstanding). Additional signposting is certainly required – for instance, it is not signposted from the A15/ Humber Bridge. We recommend developing the existing 'South Humber Collection' destination marketing initiative with additional input from LWT, the Old Tileworks and businesses from Barton as an appropriate means of pursuing this initiative with one key objective, being increasing penetration into the transit market of holidaymakers and day trippers who use the Humber Bridge.

6.2.3 Familiarisation trips for accommodation staff around Brigg

The core of Brigg is a Conservation Area and a reasonably attractive destination from which to explore the surroundings. Familiarisation visits to local reserves for local hotel staff, guest house and B&B owners would help raise awareness of opportunities to enjoy the natural heritage of this part of Lincolnshire and for neighbouring NCAs. These '*fam trips*' could be piloted in Brigg and if successful, offered to accommodation providers in other smaller market towns around the region (see below).

6.2.4 Cleethorpes Discovery Centre – accommodation provider partnerships

The Discovery Centre in Cleethorpes is already being re-positioned as a hub from which the wildlife and natural heritage of the area can be explored¹¹ and it is important that this continues to be supported by GLNP partners and other relevant organisations. Cleethorpes attracts an

¹⁰ <http://www.theoldtileworks.com/>

¹¹ <http://www.grimsbytelegraph.co.uk/Wildlife-lovers-invited-help-Cleethorpes/story-20778029-detail/story.html>

older clientele (residential and holiday makers) who may be interested in evening talks about the area's wildlife - particularly the migratory birds who pass along the coast here and also the seals who pup at Donna Nook. This could be part of a broader outreach programme run by local LWT and RSPB local groups in partnership with the U3A and other similar organisations.

6.2.5 Holiday park partnerships on the coast

Where holiday home/ caravan parks are located next to or within walking distance of nature reserves and accessible SSSIs (such as at Toby's Hill, Saltfleet which is very close to Sunnydale Holiday Park) we recommend the development of family-based environmental educational programmes in partnership with the Park owners and operators as part of the "**Lincolnshire - It's the little things that matter**" initiative. Guests staying in these accommodations have already made the commitment to visit the area, thus it is more appropriate to encourage them to engage with, appreciate and understand a little more the natural heritage of the Lincolnshire coastline. Such initiatives could be developed using the same basic materials as used in the National Curriculum's KS1 and KS2 educational programmes for primary and junior school children, but presented in a slightly more 'fun' way to reflect their leisure focus. In all instances, such initiatives should be piloted with small groups to ensure that there is no damage to the habitats and wildlife at the study locations.

We recommend that a workshop session is held with events/ entertainment/ animation staff from holiday parks in Cleethorpes, Saltfleet, Mablethorpe, Chapel St Leonard, Ingoldmells and Skegness to see what wildlife and nature-related activities they already offer and what services or support they might welcome from LWT and its partners to increase their customers' engagement with the natural heritage of the area. A programme that reflects seasonal events could help encourage holidaymakers who own static vans on some of these parks to return for short breaks at times of the year when they traditionally stay away.

6.2.6 Familiarisation trips for accommodation staff in the market towns of the Wolds around Louth

The market towns of Caistor, Market Rasen, Horncastle and Louth provide a good base from which to explore the area for people who do not wish to stay right on the coast. We recommend a programme of familiarisation visits to local reserves for local hotel staff, guest house and B&B owners in these towns, to help raise awareness of opportunities to enjoy the natural heritage of this part of Lincolnshire. In Caistor, Market Rasen and Horncastle such 'fam trips' could be linked to 'Walkers are Welcome' initiatives.

6.2.7 Familiarisation trips for accommodation staff in the City of Lincoln

The City of Lincoln has a broad accommodation base and is already a short-break destination with much of the tourism activity focusing on the city. It is recommended that a programme of familiarisation trips is mounted for staff at some of the key hotels and guest houses accommodating leisure visitors, taking them to the key sites of nature interest within easy travelling distance of the city (e.g. Whisby Nature Park) so that they are better informed about what to talk to their guests about when asked for recommendations on where to go.

6.2.8 Taming the landscape

There are several notable country houses and estates of varying grandeur and historical association within this area including Burghley House, Doddington Hall (which has a number of ancient trees in its grounds), Elly's Manor House (which has two acres of exquisite gardens), Grimsthorpe Castle (with 3,000 acres of parkland) and Woolsthorpe Manor (where Sir Isaac Newton grew up and where a descendent of the famous apple tree still grows. All of these properties offer a relaxed route into enjoying natural heritage and could form the nucleus of a separate marketing campaign that promotes not just rural historic buildings but also the landscapes created around them. A pilot scheme in the southern part of the county could be

tested before being rolled out more widely.

6.3 Converting day visitors into overnight stays

6.3.1 SealFest

Perhaps the main accommodation providers and hospitality businesses between and including Cleethorpes and Saltfleet could work with the GLNP to develop a Seal Festival – borrow ideas from Gorilla naming ceremonies at Volcanoes National Park (Rwanda), also Amble Puffin Fest (Northumberland) and Spurn Migration Festival (East Yorkshire). The purpose is very definitely not to increase overall visitor numbers but to provide additional reasons for people to stay overnight in the area.

This could include both wildlife viewing opportunities but also an academic/ scientific conference about marine conservation, evening talks and/or a separate folk festival (there are quite a few traditional songs from several cultures about Seal Folk - Selkies or Silkies). The Seal Sanctuary in Mablethorpe and Skegness Natureland Seal Sanctuary could also be involved in developing and supporting this initiative. Such an event could happen in late October/ early November when the seals have come ashore to pup and when most accommodation providers would welcome additional business. This would require co-ordination between the local accommodation businesses, LWT and other partners.

6.3.2 Woodhall Spa Destination Marketing Campaign

The small Victorian Spa Town of Woodhall Spa has a range of overnight accommodation and, located centrally between the Wolds, the City of Lincoln and the southern part of the county, could be a strategically important point from which to explore the destination's natural heritage. As well as existing sites such as the Woodland Trust's Pinewoods site and Ostler's Plantation (the former of which is particularly attractive in spring and autumn), LWT will be developing a major new reserve on the former RAF airfield to the south of the town to extend its existing Kirby Moor reserve.

This provides an opportunity to raise the town's profile as a short break destination for people living within the main catchment area. As well as the aviation heritage there is also an existing golf interest – perhaps a partnership between LWT, the National Golf Centre and the Golf Environment Initiative could be developed to demonstrate that recreation and habitat creation and protection can go hand in hand. Involving the main accommodation businesses in a joint marketing initiative (the current community website¹² is quite dated in design and content) would be a way forward.

A further opportunity for the town would be to host more events during the two Lincolnshire walking festivals – at present it sits between the areas covered by the Wolds Walking Festival (spring) and the South Lincolnshire Walking Festival (autumn). Though geographically it doesn't exactly fit with either, offering walks based in and around the town would put it on the map (literally and physically) and help raise awareness of the product offer. Moreover, it would be possible to link in with the national trails that go through the area – the Viking Way (a long distance footpath) and the Spa Trail and Sustrans Water Rail Way cycle routes.

6.3.3 Hidden Nature at the Head of the Humber

The Humberhead Levels is a flat, low lying agricultural landscape with a number of existing sites of nature conservation interest. It is also easily accessible from South and West Yorkshire, as well as the towns and cities north of the Humber, via the motorway network. Some of these locations are managed by Yorkshire Wildlife Trust rather than LWT (for instance, YWT has major development plans at North Cave) and thus close co-operation between the Trusts in terms of product development and marketing initiatives would be helpful.

¹² <http://www.woodhallspa.org/>

Similarly, co-operating with the RSPB who have a major reserve at Blacktoft Sands would also be valuable, particularly in terms of raising awareness of visitors to this important site of alternative wildlife locations relatively close by. Links with the proposed investments at Crowle Moor would be mutually supportive (see 6.2.1).

Perhaps a '**Hidden Nature at the Head of the Humber**' joint promotion or marketing initiative that builds on the existing work of North Lincolnshire Council with its 'South Humber Collection' initiative¹³ would be worth considering, raising awareness in towns including Goole, Hull, Doncaster, Selby, York, Thorne, Scunthorpe, Knottingley, Pontefract and Castleford of the rich opportunities to view wildlife at the head of the estuary. This could be a largely web-based initiative supported by advertorial pieces in local papers that link with specific events that are being held at sites around the area (e.g. guided walks, evening talks).

6.4 Increasing the range of products offered for which people may be prepared to pay

6.4.1 Marine heritage exhibitions at the Grimsby Fishing Heritage Centre

The Grimsby Fishing Heritage Centre (GFHC) in Grimsby has experienced varying degrees of success over the last 15 years or so but remains an important visitor attraction in the town. There is the potential for temporary exhibitions developed in partnership with North East Lincolnshire Council that focus on the maritime heritage of the estuary and indeed the North Sea, since that is the waterbody that visitors to the Lincolnshire coast will see. Linking in marine conservation messages with the GFHC and also The Deep in Hull, perhaps through an initiative under the Wildlife Trusts' Living Seas programme, is worthy of further consideration as it could provide beneficial cross-marketing benefits to Greater Lincolnshire. Such an initiative could be developed as a twin-centre project with the Discovery Centre in Cleethorpes.

6.4.2 Boaters' guide to the wildlife of the Fens

Some of the rivers and drainage channels of the Fens are navigable and one opportunity would be to prepare a new guide to the natural heritage of the area's waterways for use by boat owners and holiday-makers renting boats in the area. This could be a paid-for guide available at marinas and other staffed moorings, produced in partnership with appropriate agencies. If there are specific locations where there is particular riparian interest, then it is important that appropriate mooring and on-land interpretation facilities are provided to enhance the visitor experience. It is understood the Fenland Waterways Link project has been looking at this though no information appears to have been posted on its website¹⁴ since 2011 and thus an update would be useful.

6.4.3 Making more of the City of Lincoln

The City of Lincoln is a key tourism destination within the county. Whisby Nature Park, a couple of miles to the west and immediately off the main A46 trunk road, offers a range of habitats and a significant visitor centre that already plays a major role in raising awareness of the broader area's rich natural heritage. We don't propose any new ideas for Whisby as it is obviously operating well at present.

Three opportunities that do offer themselves within the City of Lincoln itself and which could attract interest from both residents and holidaymakers already staying in the area are:

- Formalising a little more the opportunities to observe the peregrine falcons at Lincoln Cathedral – local bird watchers to provide telescopes from appropriate vantage points so

¹³ <http://www.northlincs.gov.uk/tourism-museums-and-the-arts/let-us-inspire-you/the-south-humber-collection/>

¹⁴ <http://www.fenswaterways.com/Home/tabid/36/Default.aspx> Accessed 18/10/15

that casual passers-by and shoppers can view them

- Themed boat trips from Brayford Pool along the Foss Dyke and out towards the River Trent, with topics reflecting seasonal variations in natural heritage interest
- A guided walk around the walls of Uphill Lincoln (Roman remains as well as the castle) spotting the relationship between geology and vegetation – building on the excellent leaflet explaining the link between the county’s geology and its buildings. This could be provided as a downloadable podcast freely available to anyone with a smartphone or a tablet – the intention is to get visitors to think about the smaller, micro-aspects of nature.

Some five miles from the city centre are Skellingthorpe Woods, a Woodland Trust site accessible on foot, on horseback and by bike, and currently receiving fresh investment in cycling provision. Opportunities exist here for the Trust and partners to enhance interpretation that explains the management of the ancient woodland at Skellingthorpe and the moves afoot to increase the habitat value as coniferous plantings are replaced.

Skellingthorpe Woods lie within the Witham Valley Country Park, and more too could be made of Lincoln's connections with the River Witham, which provides a good corridor for access and experiencing riverside wildlife on foot and in places on bike. With ever more attention being paid to water management and flood prevention in many parts of the UK, including in Greater Lincolnshire, there is scope for integrating habitat creation and wildlife viewing opportunities into future capital programmes.

6.5 Attracting niche markets from outside the destination

6.5.1 Brigg Cycle Hub Initiative

As home to Falcon Cycles, a major manufacturer of bicycles, Brigg could also be a starting point for themed cycle routes linking sites of natural heritage interest. Developing Brigg as a cycle hub (see what Wooler¹⁵ in Northumberland has done in recent years) could attract another audience for whom the natural heritage and landscapes of Greater Lincolnshire are an important backdrop to their preferred leisure activity. In the same way that Louth is being developed as a centre from which walkers can enjoy the southern part of the Wolds through its strong profile in the annual Lincolnshire Wolds Walking Festival, Brigg could perform a similar function for cycle tourists.

One of the largest international bicycle manufacturers – Giant – recently opened a large retail outlet on the Doddington Hall Estate a few miles to the west of the City of Lincoln. A similar initiative could be developed there in partnership with Giant Store Lincoln and the Estate, creating routes that benefit from existing Sustrans and other routes across Greater Lincolnshire but tying in also with key sites of nature tourism interest.

6.5.2 Burgh le Marsh/ Middlemarsh Farm Wildlife Art Initiative

Immediately inland from the coast is the so-called Outmarsh, once similar in nature to Romney Marsh or the Somerset Levels but now largely well-drained and used for arable purposes. As such, there are few sites of nature conservation interest of a high enough profile to attract visitors and public access is difficult in some areas apart from Middlemarsh Farm, where more than 70 ha of wetland has been restored under the Lincolnshire Coastal Grazing Marshes Project. This landscape would be appropriate for painters and photographers, particularly those interested in wildlife. Local accommodation providers keen to target this specialist market could work with the owners of Middlemarsh Farm on a joint promotion campaign presenting the area as one where there is subject interest for them at any time of the year.

6.5.3 Woodhall Spa Habitat Creation and Management Field Centre

With the major habitat creation and restoration proceeding at the former RAF airfield at

¹⁵ <http://www.wooler.org.uk/cycling/373-wooler-cycle-hub>

Woodhall Spa, and the work that the National Golf Centre carries out in partnership with Natural England on its Hotchkin Course, which is a SSSI protected for its heathland habitat, there is an opportunity to develop relationships with natural sciences departments from Universities across the East Midlands and beyond, promoting the town as a destination for field trips to explore conservation in action. This could also provide opportunities for the collection of baseline data and ongoing monitoring data on a range of topics, supporting the work of all of the agencies concerned. If accommodation provision in the town itself is out of the price range of university groups, using student accommodation in the City of Lincoln for field visits during vacations could be an alternative option.

6.6 Developing initiatives for existing residents

6.6.1 'It's the little things that matter' – education programme

Education programme linking primary schools with their nearest nature reserve (plays on the 'little things' trope) – LWT and other conservation organisation rangers and wardens plus education services from LWT and other agencies and organisations provide field visit opportunities to link in with Key Stage 1 and Key Stage 2 learning objectives for Science¹⁶. This element of the marketing campaign might attract sponsorship from a major electronic/IT corporate manufacturing or selling micro-technology. A partnership with the Teacher Education department at Bishop Grosseteste University might be of value here as well as would working with Common Ground¹⁷, the charity which celebrates local distinctiveness. Targeting youngsters, it could also be used as a route for encouraging return visits by families

6.6.2 Fungus forays for migrant workers

Witham Country Park and Local Nature Reserve in Boston offers a range of educational and recreational opportunities and there has already been investment from the local NHS Trust in outdoor exercise equipment. Boston has one of the highest proportion of Eastern European residents in the UK¹⁸ which offers an opportunity to develop specific initiatives targeting this group. For instance, Poles have a tradition of collecting fungi from woodlands and forests around their homes – a programme of guided walks around Witham or other suitable locations nearby could offer an opportunity for them to understand a little more about the natural heritage of the Fens. Reaching the Polish community through the local Catholic church has been a proven route in other locations, such as Ryedale in North Yorkshire. A pilot project in Boston, if successful, could be rolled out to other locations where there is a resident population of migrant workers from Eastern Europe.

6.6.3 Appreciating the landscape through art

The National Centre for Art and Design in Sleaford¹⁹ could work with partners in Brigg at the northern end of the County on the "Lincolnshire – Get the Picture" initiative to promote the best in wildlife and landscape art – perhaps one could work largely with professional artists and the other with amateurs, or one to work with paintings and photography, and the other with sculpture.

6.7 Summary of initiatives and concluding remarks

The purpose of this report has been to provide guidance to the GLNP on the current scale and value of public engagement with the natural heritage of Greater Lincolnshire, and to propose opportunities for action to increase the value of nature tourism to the regional economy.

¹⁶

https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/425601/PRIMARY_national_curriculum.pdf Consulted 10/10/15

¹⁷ <http://commonground.org.uk/>

¹⁸ <http://www.theguardian.com/uk/2012/dec/11/census-boston-eastern-european-immigration>

¹⁹ <http://www.nationalcraftanddesign.org.uk/>

Using a wide range of secondary data sources, some baseline information has been provided (Chapters 3 and 4) on the likely volume and value of nature tourism (including day visits by residents of the study area). It is recommended that additional primary research is carried out in the coming years to provide data on rates of engagement with the landscape and with wildlife, and on spending patterns by these market segments, that is specific to Greater Lincolnshire. Securing such information will enable a more robust calculation of the economic impact of such activity to be prepared. At the same time, some primary research with key market segments on motivations for engaging with the natural environment across the study area, and on perceptions of the current product offer, will allow the development of more tailored marketing and product development initiatives in particular.

Such primary research could include:

- Interviewer-administered site surveys at established nature tourism locations, gathering relevant information from visitors including personal and trip profile information; engagement patterns with nature and wildlife (both in 'daily life' but also when on holiday) and awareness of, and usage of, different nature tourism locations across Greater Lincolnshire. It is helpful to have a standard questionnaire that can be used at multiple locations across the area, so that results can be compared from site to site. Such surveys should be carried out at different times of the year to identify seasonal variations, and at different times of the day as well. Designing and adopting a standard questionnaire also allows it to be administered by different interviewers including site wardens; volunteers and external interest groups (e.g. school, college, university students), thus building up a large body of data
- Focus groups with regular users and non-users of nature tourism sites, using professional interviewers and facilitators, to gain a better insight into motivations for visiting and not visiting different sites. Such sessions, though moderately expensive to run, can provide a wealth of qualitative information that can advise awareness-raising and marketing campaigns, particularly when held with specific target groups such as parents with young families, older residents or migrant workers.

The proposed actions presented in Chapter 6 are provided as a catalyst for discussion and development by the GLNP and its partners. Some may in the end may not be feasible; others may require considerable development before they can be implemented but some (such as the familiarisation visits for local accommodation providers) could be piloted during 2016 and reported back to the GLNP annual conference in Autumn 2016.

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Appendices

Appendix 1: Site visits to Nature Reserves and other natural areas for GLNP Nature Tourism project

Place	Date	Observations
Bardney Limewoods (Chambers Farm Wood site)	3/8/15	Excellent network of trails aimed at multiple user-groups, butterfly garden, chainsaw sculptures along tracks, range of habitats easily visible. No refreshments nearby.
Lincolnshire Wolds AONB	3/8/15, 26/8/15	Pleasant rolling landscape. No obvious central points to visit.
Donna Nook	3/8/15, 15/10/15	Recently improved facilities (boardwalk, carpark). Hard to see wildlife for non-specialist, other than seals in Nov-Dec. No refreshments nearby.
Far Ings	3/8/15	Good network of trails and varied habitats, easy access on foot / cycle, near other (non-wildlife) attractions, good for general interest visitors.
Alkborough Flats	13/8/15	Interesting walk, good bird-hide with wide range of easily viewed species, Julian's Bower site of cultural interest nearby. One cafe (farm diversification).
Crowle Moor	13/8/15	Not especially welcoming, little interpretation, no shorter walks, although part of longer Peatlands Way.
Whisby Nature Park	26/8/15	Excellent network of trails aimed at multiple user-groups, range of habitats easily visible. Good cafe on site.
Snipe Dales	26/8/15	Good network of trails, pleasant views of hills. No refreshments on site.
Gibraltar Point	26/8/15	Good network of trails and some interpretation. No refreshments on site but Skegness is close.

Appendix 2: Consultees

Name	Position	Organisation	Date	Ref.
Paul Learoyd	CEO	Lincolnshire Wildlife Trust	3/8/15*	PL
Mike Sleight	Ecology Officer	NE Lincolnshire Council	3/8/15*	MS
Paul Tame	Regional Environment & Rural Policy Adviser	NFU East Midlands Region	6/8/15	PT
John Badley	Senior Sites Manager	RSPB Frampton Marsh & Freiston Shore	6/8/15	JB
Helen Gamble	Project Officer	Lincolnshire Wolds Countryside Service	6/8/15	HG
Tim Allen	Environment Team Manager	North Lincolnshire Council	7/8/15	TA
Martin Redding		Witham 4th District Internal Drainage Board	10/8/15	MR
Chris Manning		Water Management Consortium	14/8/15	CM
Richard Chadd		Environment Agency	14/8/15	RC
Liz Fleuty	Development & Engagement Officer	Canal & River Trust	17/8/15	LF
Andrew Chick	Ecologist & protected species consultant	Independent	11/9/15	AC

* - Interview carried out face-to-face. All other interviews by phone.

Appendix 3: Outcomes of Key Stakeholder Consultations

Introduction

Interviews with a range of key informants and our observations whilst in the field revealed a number of different themes regarding the development of nature tourism in Lincolnshire. In general, there was strong agreement between the different informants as to the obstacles to further development, although in some cases there was disagreement. Initials in right-hand columns denote informants (see Appendix 1). 'LBU' denotes observations by the Leeds Beckett University team.

Strengths

Although the questionnaire surveys revealed a lot of challenges, there is already much to celebrate in terms of developing a nature tourism product – key features are summarised below.

Perceived strengths of nature tourism in Greater Lincolnshire

<i>Strengths</i>	<i>Reference</i>
Some nature reserves are equipped with waymarked paths, hides, interpretation and other facilities aimed at a range of user-groups (including Whisby Nature Park, Gibraltar Point, Chambers Farm Wood / Bardney Limewoods, Far Ings, Alkborough Flats, Freiston Shore).	LBU, AC
Areas of reclaimed land (e.g. former quarries, managed realignment schemes) are easier to develop with a number of different habitats + tourist infrastructure than SSSIs because of fewer planning restrictions and often prove popular. Examples: Whisby Nature Park, Willow Tree Fen, Freiston Shore, Alkborough Flats, Sawcliffe Hill Local Nature Reserve.	PL, JB, RC, TA
The old airfield at Woodhall Spa (recently bought by LWT) is scheduled for reclamation as a 'Living Landscape', part of a matrix of nature reserves.	PL, RC
Some areas are beginning to work well as 'clusters' with a range of attractions, e.g. the Clay Pits area along the south bank of the Humber: Water's Edge at Barton-on-Humber, The Tileworks, Far Ings, Winteringham (gastropub and well-known restaurant), Alkborough Flats (Julian's Bower heritage site). Cycle and walking trails connect many of these.	TA, LBU
Good network of trails (walking, cycling, carriage-driving) in the Wolds	HG, LBU
Good-quality accommodation is increasing, e.g. converted farm buildings (self-catering).	PT
The RSPB has plans to create more facilities at Frampton (larger visitors' centre, educational trips, boardwalks).	
North Lincolnshire Council is leading on Landscape Partnership project covering the Isle of Axholme and Hatfield Chase. If successful, this would tie together and promote cultural and natural heritage features.	TA
Waterways attract narrow-boats and other pleasure craft, there are moves to improve facilities and link with land sites/attractions (at least give more information on them).	MR, LF

Challenges

The considerable challenges faced by GLNP in progressing any initiative to grow nature tourism in Lincolnshire are many but, in our opinion, not insurmountable given the undoubted positive feelings shown by most of our consultees and respondents. A summary of key challenges is presented below.

Challenges facing the development of nature tourism in Greater Lincolnshire

<i>Issues</i>	<i>Reference</i>
Lack of enthusiasm for tourism by residents, verging on opposition, resulting in failure to take up economic opportunities, e.g. promote local food products. This is partly due to wealth of agriculture - land is mostly Grade 1, very productive. Striking example: opposition by locals to seal-watching at Donna Nook + failure to take advantage of presence of 60,000 visitors.	PL, PT, JB,
Some places are rich in wildlife but it's difficult to see.	PL, MS, LBU
Lack of infrastructure for tourism, especially good quality accommodation / eateries, especially in comparison with the North Norfolk Coast (although NNC was described as 'over-priced' for some markets).	RC, JB, HG, AC, MR, CM, LBU
Weak promotion of nature tourism opportunities, e.g. no central internet source of information, lack of cross-promotion, 'silo' approach to promoting specific areas such as the Coastal Country Park. Failure to make best use of social media for specific markets, e.g. birders. Weak promotion of tourism generally, e.g. VisitLincolnshire experienced major funding cuts, Boston has very limited promotional resources, could play a leading role.	AC, LBU, LF, JB, TA, HG, CM
Perception by potential market that Lincolnshire is all flat / fenland + coastline facilities (where they exist) are aimed at low end / mass market.	PL, RC, LBU
Lack of coordination between relevant organisations, verging on conflict of purpose, e.g. reluctance to promote tourism at Crowle Moor; a 'Lincolnshire Wolds in the Making' report didn't involve staff at the AONB.	TA, HG, LF, RC
Poor communication between conservation organisations and local communities	PL, LBU
Lack of central nodes of attraction (honeypots) within the Lincolnshire Wolds AONB.	LBU
Excessive number of scattered carparks along coast, affecting wildlife, rather than concentrating visitors in a few places.	PL
The proposed cable duct from the Triton Knoll offshore wind-farm would arrive an Anderby Creek, one of the few 'nodes' of mid-market accommodation on the coast.	PT
Some projects have been started but not followed through because of lack of funding, e.g. Grazing Marsh project, Fens Waterways Link	CM, RC, LF

Appendix 4 Findings from primary research with GLNP stakeholders

Introduction

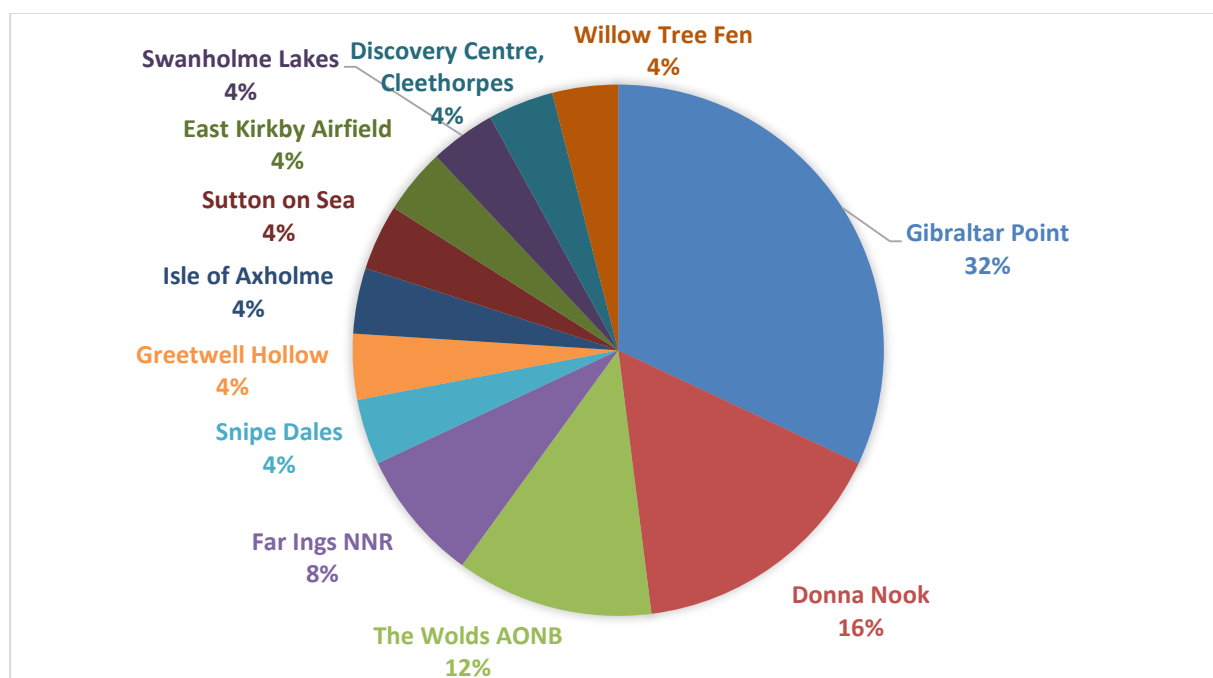
Two similar versions of an online questionnaire were designed to capture information from a range of GLNP stakeholders, including public, private and third-sector supporters and also LWT members. The areas of questioning were about their views on the best places to gain an understanding of the area's natural heritage; undiscovered places or 'best kept' secrets; challenges, barriers and opportunities. The questionnaire was live between July and August 2015 – links were circulated by LWT to its members and also to GLNP stakeholders.

In all some 26 LWT and 55 GLNP Stakeholders responded to the questionnaire, providing a wealth of data that initially informed the detailed stakeholder interviews but which also stands alone as a useful source of information guiding our final recommendations.

Q1 & 2: What is the best place for visitors to enjoy & understand the natural heritage of Greater Lincolnshire

The exact question was: "Which location, from your point of view, is the single best place for visitors to enjoy and gain an understanding of the natural heritage of Greater Lincolnshire?" As can be seen from the figure below, 13 different locations were identified though the two major reserves at Gibraltar Point and Donna Nook accounted for almost half of all responses.

Figure 20: Single best place as identified by LWT members



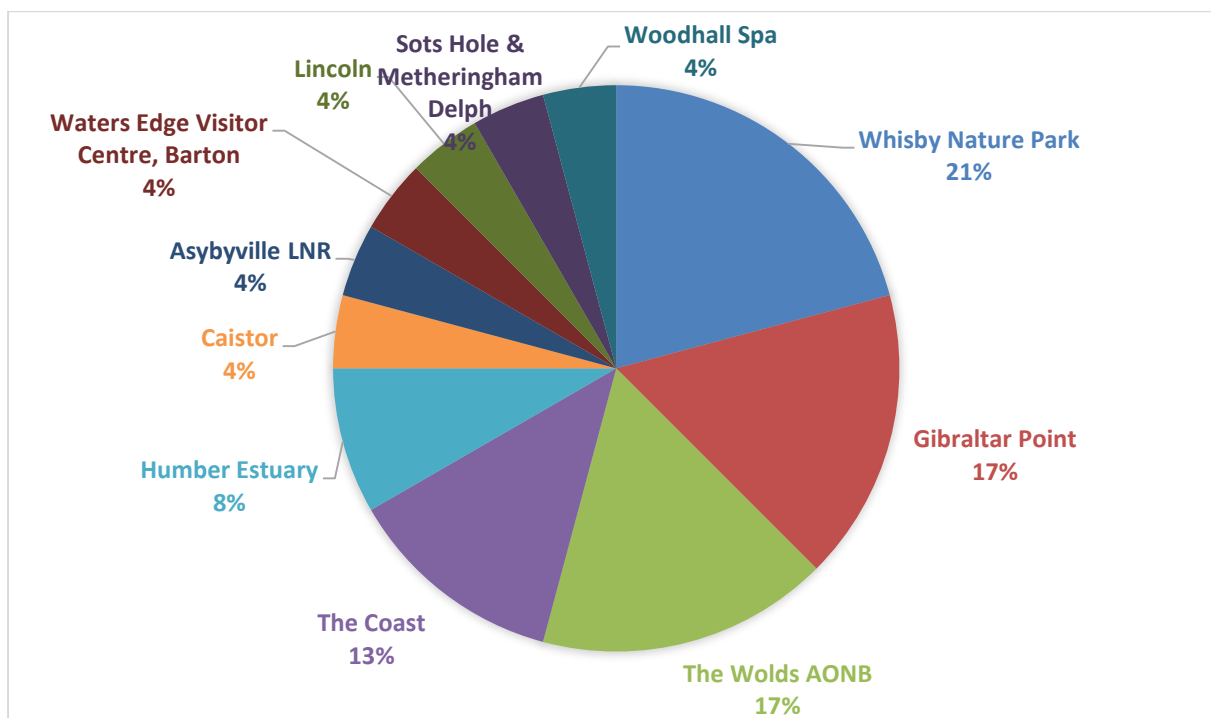
Comments about each of the locations are presented below:

Location	Main characteristics & benefits
Gibraltar Point	<ul style="list-style-type: none"> • Diverse range of habitats and wildlife and has visitor facilities (when restored) • Size, history • Sun, sea, sand and wildlife but without too many people. Ideal. • The place is amazing and does incredible conservation work • Well established nature reserve with good facilities • A large part of Lincolnshire is the coastline • Diversity of site from marine to woodland with relevant change in salinity.

	<ul style="list-style-type: none"> • It's a surprising haven of peace and nature beside a busy seaside resort. The juxtaposition makes it even more wonderful. Watching skylarks there is great!
Donna Nook	<ul style="list-style-type: none"> • The sheer spectacle of the seals • Lots of flowers, birds and small animals • Truly a still wild place
The Wolds AONB	<ul style="list-style-type: none"> • Beautiful landscapes, wide open views, great seasonal changes and diversity of wildlife. • Variety of land use, wildlife sites and nature reserves • Interesting, largely unspoilt, you can see for miles without much sign of habitation, wonderful old houses, good footpath (better than anywhere else in England. Hares, birds, wild flowers, medieval churches, deer occasionally, foxes, badgers.
Far Ings	<ul style="list-style-type: none"> • Merging of several habitats close to the reserve • It is the closest place to where I live that contains detailed information about the natural heritage of Lincolnshire
East Kirkby Airfield	<ul style="list-style-type: none"> • Much history for all to learn
Swanholme Lakes, Lincoln	<ul style="list-style-type: none"> • It is so accessible, right in the city, and yet still always very quiet. A fine example of an old industrial area that is now a nature reserve
Discovery Centre Cleethorpes	<ul style="list-style-type: none"> • It is near the beach and lots of information
Willow Tree Fen	<ul style="list-style-type: none"> • You can take your dog with you
Mill Hill Quarry SSSI	<ul style="list-style-type: none"> • Small, easily accessible, wildlife, archaeology and geology all in one place
Snipe dales	<ul style="list-style-type: none"> • It has all the diversity, birds flora, and beauty in all seasons
Isle of Axholme	<ul style="list-style-type: none"> • Kept for farm land and low lying
Sutton on Sea	<ul style="list-style-type: none"> • It's great
Greetwell Hollow	<ul style="list-style-type: none"> • Rich wildlife and geology

When asked the same question, GLNP members responded with a very different list though Gibraltar Point still featured heavily. However, Whisby Nature Park just outside Lincoln was the most popular site mentioned apparently because of the two key benefits of accessibility to key target markets and the diversity of habitats there. What does resonate with the previous results however is the importance of the coast, with coastal locations representing 42% of all responses. At between 12% and 17% of responses, the Wolds AONB appears to be less significant as a potential nature tourism resource than anticipated.

Figure 21: Single best place as identified by GLNP stakeholders



Comments made by the stakeholders about these locations are summarised below.

Location	Main characteristics & benefits
Whisby Nature Park	<ul style="list-style-type: none"> • It's local to me, and the one place I can visit frequently with my family and still be blown away by the beauty of the damselflies, dragonflies and inspiring birdlife in and around the lakes. Good facilities present for visitors and well worth the modest car parking fee. • Large area with lots of obvious wildlife and good facilities for all ages • Biodiversity, facilities and accessibility (location) • It caters for different ages and levels of nature interest - so can be appreciated by many. Close to Historic Lincoln with an established visitor economy ...great opportunities for extending the City's tourism offer. • Combination of natural environments, birds and visitor services
Gibraltar Point	<ul style="list-style-type: none"> • Best range of coastal habitats • One of the largest & most important sites, with varied habitats, coastal species. • Un-spoilt coastline • Scale, naturalness, diversity
The Wolds AONB	<ul style="list-style-type: none"> • Panoramic views over landscape including the coast/fens • Because it's a nationally important protected landscape • The Wolds and how important they are to farming and wildlife, with the Wolds you have Farming and wildlife and important water resource
Coastline	<ul style="list-style-type: none"> • Diversity of habitats and species throughout year. Visitor facilities at Frampton Marsh, Gibraltar Point and LCCP Saltfleet • Due to the amount of wildlife on our coast. • Wild and unspoilt which has shaped the coastline to what it is today

Humber Estuary	<ul style="list-style-type: none"> • The Humber estuary and its hinterlands provide a good cross section of the different habitats present in the wider county from coastal to agricultural. • Access and mosaic of natural interest features
Lincolnshire Wolds Chalk streams	<ul style="list-style-type: none"> • Easy to access, lots of history, lots to see, lovely environment
Caistor	<ul style="list-style-type: none"> • Views, wildlife, architecture, public access
Ashbyville LNR	<ul style="list-style-type: none"> • Brownfield site being heavily used now by local people & visitors from a much wider area
Waters' Edge Visitor Centre, Barton	<ul style="list-style-type: none"> • Over 100 acres of country park with diverse habitats along with a visitor centre with displays and facilities
Lincoln	<ul style="list-style-type: none"> • Amazing city, unspoilt historic quarter with stunning views of county; cathedral; castle; museums; commons
Sots Hole & Metheringham Delph	<ul style="list-style-type: none"> • This part of Lincolnshire is a good example of the man-made nature of the fens of south Lincolnshire and how it can sustain great habitat too!

Q3, 4 & 5: What is the best kept secret?

The question wording was: "What do you think is Greater Lincolnshire's best kept secret, in terms of its landscape or its wildlife?" Respondents were then asked to justify their claim and indicate also whether or not it should be shared with visitors (this was asked as some assets may be compromised with too much access, and there is also always a debate within tourism about the ethics of sharing popular local recreational resources with outsiders). What is interesting from the list below in Figure 21 (which has been reordered alphabetically) is that the Wolds begin to be identified as an undiscovered secret, as indeed does the coast. So this would appear to indicate that on an area resource, rather than point resource basis, there is still a need for enhanced marketing that sells the nature tourism benefits of these destinations. Several people mention the rich flora of the area and there is one unusual species – *Lophopus Crystallinus* – mentioned that could be of significant interest to specialist groups of freshwater biologists.

Figure 22: Lincolnshire's wildlife and nature tourism secrets, according to LWT Members

What is the best kept secret?	Why?	Shared?
Boultham Mere	It's like an oasis of tranquillity within the area of Lincoln city	Yes
Candlesby Hill Quarry SSSI	Very limited parking off a main road therefore infrequent visitors	Yes
Coast	People go elsewhere. Lincs doesn't have a reputation for beauty	No
Donna Nook	Still unspoilt by visitor centres	No
Eco- Centre	It's hidden but fab	Yes
Fen drainage east of the A 16	Network of small drains with no protection.	Yes
Gibraltar Point	The amount of people who are stunned when I tell them there is an important nature site right beside Skegness is overwhelming	Yes

Greetwell Hollow	Spectacular and unspoilt	Yes
Greetwell Hollow and Old Quarry	Spectacular, unique, most locals aren't aware of it. Fine colonies of wild orchids, so much to see, varies so much over the year	Yes
John Harrison Foundation Longitude Wood	Not many people are aware of it yet	Yes
Limestone ridge, S Lincs.	Fragments only still semi-natural, but very good	Yes
Lincolnshire Wolds	everyone can explore the beautiful area on foot or by transport	Yes
Lophopus Crystallinus	Amazing bryozoan (Fauna) – also known as Bellflower	No
Low human population large areas undeveloped.	Poor road infrastructure and eastern location	No
Red Hill Coronation Meadow	Fantastic wild flowers, insects, butterflies, geology & wonderful views of the Wolds as well as Lincoln Cathedral on a clear day!	Yes
Rimac Nature Reserve	Total hidden gem with utter wildness and beauty	Yes
Saltfleetby/ Theddlethorpe	Lovely natural open space	Yes
The dales of the Lincolnshire Wolds	The rolling landscape, perfect for walking and cycling, is easily comparable to the Cotswolds or South Downs except that no one knows it's there	Yes
The Lincolnshire Wolds	Beautiful landscapes, wide open views, great seasonal changes and diversity of wildlife.	Yes
The Wash	You have to work at it to really appreciate the landscape. But the skies and wildlife make up for that.	Yes
The Wolds	The amazing views and Viking way	Yes
The Wolds	Stunning landscape which always amazes on each visit	Yes
The Wolds	because everyone thinks of the wash, the coast and New Holland	Yes
Willoughby Meadow	The flowers and grasses	No
Wolds for landscape, 'wild coast' for wildlife	"Lincolnshire is flat and boring"	Yes

The GLNP stakeholders were far more likely to mention the Wolds and given that many of these respondents represent organisations with the potential to assist with funding and delivering nature tourism objectives, their views should be noted with particular interest. Also of note is the increased mention of the Fens and also the more remote parts of the coast – taken together this provides some early support for ideas around marketing Greater Lincolnshire's natural heritage around 3 or 4 key landscape types.

Figure 23: Best kept secret according to GLNP Stakeholders

<i>What is the best kept secret?</i>	<i>Why?</i>	<i>Shared?</i>
All inland areas	Many people don't explore away from the coast	Yes
Crowle/Thorne Moors	Incredible landscape, diverse plants and animals	Yes
Fenland	Disappearing habitat, of which a large proportion is within Lincolnshire. Characteristic species and atmosphere	Yes
Fens	Heritage	Yes
Fens	Heritage	Yes
How it's 'flat bits' were created and kept dry	Even the locals of 60 years don't know what goes on in a pumping station, or even why they're there!	Yes
Lonely little chalk valleys.	Most such environments are privately owned, but could easily be opened to access for people who love such places	Yes
Metheringham Delph	Amazing wildlife, undisturbed	Yes
Reptile populations	Very few people realise we have snakes, lizards etc.	Yes
Roadside verges / Coastal Country Park	Verges-some floristically rich wildlife corridors dissecting intensively farmed landscapes, but not sure visitors would come to visit. LCCP is well visited but visitors don't always recognise the natural heritage of where they are. As it is fairly new and unknown it is under watched by nature enthusiast. There is much potential	Yes
Seals; migratory birds at Gibraltar point; Wolds	Wolds - people don't realise there are hills and hidden valleys	Yes
Seals; migratory birds at Gibraltar point; Wolds	Wolds - people don't realise there are hills and hidden valleys	Yes
The cliff edge to the south of Lincoln	Provides panoramic views over the valleys	Yes
The County's extensive rural landscapes are easily accessible via the extensive PROW and quiet road network across most of the County. The ability to 'get (perceptively) remote' in a short time /distance is a unique feature of the County	The 'secret ' is known an appreciated locally but not promoted nationally.	Yes
The Lincolnshire Wolds	Many people not familiar with Lincolnshire often believe the county is flat and offers little in the way of landscape other than the 'big skies' of the	Yes

	Fens. The Lincolnshire Wolds are not that well known outside the county and offer a rich visitor experience from both a landscape and wildlife perspective	
The springs and blow wells of Lincolnshire	Unique, very important resources but a number are in poor condition and/or often publically inaccessible	Yes
The Wolds	Very few focal points	Yes
The Wolds	Because they are not a destination as such	Yes
The Wolds	Failure to promotion	Yes
The Wolds	Fantastic countryside with flowing chalk streams	Yes
The Wolds	People think Lincolnshire is flat and in the Wolds it isn't. Also beautiful with wildlife interest and can take managed public pressure	Yes
The Wolds	Fantastic countryside with flowing chalk streams	Yes
The Wolds	People think Lincolnshire is flat and in the Wolds it isn't. Also beautiful with wildlife interest and can take managed public pressure	Yes
There are so many - where do I start?	Lincolnshire is seen by the outside world as flat, boring, full of cabbages and wildlife free. 'Twas ever thus	Yes
Viking Way in the Wolds	Diversity of landscapes and tranquillity	Yes
Wild coast	Outside Lincolnshire the coast is known for the arcade resorts	Yes
Wildlife in the fens being discovered at the moment	Not previously known	Yes
Wintering Birds	Never get any publicity	Yes

Q6: Barriers and Solutions

Respondents were asked “*What, in your view, are the main barriers facing the development of nature tourism in Greater Lincolnshire?*” The key themes arising and summarised in Figure 23 are (in)accessibility in part due to the geography of the area; poor transport connectivity and marketing (or the lack thereof). Some useful recommendations for action by LWT are included in the responses and these will be considered later in this document.

Figure 24: Barriers and solutions - Lincolnshire Wildlife Trust (LWT) member responses

Barriers to development of nature tourism in GL	What can be done?	Broader category
Access and people just don't consider the area for holidays etc.	Not much you can do re the roads to get people there but does need to move away from the Butlin's image and push natural space family holidays- we don't have the castles etc. of Northumberland for example but we should push the Wolds, the	Access/ destination marketing

Barriers to development of nature tourism in GL	What can be done?	Broader category
	fenland, the sea	
Subtlety of the landscape	Greater use of GPS	Accessibility
Parking and access for the disabled	Working with local business	Accessibility/Mobility
Accessibility more parking areas	Have more info in all towns and villages, schools, colleges, social media sites	Accessibility/Promotion
Doesn't need developing perfect as it is	No	Against development
People think Lincolnshire is flat and boring	Engaging information to change people's perceptions. Lincolnshire isn't flat: there are beautiful hills and dales. Lincolnshire isn't boring: the wild coast is full of wildlife. We also have great food.	Destination marketing. Negative perception
Government money	Apply for and get more grants	Funding
Lack of government support in protecting nature/economic development at the expense of the environment	Gain public support and campaign government for greater support/protection	Government support
Land bound by farming and farmers	No, you are on a hiding to nothing.	Land ownership
Developers & vision	A task force	Management
lack of 'joined up' sites	Connectivity of habitats/natural corridors	Merging/ Corridors
Changing habits	No	N/A
Apathy and pre - conceived ideas	More information and higher profile i.e. Bigger website, media coverage, regular talks/events/fundraising in clubs, schools etc.	Negative perception
[Negative] perception	More and larger nature reserves	Negative perception/ Destination marketing
Money	Young ambassadors	Promotion
People outside of Lincolnshire simply don't think of Lincolnshire in any way (apart from possibly to make jokes about Skegness). I say this as someone raised in Lincs and now living away.	Just let everyone know how beautiful Lincs is	Promotion
Lack of awareness and funding	Advertise over a wide area	Promotion widely
People's expectations, or lack of them, lack of awareness, reluctance to get outside, and a	I'm confident that LWT are already doing a lot. Is it mean to ask for more awareness raising and income generation?	Promotion/finance

Barriers to development of nature tourism in GL	What can be done?	Broader category
fear that "wild places" are somehow dangerous and best avoided. Also cash obviously; disposable income for people to travel to beautiful places, and money to develop areas for nature tourism		
Public not appreciating what they have around them for free!	They use social media well but perhaps have more of a presence in areas of densely populated attractions such as theme parks and seaside attractions. They are doing a pretty good job though so perhaps people need to make themselves more aware of their beautiful environment	Public support/ lack of education
Ruining, by too many people coming	Leave them [PA's] as they are, and don't change	Social/overcrowding
Too many people in a small place at one time	Not a lot. If anything.	Social/overcrowding
Inadequate public transport and limited parking at many remote sites	The wider issue of inadequate transport could be raised with the relevant bodies, public health of body and mind being a focal point	Transport
Public transport isn't very good but then people like to use their cars. Sadly, the village pubs have declined. Farming is a great asset but spraying crops harms insects and thence everything else	I think LWT does a great job. But I don't know, maybe nature is more important than tourism?	Transport
The road and rail systems are a disgrace. Not enough footpaths across farmland and not enough access to rivers and drains for canoes/kayaks	Lobby for more open access and put pressure on government for improvement to infrastructure	Transport/Accessibility
Poor public transport system and not everyone owns a car	Run day trips to reserves in Lincolnshire with guides	Transport/Product development

When this same area of questioning was asked of GLNP stakeholders (Figure 24), a much broader range of issues was raised. Key issues coming out of these respondents were land ownership; access in its broader sense; and marketing and promotion. The need for more partnership working was also raised several times, as was the need to be more 'canny' in drawing down or otherwise securing funding for relevant initiatives.

Figure 25: Barriers and solutions– GLNP responses

Barriers to development of nature tourism in GL	What can be done by GLNP?	What can be done by others?	Broader category
Access to these areas	Little as we have little control of land or property access.	County Council Highways Authority to create improved access routes. Others areas/structures are in private ownership	Access/ land ownership
Accessibility. Perception of what Lincolnshire can actually offer	Identify and promote wheelchair friendly routes	Find a means of replacing stiles/kissing gates with accessible entry/exit points	Accessibility/ destination marketing
Networks	Very little without finance in place	Better/increased navigation links	Accessibility/ transport
Viewed as a coastal seaside destination	N/a	Marketing	Destination marketing
Uncoordinated approach to marketing	I guess so	I guess so	Destination marketing
Lack of resources to promote and protect these areas	We would if we had the resources	To make them [PA's] more accessible, both physically and mentally	Destination marketing
Perception of Lincolnshire as a 'beaches and sandcastles' destination and a lack of effective promotion of its wider offer	Humber nature partnership works with GLNP to increase understanding of the natural environment. We have recently worked with estuary TV to produce a series of 6 television programmes about the Humber estuary which are being shown on estuary TV and are also available on YouTube. We will shortly be launching a smartphone app which showcases some of the best opportunities to view and learn about wildlife on the Humber	Need greater recognition of the economic value of nature tourism.	Destination marketing/ promotion
Funding and appropriate promotion	Provide managed public access to its increasing number of sites and appropriate promotion	More funding and strategic planning from local authority and more support financial and in other ways from LEP.	Funding

Barriers to development of nature tourism in GL	What can be done by GLNP?	What can be done by others?	Broader category
		Also tap into Europe.	
Funding, accessibility	Not sure	Not at the moment	Funding/ accessibility
Lack of a strategic approach to understanding the visitor market and their infrastructure needs means investment in realising the potential has not been locally prioritised. Identifying shared partnership objectives with the existing heritage sector and health/sport visitor markets would help to raise the profile and realise the potential	City of Lincoln Council supports the visit Lincoln initiative and would be keen to be involved in developing the visitor market in support	Recognise the wider visitor potential and prioritise resources for investment in strategic sites	Infrastructure/ partnerships/ markets
Developing a single co-ordinated nature tourism trail	We can contribute to communicating nature tourism via our experience of app development and local TV programme production	Yes local business and communities could contribute to the process by identifying and promoting nature tourism areas	Interpretation
Ignorance on the part of those involved with tourism, i.e. The answer lies in education	Just continue what we are doing - i.e. More of the same, but be persistent	As with so many things, it basically comes down to education. The story needs to be understood and disseminated.	Lack of education
Lack of awareness of what Lincolnshire has to offer. Poor image of Lincolnshire. Lack of quality facilities in some areas	Promote the natural assets/ attractions of Lincolnshire. Linking attractions to encourage visitors to stay longer in Lincolnshire rather than day visits	Work in partnership to attract visitors. Encourage investment in quality facilities	Lack of facilities/ promotion / perception

Barriers to development of nature tourism in GL	What can be done by GLNP?	What can be done by others?	Broader category
Private ownership and/or a lack of appreciation for the opportunities among landowners	Outline the opportunities & potential revenue that could be derived. Encourage funding bodies to give incentives. Provide data on species and their relevance	Provision of incentives from LEP. Public activity days (LCSP) - these already happen	Land ownership
Limited access from private landowners	Yes and we do by declaring sites as LNRs and maintaining PROW	Yes, allow more freedom of access	Land ownership
Quite a lot of the landscape is being farmed and isn't open to the public and that towns and villages are quite far apart meaning that you have to travel far to get to places.	I don't think we could offer much. We would like visitors that visit greater Lincolnshire to reconnect with where their water comes from and what a precious resource it is to us all and to wildlife. Just because they are on holiday and away from home they should still respect where it comes from and what they dispose down toilets	Help to re-enforce our key messages about water use and what know to flush down toilets	Land ownership/accessibility
No integrated plan	No	Local authorities need to get better local collaboration	Management
Publicity and the locals don't see it	Yes	Yes	Marketing/public support
Relatively small islands in a remote area - better join up needed	Support improvements to river corridors	County wide green infrastructure strategy/plan. County wide tourism strategy that integrates natural with more traditional	Merging/corridors
Lack of nature/wildlife	Not sure	Yes	N/a
Flat, boring etc.	We do our best, by being present at shows and events, giving talks and so on	Same	Negative perception/public support
Perceptions	Develop tourism offers even more	Develop tourism offers even more	Promotion
Issues with limited	Continue to help promote key wildlife	Help to promote the multiple benefits of	Promotion / access

Barriers to development of nature tourism in GL	What can be done by GLNP?	What can be done by others?	Broader category
infrastructure; strong emphasis on highly commercial farming.	sites with good public access and work positively with the farming/landowner community through open farm Sunday events and other events/opportunities etc.	a landscape approach that can combine/promote sustainable food production, nature conservation/enhancement with public access for local recreation and tourism	
Fragmentation of habitats and small size of remaining sites. Lack of public transport links. Wider landscape lacking in trees	Potential for linking canal network to surrounding wildlife sites, through interpretation and physical linkages (green infrastructure)	Similar linkages. Arable reversion. Requires change from highways and landowners	Transport/habitats

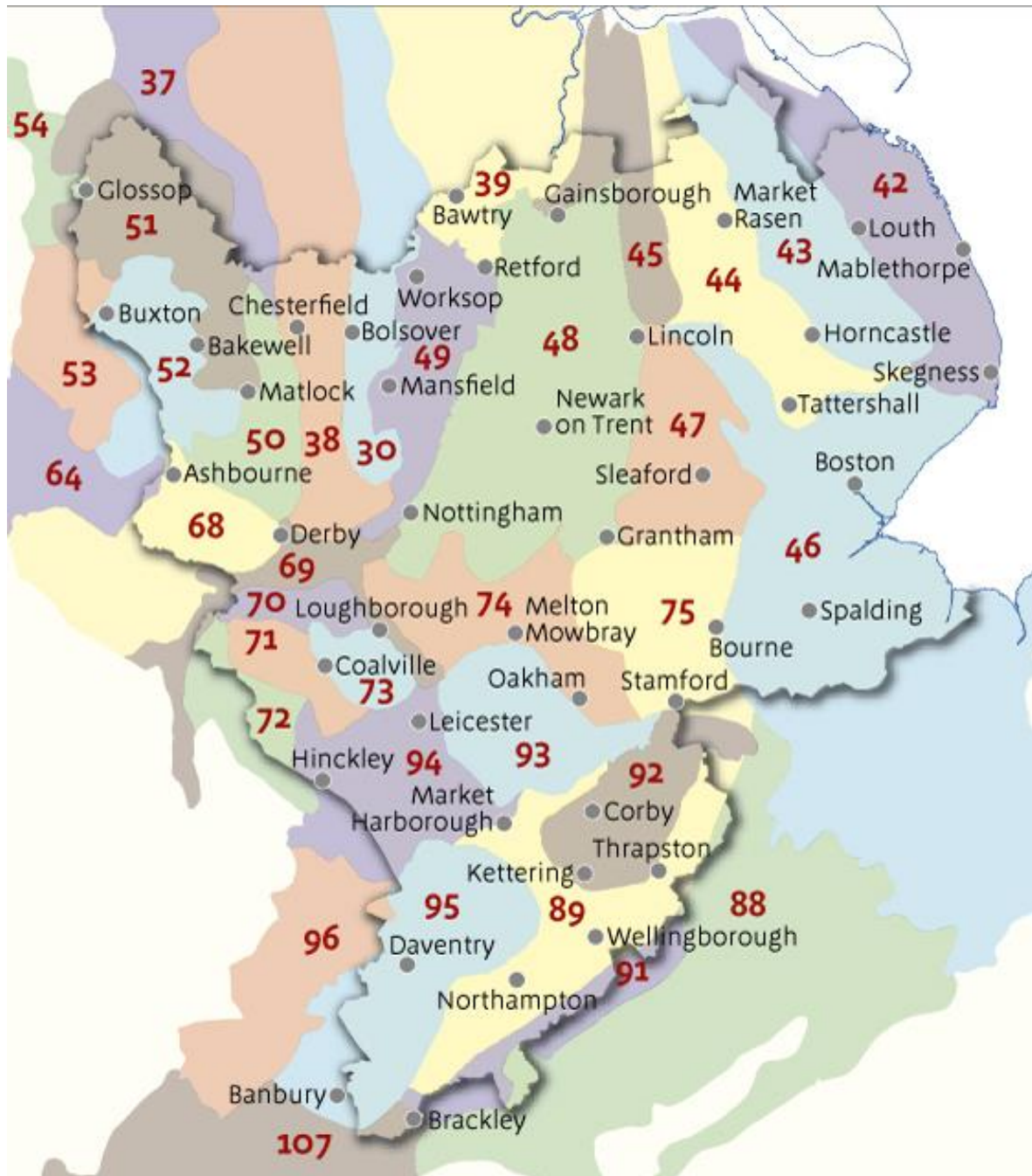
Future investment opportunities

Respondents to the GLNP stakeholder study were asked: “*Finally, what is the one piece of investment that you would like to see in Greater Lincolnshire's nature tourism product?*” The responses are presented below in alphabetical order in order to avoid, at this stage, any sense of prioritisation.

- A revenue commitment for a Project Officer to plan and coordinate priorities and delivery
- A single plan that all local authority and charitable organisations can sign up to and promote
- Acquisition of large area of Wolds to revert to chalk grassland
- Bring back Visit Lincolnshire
- Establishing a brand and reputation
- Funding for educational facilities on sites
- Funding towards increasing awareness by tourism providers of the value of Lincolnshire's natural assets, including better access to information
- Greater use of future technologies, enhanced broadband services to help aid tourism networks
- Increased accessibility
- Investment by LEP in natural environment (e.g. purchase and/or management of reserves)
- Investment in larger landscapes and linkages between them
- Media coverage
- Placing a financial value on what nature brings to the county - both for tourism and agriculture
- Proper off-site parking arrangements for Donna Nook seal season
- The creation of a single nature tourism map highlighting the key features of Greater Lincolnshire's nature tourism but communicated via a multi-media platform - App/local TV/radio/web/literature/interpretation boards
- To see all operators of accommodation and visitor attractions made aware of what is out there, and how this can attract more punters
- Visitor centre at Donna Nook
- Visitor facilities on Crowle/ Thorne Moors with way marked paths and interpretation
- There a number of key themes arising from the above responses:
- Improved access
- Enhanced and co-ordinated marketing and promotion to potential visitors and to local businesses
- Investment in product development, including new visitor centres and associated infrastructure
- Reinstatement of some habitats and the creation and management of wildlife corridors between key point resources

These and other key topics were explored in consultations with key stakeholder representatives.

Appendix 5: Map of National Character Areas (NCAs) in the East Midlands



Source: <https://www.gov.uk/government/publications/national-character-area-profiles-data-for-local-decision-making/national-character-area-profiles#ncas-in-east-midlands> Accessed 31 January 2016