



Marketing the Natural Environment of the Northwest

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1. Executive Summary

Findings

- The aim of this study was to map the environmental assets of the Northwest, recommend marketing opportunities and better ways of working together, while ensuring sustainability.
- We developed eleven classifications of the natural assets, (eg habitat sites, woodlands; viewpoints; coastline) and mapped these as well as activity locations and seasonal highlights.
- The audit revealed that the Northwest has an outstanding natural environment with a justifiable claim to be the best in England.
- It also became apparent that there is considerable under utilisation of the majority of natural assets for tourism and so scope for attracting more visitors, with appropriate visitor management.
- Private sector provision in tourism and the natural environment is relatively underdeveloped in the Northwest which currently limits the potential for exploiting the market opportunity. Support for and expansion of the sector would both respond to and help grow the market.
- Collaboration among natural asset site owners and among tourism and environmental interests is limited; but there is widespread recognition of the need for it.
- A review of marketing activity revealed there is no sustained and consistent effort to promote the natural environment of the Northwest. At regional and area level it tends to be used as a backdrop.
- The marketing capacity (people, budgets and skills) within organisations owning and managing natural assets is limited.
- An analysis of market opportunities identified two priority segments with a propensity for natural environment based short breaks - UK 'Cosmopolitans' and 'Traditionals' empty-nesters.
- There are particular product opportunities around wildlife watching and beaches and coastline.
- There is a major opportunity to use the natural environment more effectively to attract new tourism business to the Northwest challenging perceptions of the declining industrialism of the Northwest outside the region.
- To achieve this potential will need investment in product improvements particularly in interpretation.
- There is a need to define, 'package' and theme natural environment products and experiences, integrating them with the other elements of a holiday or break (good food, good places to stay, charming villages etc).
- Promotion of the natural environment will contribute positively towards inward investment and the food sector in particular. The contribution towards other sectors is less direct and is not likely to be significant.
- Specific economic benefit of a wide ranging programme of action across a region is difficult to measure, however our research indicates from £25M to £115M additional spend and between 1,000 and 4,600 additional jobs could result.

Recommendations

- On the basis of our findings we recommend 8 main actions and 12 support actions in the following categories:

- Marketing
- Product Development
- Collaboration
- We propose a 3 year action plan at the end of which a major evaluation should be undertaken.
- The key actions are:
 - A targeted marketing campaign led by NWDA driving visits to a new natural tourism website created using the maps and data gathered in this work; and having innovative features such as pod-casts.
 - An interpretation challenge fund to channel investment to improving the visitor experience.
 - A Natural Tourism Product Development Manager to support practical business-focused collaboration among tourism and environmental interests; to promote and disseminate new ideas; encourage collaboration on marketing and new product development; and to support business development.

2. Introduction

The natural environment of the Northwest is amongst the best in England. An appreciation of the importance of these natural assets to the economic well-being of the region has emerged over the last few years, and in 2003 a Natural Economy Steering Group was established to maximise the economic contribution of the region's natural assets. This project has emerged from the work of this group and Northwest Regional Development Agency (NWDA) appointed TEAM, destination management and marketing consultants to:

- Assess how the natural environment of the region is currently marketed
- Recommend how this may be improved in the future

Whilst the Lake District is internationally renowned for its scenery, many of the natural assets of the Northwest of England are not nearly so well known. Examples of nationally important natural assets in the Northwest are:

- The largest area of undeveloped dune coastline in England on the Sefton Coast between Liverpool and Southport
- The biologically rich meres and wetlands of Cheshire
- The heather moorlands of the Pennines and the Forest of Bowland
- The limestone hills and woodlands of the southern fringes of the Lake District
- The estuaries of the Mersey, Ribble, Dee, Solway and Morecambe Bay
- The best region in England for internationally important raised mires.

The Northwest has many areas designated for both habitat and landscape conservation, including National Parks, Areas of Outstanding Natural Beauty (AONB), Country Parks, National Nature Reserves, Sites of Special Scientific Interest, Ramsar Sites, Heritage Coasts and so on.

The presumption in commissioning the work was that these areas could make a more significant contribution to the sustainable development of the region through sustainable tourism development, contributing to growth in other sectors and challenging perceptions of the region as a post-industrial urban dominated landscape. Our work has confirmed that the natural environment of the Northwest can be promoted in a much more focused and extensive way to achieve that potential. The primary opportunity is in tourism, but the natural environment also has a contribution to make to other product sectors to varying degrees and to perceptions of the region as a whole. Our work also recognises the worth of investing in, conserving and enhancing the natural assets because of this contribution as well as for the benefit they provide to the lives of the residents of the Northwest.

This work fits into the development agenda for the region described in the Regional Economic Strategy (RES), which contains priority transformational actions in respect of the region's natural environment. It meets both the strategic aspirations for sustainable development and can enhance the image and perceptions of the Northwest.

The RES highlights that 18% of the Northwest is National Park and 11% is AONB.

3. Scope and approach

The project has involved:

- An audit of the regionally significant natural environmental assets within the Northwest which identifies who is responsible for the asset and what marketing is currently undertaken
- A classification and mapping of the natural assets into specific categories
- An assessment of how the natural environment is currently marketed at site level and as a whole
- An assessment of where the best opportunities lie
- Recommendations of how the natural environment might better contribute to the tourism development, image and economic development of the region
- Recommendations as to how and who should market it and in what way it should be marketed
- Recommendations for achieving better collaboration among the various partners and stakeholders
- Articulation of the benefits and impact which might be gained

We have undertaken an extensive consultation with those concerned with tourism and/or the natural environment throughout the region. A list of those with whom we have consulted is contained in Appendix 4. Consultation has taken place individually through meetings, telephone conversations, by email and at two events – one towards the start of the work in September and one sharing the findings and recommendations in December 2005.

One of the early issues we faced was to define what we meant by the “natural” environment and indeed tourism in the natural environment. For our purposes we took the natural environment to mean landscapes and locations which are largely a product of natural processes and appear natural because of their habitats and wildlife (although we do acknowledge that much of the UK’s landscape is the way it is because of the intervention of people and much of the natural landscape is subject to conservation and management to keep it that way). Tourism in the natural environment is defined to mean overnight or day visits which are motivated by the desire to see and experience, or undertake activity within, that environment.

The breadth of this definition also presents a difficulty in pinning down exactly what it is we might promote. There is therefore a need to clearly articulate for potential visitors what the experience is we want them to know about and persuade them to ‘buy’.

4. The Audit

4.1 The natural assets

We very quickly established that information about the natural assets of the Northwest was readily available. Objectives and targets for biodiversity and the natural environment were available through the Northwest Biodiversity Forum’s work and included in Action for Sustainability. The problem is that this information is spread among a number of different sources and largely presented in a way that is of more interest to the specialist than the visitor or general member of the public. For anyone trying to find out about specific sites as a casual visitor or trying to get an impression of the attractions of the area it is not made easy for them. Although the nature and landscapes of the region have been characterised by English Nature and the Countryside Agency, one of the purposes of this commissioned work was to identify those natural assets that could be used to promote the region as a whole and be of interest to visitors.

For this project we drew together information from all these various sources and mapped those assets which had **regional significance** using 11 categories. This is summarised in Table 1:

TABLE 1: NATURAL ASSETS IN NORTH WEST ENGLAND

NATURAL ASSET	NOTES	EXAMPLES
1. Landscape character (with significant natural distinctiveness)	High quality environment which attracts visitors and defines positive image	Arnside-Silverdale AONB Central Lake District
2. Key natural habitat sites	Remnants, sometimes small, very important for wildlife and special interest visitors	Cheshire meres Heather moorland on Bowland
3. Notable species of plants and animals	Species with wide popular appeal	Red squirrels at Formby Osprey at Bassenthwaite
4. Inland water (lakes, reservoirs, rivers and canals)	Natural attraction of inland water and major angling resources	Lake Windermere Cheshire ring canal
5. Viewpoints with easy access (near car parks)	Important popular viewpoints	Shutlingsloe Arnside Knott Alderley Edge (car)
6. Notable mountains and hills	Walking and climbing appeal as well as landscape significance	Pendle Hill Hellvelyn Shutlingsloe
7. Significant woodlands and forests	Important for recreation	Delamare Forest, Cheshire Grizedale Forest, Cumbria
8. Geological interest/mines	Prominent rocks and geological exposures	Whitbarrow limestone pavement Sandstone ridges (Cheshire)
9. Major landscaped parklands (often with historic houses)	Historic and recreational importance	Tatton Park, Cheshire Haigh Country Park, Wigan
10. Coastal landforms -dunes, cliffs, estuaries, saltmarshes	Attractive and important for natural processes	Sefton Coast St Bees Head Ribble Estuary Dee estuary marshes
11. Remoteness and tranquility	Rare commodity in England	North Pennine moors Western Lakes

Clearly natural habitats, species and landscapers are influenced by the seasons and we have also identified the seasonal natural asset highlights in four maps. We have also mapped the main locations for outdoor activities that are based on the natural environment. All the maps and accompanying notes showing the locations of the key sites by each classification are contained in Appendix 6.

4.2 Underutilised areas

In undertaking the audit we also identified those areas where there is high environmental quality and notable natural assets but which are relatively underutilised and under promoted for tourism and recreation at the moment. This revealed that other than certain locations within the Central Lake District, and a few locally popular spots such as sites along the Sefton Coast, Delamere Forest and some of the country parks; the natural assets of the Northwest are often underutilised for tourism and could provide an attraction for more visitors. Clearly this should be

accompanied with appropriate visitor management so that natural assets are not damaged through recreational activities.

Particular locations which we believe have the most potential, based on their natural assets, their capacity to accept visitors (with appropriate management) and the market interest are:

- Solway Firth – coastline & birdlife
- Eden Valley and North Pennine fringes – river valley, woodland, moorlands
- Walney Island/Duddon Estuary to St Bees Head – coastline & wildlife
- Forest of Bowland – heather moorland, river valleys & woodland
- Orton and Howgill Fells – grasslands, moorland birds, spectacular views
- Sefton Coast – coastline, dunes & birdlife
- Peak District Fringe – varied & dramatic landscape, views, canal, birdlife and related heritage interest

But we also consider that the whole Northwest England natural environment could be given a higher profile in national and international marketing. Nearly all the key sites identified in the audit offer wonderful visual images and the potential to surprise and interest the public in “England’s natural environment at its best”.

4.3 Conclusion

The range and variety of the natural environment in the Northwest is outstanding. Much of it is well able to receive more visitors with appropriate visitor management.

5. Private Sector Provision

In the course of this work we reviewed the provision of breaks and holidays based on the natural environment. We found it difficult to source and identify the number of private sector businesses offering such products. The main promotional web sites of the tourist boards do not give such holidays and short breaks much prominence. There are a few useful sites, including TouristNetUK and the Countrylovers’ web site, which provide links to a number of small private sector providers on a regional basis.

From our brief review we estimate there are no more than around 25 or so – at most we would estimate 50 - in the region with most concentrated in Cumbria. In Cheshire and Lancashire there are very few providers of natural environment based holidays and short breaks, despite the potential offered by areas such as the Peak District fringe and the Sefton Coast.

The main private sector provision falls into four main categories:

1. Walking holidays and weekend breaks. These are sometimes marketed by accommodation providers but more often by guiding companies utilising local guest houses and hotels.
2. Activity holidays, mostly aimed at a youth and under-30s market and offered by outdoor centres predominantly in the Lake District
3. Wildlife watching breaks, offered by enthusiasts from their own accommodation or guest houses. Bird watching breaks are by far the largest of these.
4. Conservation breaks and holidays, where participants learn skills and carry out conservation linked projects

Examples of small private sector providers in the Northwest are:

- Cloudberry Holidays (Kendal) offering small group walking holidays using YHA accommodation
- Contour Holidays (Greystoke, Carlisle,) also offering walking breaks
- Mike Robinson Birding Breaks (Beetham, Cumbria) offering wildlife watching, primarily birdwatching, breaks
- Byways Breaks (Liverpool) offering cycling, canal and walking breaks throughout the region.

We contacted a major national and international wildlife holiday company, Naturetrek, based in the South of England. They offer wildlife holidays throughout the world, including short breaks in the UK. They indicated that they would be delighted to offer breaks in the Northwest if a suitable local guide was put in touch with them.

There would appear to be significant potential to expand this provision and to market what there presently is far more effectively if we were to follow the lead set by Scotland who are some way ahead of the Northwest. (see www.wild-scotland.org.uk) which encourages and supports marketing of wildlife holiday companies through membership of the Association. Much could be done to encourage synergy and joint marketing between existing providers which in itself may encourage a growth in the market for environmentally based holidays in the Northwest of England.

Voluntary sector organisations such as the YHA, the County Wildlife Trusts, the Holiday Fellowship, the Ramblers Association, the RSPB and the Wildfowl and Wetlands Trust do provide educational breaks but have limited marketing budgets. BTCV offers working conservation holidays at locations throughout the UK and there are details on their web site. Again there is no central place for the public to research and book such holidays and breaks.

5.1 Conclusion

Private sector provision in tourism and the natural environment is relatively underdeveloped in the Northwest which currently limits the potential for exploiting the market opportunity. Support for and expansion of the sector would both respond to and help grow the market.

6. Collaboration

6.1 The Stakeholders

There are a number of organisations with an interest in the environment and/or tourism. At the regional level, partners interested in promoting and developing the socio economic benefits of the natural environment work together through Natural Economy Steering Group. This group delivers action for the Regional Economic Strategy but at present does not have a clear tourism agenda.

At the regional level the main public and voluntary sector players with responsibility for environmental assets are:

- English Nature
- Countryside Agency
- Forestry Commission
- Environment Agency
- Rural Development Service

- National Trust
- Royal Society for Protection of Birds
- The 3 Wildlife Trusts
- The Woodland Trust
- British Waterways
- United Utilities

The main agency responsible for regional tourism marketing and development is Northwest Development Agency.

At the sub-regional level the five Tourist Boards have responsibility for tourism marketing and development, while there are a large number of environment related bodies ranging from the National Park Authorities, Areas of Outstanding Natural Beauty, and Wildlife Trusts through to particular local area organisations such as the Mersey and Red Rose Forests and initiatives such as Wild Cumbria, the Cheshire Landscape Trust and individual private landowners.

A desire for more, and more effective, collaboration was expressed by many of the organisations we spoke to. There was recognition that the full potential of the natural environment for tourism could only be realised through collaboration from those responsible for managing, conserving and promoting with those responsible for the marketing of the area.

6.2 Conclusion

There are no current channels or mechanisms for a focused productive collaboration to develop and promote the natural environment of the Northwest for tourism.

7. Marketing Review

In tourism marketing many destinations tend to use the 'we've got something for everybody' approach. This reflects partly the complexity and variety of destinations and partly too great a product, rather than market, focus. However destinations are increasingly identifying those products which have a particular strength and market appeal as well as focusing on marketing the experience rather than the place. Difficult decisions are necessary to pursue this route and focus on it single-mindedly to the point where a brand can truly be said to exist in the minds of visitors.

Currently there is no sense in which the natural environment of the Northwest, despite its strength, is used as the core proposition. The question for us in this work was whether the natural environment has the potential to be one of the true differentiators for the Northwest, or whether it is simply a 'hygiene factor' offering the unspoilt countryside visitors expect from a rural break in England.

Our first step in considering this question was to identify how the natural environment is currently used in promoting the region and parts of it. Marketing which either embraces or impinges on the natural environment can be found at all levels and is undertaken by a variety of organisations. Our second step was to look at how some other countries or regions with outstanding natural environments use it in their marketing.

7.1 Tourism Marketing

NWDA promotes the region and the five Tourist Boards promote their sub-regional areas:

- Cumbria
- Lancashire and Blackpool
- Greater Manchester
- Liverpool and Merseyside
- Chester and Cheshire

NWDA is responsible for the image and awareness of the region as a whole, while the role of the Tourist Boards is on generating visits and sales.

NWDA undertakes limited marketing activity at the regional level. It provides a web portal in www.visitenglandsnorthwest.com which profiles the region by location (directing towards the sub-regions), thematically (with 'Coast and Countryside' and 'Walking' being most relevant to the natural environment). NWDA has undertaken a small number of cross-regional campaigns, the most prominent of these being Gardens. The image promotion of the Northwest largely relies on tourism marketing.

The Northwest is generally not promoted as a destination in its own right; rather the marketing of the region is done through the primary brands and themes considered to have most appeal. Of these 'attack brands' only the Lake District has relevance to the natural environment. In addition to the location brands the region has identified a number of 'winning themes' which cut across the region. Those which concern the natural environment are 'Countryside' and 'On the Waterfront'.

All the Tourist Boards take their own particular approaches to marketing their area. Not surprisingly Marketing Manchester and The Mersey Partnership focus on their city offers, although, interestingly, Marketing Manchester is developing a new 'product' for its hinterland called 'Alternative Therapy' which will include tourism in the natural environment. The Mersey Partnership leaves the promotion of the natural assets in its hinterland, most notable of which is the Sefton Coast, to the local authorities. However substantial investment is taking place through the Mersey Waterfront project which covers both the built and natural environment and this will have an impact on both the product and marketing. A new branding exercise has just been completed for what will now be called Sefton's Natural Coast.

Cheshire and Warrington Tourism Board runs a 'Rural Escapes' theme, but this is aimed very much at pampering and indulgence type breaks targeting an up-market female audience. There is recognition in their Destination Management Plan that their Rural Escapes theme needs product development.

Lancashire and Blackpool Tourist Board has defined a number of themes around which they focus their marketing. The two relevant ones for the natural environment are 'Coastal Contrasts' and 'Country Escapes'. The Lancashire product is not well-known and this has enabled the Tourist Board to start from a relatively clean sheet in promoting thematic rather than location-specific breaks. Most of the activity (which is still very recent having only run in the past two years) has centred on Country Escapes where targeted promotional activity has been allied to investment in the product.

Cumbria Tourist Board has the jewel in the natural environment crown, in the Lake District. However it, like the other Tourist Boards, is focused on converting interest to sales; the potential visitor is quickly moved into booking either accommodation or particular products. Whilst it could be argued that the Lake District is so well known it needs no promotion, there are some warning signs that the visitor profile of the Lake District is reliant on older, repeat visitors and in some instances the product is in need of revitalisation. Whilst in its promotion Cumbria generally capitalises on the fact that the Lake District is known to be scenic and beautiful, using strong images as a backdrop, it has recently focused on outdoor activities as a productive route for presenting a more dynamic image and attracting a younger audience. The conclusions and recommendations of this study may provide further opportunities for Cumbria to present itself in new ways to new markets.

7.2 Natural asset owners

There is limited marketing undertaken by most of the asset owners with a few possible exception including the National Trust and RSPB. The majority have limited marketing experience among staff and limited budgets. For most, servicing enquiries with simple leaflets and a web presence; and the distribution of leaflets to Tourist Information Centres and other outlets is as much as they are able to do. The amount of promotional activity to attract new visitors is very limited – an advertisement in the local holiday guide and a general organisation web site is as far as most go.

In some cases, the print and website that is produced has both a corporate and a visitor information job to do – and these do not always sit easily together.

The National Trust is the exception with a number of dedicated marketing staff and a dedicated marketing budget which covers print, press & PR activity and a small advertising budget.

None of this is to suggest that there is not an understanding of the importance of and need for marketing. All the conservation organisations we spoke to were aware of the need to promote their assets to visitors, and saw the benefit of doing so both from an economic and an educational perspective. There was little evidence of the desire to keep visitors out to conserve the natural environment. It is simply that the capacity for marketing and promotion, in terms of resources and skills, is limited. All recognised the importance of recreational capacity and managing the natural resources in a sustainable way. Their limited time and effort tends to focus on managing the interest in their natural assets. An increased effort in regional or area marketing of the natural environment will undoubtedly help provide exposure for these assets. However to see a difference at site level then assistance will need to be provided in any of a number of ways – the employment of dedicated marketing expertise; the increase in marketing budgets; collaboration among site owners; the provision of appropriate images and copy of ease of use etc. We will return to some of these later in our recommendations.

7.3 Other countries and regions

The countries which stand out as using their natural environment as the fundamental positioning are Costa Rica and New Zealand. Closer to home, Scotland and the South West region of England also have strong focus on their natural environment.

Costa Rica- No Artificial Ingredients

Costa Rica is unique in its single mindedness in promoting itself as an eco tourism destination. It positions itself not only on the quality of its environment and biodiversity but also in its sustainable and green policies. This is reinforced by its quality accreditation scheme based on sustainable certification for businesses. All of this gives Costa Rica a **highly differentiated offer** with the usual range of Caribbean products – beaches, activities, culture, families etc. lie **within that offer**.

Whichever way you explore their website www.visitcostarica.com - by activity, location or lifestyle - they lead with the environment and then give you the rest.

"The concept of sustainability will be the fundamental axis of tourism activity and will be considered as the main factor characterising the national tourism product. At the national level..... (the sustainable certification scheme).... represents a new form of competition; a new way to differentiate our tourist industry with respect to our competitors, and one which enhances those tourism products which show sustainability, opening new possibilities for marketing and international promotion. Undoubtedly, this will enhance the country's image as an authentic naturalist tourist destination, thus increasing considerably the competitiveness of our national tourism product." The Costa Rica Tourist Board.

New Zealand – 100% Pure

New Zealand, while not taking quite the pure eco-tourism route of Costa Rica, has built its promotion on dramatic, beautiful and unspoilt natural environment. Its marketing uses the strong awareness of that environment as the basis on which to promote its product offerings which range from activities to eating out; from national parks to volcanoes.

On the web New Zealand has allied strong branding to very practical sales and conversion tools in its travel planner. And further it has combined its tourism site with promotion of other products, inward investment and study opportunities through a 'Do Business with New Zealand' parallel to 'Travel to New Zealand' on the home page of the site www.newzealand.com 'the official site for New Zealand travel and business'.

South West England – It's in Our Nature

The **South West** is one of the few regions in England to have focused on their natural environment to differentiate themselves. They have also integrated their tourism activity with a wider economic development agenda.

This year they ran a press campaign focusing on a number of sectors – tourism, education and business.

"With over 600 miles of coastal path we never get tired of walking. It's in our nature."

"From our leading universities to cutting edge business R&D we have brains as well as beauty. It's in our nature."

"From wind farms in Cornwall to aero engines in Bristol, we have the right elements to power business. It's in our nature."

Each advertisement had the same website www.southwestengland.co.uk which is a portal to the tourism and business sites but different telephone numbers to call.

The focus on the natural environment does not run totally through its activities. Their easy to use and informative tourism website, www.visitsouthwest.co.uk does not use the *It's in our nature* strapline and focuses on ten themes which lead to their own microsites. These include 'Wide Open Spaces' and 'Relax and Recharge' and 'Adventure and Activities' which use the environment as the backdrop to experiences. These microsites provide both information on locations and providers (they appear to benefit from a good base of private sector suppliers) to encourage and facilitate booking.

Their nature microsite has various categories including wide-open spaces, geology, woodlands and forests, coastal, islands, wildlife, wetlands – which give the best examples from the region. A click on a site takes you to other sites eg English Nature and Wildlife Trust for more information.

Their use of the 'Dinosaur Coast' descriptor illustrates the way in which a natural asset can be turned into a popular attraction.

Scotland: Europe's Leading Wildlife Destination

There are a number of dimensions to the way Scotland uses the natural environment to promote itself. In terms of its general marketing it tends to work on the assumption that Scotland's brand awareness is built on the quality of its natural environment, so it uses strong and dramatic images allied to an emotional appeal of experiencing Scotland and a call to action to 'Live It'. By using TV, radio, press and posters Scotland has created a strong presence in the UK market place.

Scotland in the last two years has focused on a number of themes including a major effort on wildlife tourism. This has followed a sustained period of development of the product over the previous eight years; and the building of an infrastructure of provision ranging from dolphin watching to osprey hides, supported by the Tourism & Environment Forum (see more in Appendix 2) and the enterprise company networks. There are now over 300 businesses working in nature based tourism; 25 observation sites and CCTV viewing facilities and wild landscapes aplenty.

Scotland's **wildlife campaign** is targeted primarily at the UK market and involves direct mail; press advertising, specialist wildlife brochure and a dedicated website www.visitscotland.com/wildlife. Research has shown that the majority of responses (87%) to their campaign come from generalist interests rather than specialist – people who want to view wildlife as part of their holiday and not as the sole purpose. The success of the marketing is evidence in the new strapline and claim that Scotland is '*Europe's Leading Wildlife Destination*'. While it may or may not be justified it is a good illustration of claiming the 'territory' and fixing it in consumers' minds as true.

On **product development** many interesting initiatives have been supported. One such is the Making Tracks programme in the south of Scotland using Leader + European funding. This initiative has funded nine different partnership nature-based tourism projects (which covers wildlife and other natural environment based tourism) involving private businesses, public sector agencies and communities. Projects range from the Galloway Red Kite Trail; the creation of a new nature reserve with walks, hides, interpretation and picnic sports at Moffat; to Clifftop Discovery Tours offering conservation safari tours along the Berwickshire coast; to a salmon viewing centre on the River Ettrick. These projects contribute substantially to the infrastructure which makes marketing nature-based tourism a much more tangible offer.

Wild Scotland is a consortium of private sector operators who work together to share good practice; collaborate on marketing and product development and lobby for wildlife tourism. That the industry in Scotland can sustain such a venture shows how robust it now is.

The **Forest Tourism Initiative** newly funded by the Forestry Commission and VisitScotland is another example of new project aimed at developing and marketing the forest estate for tourism. Focus for this year has been on developing gentle and extreme cycling routes and activity; and promotion to private sector operators and others about the resource the forests offer for them to make use of in their product offer.

7.4 Conclusion

The natural environment of the Northwest is not used to promote the region or sub-regions of it in a strong, single-minded proposition. Its scenic qualities tend to be used as a backdrop to relaxing breaks or activities. Whilst it is easier to promote these tangible products, the benefits which other destinations, including Scotland, New Zealand and the South West region of England have got from using their environment as the core of their offer have not been exploited by the Northwest of England.

8. Market Analysis

In looking at the market potential for the natural environment of the Northwest we looked firstly at the trends influencing holiday-taking behaviour, lifestyles and behaviour. Secondly we identified the current profile of staying and day visitors to the Northwest, where it was not possible to extract information on visits based around the natural environment. We then examined in depth the major research exercise

undertaken by VisitBritain to segment the UK population (TEAM are licensed users of the Arkenford leisure database) and from this identified those segments with most potential.

8.1 Trends

An analysis of trends in lifestyles, lifestages, attitudes, holiday-taking and leisure patterns reveal that a number of trends fit well with a focus on the natural environment or suggest opportunities for how it might be used.

- The desire to escape and get away from it all is a key motivator for holidays and short breaks. For most peoples every day life takes place in busy urban environments, therefore the desire to get away from it all is well symbolised by beautiful and tranquil natural environments and for many is best delivered by it too.
- The levels of stress that people feel they are under is one of the features of modern-day living. Again the natural environment offers the antidote to stress – even if only for a short time.
- There is an increasing awareness in things green – from recycling to global warming the green agenda surrounds us. And while very often at the point of purchase price is a stronger influence than green-ness, there is no doubt that visiting an unspoiled natural environment is a more potent way to experience the benefits of green-ness than recycling wine bottles.
- Whatever shade of green a consumer pursues there is little doubt that the natural environment is considered to be ‘a very good thing’ and any area which can lay a claim to it, is imbued with that positive aura.
- We are increasingly concerned about our health and our well-being. We are living longer and are generally more fit, healthy and active. The notion of the ‘green gym’ where one can exercise somewhere other than the local gym is one with appeal.
- The interest in the natural environment evidenced by recent programmes like ‘Coast’ and ‘Picture of Britain’.

At the more niche end of things are some trends which offer interesting opportunities for the natural environment:

- The first is the interest in extreme activities. While more people talk about them than actually do them, they have become a symbol of excitement and risk-taking that can convert an apparently ‘dull’ natural environment into something adventurous and of the moment.
- We are in the midst of the ‘golden generation’. These are people currently in their late 40s, 50s and early 60s who have a life expectancy well into their late 70s and 80s. They have the prospect of enjoying it because they can retire by the time they are 60 (sometimes well before) on very good pensions, and have benefited hugely from their own and their parents’ increase in house prices. While this is not sustainable for our society, for the golden generation, and those selling products and services to them, they are a wonderful opportunity. High disposable incomes, frequent holidays and an interest in the natural environment make them a prime market.
- As urban living and stress takes its toll there are those who are looking for more time to spend with their partners and themselves; those looking for ‘reconnection’ and ‘finding themselves’. The natural environment provides the ideal location. Equally there are those who choose to indulge and pamper themselves as the antidote – again the natural environment is a powerful symbol of these, even if

we are talking about a luxurious spa resort in a beautiful landscape rather than about hiking through the landscape itself.

8.2 Current market

The Northwest currently receives 8.2 million holiday trips each year¹. 95% of these are from within the UK. Analysis of the domestic holiday makers to the Northwest as a whole shows the following:

- They spend £1.5 billion
- 24% originate from within the NW
- Two-thirds of visitors are within social groupings ABC1
- Two-thirds are under 54 years old
- Their average spend £177 per trip
- Their average length of stay is 3.37 nights

(Source United Kingdom Passenger Survey 2004)

The 195M trips to the Northwest's countryside by day visitors are also important in considering opportunities for the natural environment:

- 98% are from within the Northwest
- 90% of trips come within a 20 mile radius
- 68% of visitors are in social groups ABC1
- 73% have no children
- Average age 47.5 yrs
- 35% are alone, 30% in a couple
- They spend c. £8 (2005 prices) per trip
- The main attractions are walking and sports and eating out

(Source: GB Leisure Day Visits Survey 2002-2003)

8.3 Potential Markets

We believe the best opportunity lies within the domestic market for short breaks and day visits. The domestic market is easier and more cost effective to reach and convert, and activity within the UK will have the added benefit of enhancing the image of the region contributing to other sectors and inward investment. We further believe the best opportunity will be in the ABC1 social groups and the empty-nester life-stage. This means disposable incomes are high; the appeal of the natural environment is greatest and this group have more time to research and plan; and are without children. (This is not to say that families will not be interested in the natural environment. Research shows however that the majority of families look to be 'entertained' on breaks and holidays. The natural environment in the form of Centre Parks is much more attractive for most families than the 'real' thing. Currently the type of structured activities and managed provision aimed at entertaining families is not yet as well-developed in the Northwest as it needs to be to have substantial appeal to families).

¹ Sources used are United Kingdom Tourism Survey and GB Leisure Visits Survey. At regional and area level STEAM (Scarborough Tourism Economic Assessment Model) is frequently used. The 2004 figures will be released shortly and will be an alternative source of data.

There will however be opportunities arising within some overseas markets through England's North Country (a consortium supported by the regional development agencies in North West, North East and Yorkshire which promotes those areas in international markets – see www.visitenc.com), where the natural environment can be used as the leading offer. The Dutch and German markets offer most potential having a greater interest in experiencing and enjoying the natural environment.

VisitBritain has carried out a major segmentation exercise within the UK market. They commissioned quantitative research from Arkenford Market Modelling and Research to identify segments according to lifestyles, attitudes, perceptions and behaviour. From this the UK population was divided into eight segments. Detailed analysis has been done to provide:

- in-depth understanding of each customer group
- buyers' profiles and spending patterns
- interest in various types of holiday, short breaks, days out and activities
- brand preferences
- media use and booking behaviours, and
- competitive destination sets

VisitBritain have undertaken further quantitative and qualitative research through the research company, Taylor Nelson Sofres, using these segments, as well as more traditional life-stage segments. This research has identified key strengths and opportunities for the English holiday product.

We have used this data to explore where the best potential for marketing the natural environment lies, and have identified two priority segments – the Cosmopolitans and the Traditionals. This is based on their attractiveness as target markets in terms of spend; their propensity to take short breaks; the appeal of the natural environment to them and the ease of converting their interest to action. A detailed profile of these segments is contained in Appendix 1.

The Traditionals are the safer option and probably the easier to convert in the short term. However the Cosmopolitans are the spenders and the opinion formers, and well worth targeting with a new offer from the Northwest. Within both segments we recommend targeting empty-nesters on the basis of our trend analysis. Empty nester interest in natural environment products is also supported by the MORI qualitative research undertaken for NWDA in autumn 2005.

Cosmopolitans are strong, active and confident. Style & brand is important, but as an expression of their self made identity. They are high spenders and look for new challenges and new experiences. Traditionals are self reliant and internally referenced. They are slow to adopt new options and have a strong orientation towards traditional values. They value individual attention & service.

A comparison between the segments shows:

	Cosmopolitans	Traditionals
No. weekend breaks pa	1.46	1.17
No. short breaks pa	0.7	0.47
% of visitors on short breaks	21%	13%
% of visitors on weekend breaks	21%	15%

Spend per day (2005 prices)	£63	£47
Price sensitivity	Relatively higher	Relatively lower

8.4 Product strengths and opportunities

Research among our segments shows a range of factors as important to the decision and enjoyment

Cosmopolitans	Traditionals	Empty Nesters (across all segments)
Strengths of England <ul style="list-style-type: none"> unspoilt countryside chance to visit several locations interesting villages and market towns 	Strengths <ul style="list-style-type: none"> unspoilt countryside beaches and coastline facilities for walking and cycling 	Strengths <ul style="list-style-type: none"> unspoilt countryside beaches and coastline facilities for walking and rambling interesting villages, towns and locations to visit
Priorities in making decisions <ul style="list-style-type: none"> chance to see wildlife in natural habitat beaches and coastline range of local produce and crafts 	Priorities <ul style="list-style-type: none"> chance to see wildlife in natural habitat quality food and dining in restaurants 	Priorities <ul style="list-style-type: none"> chance to see wildlife in natural habitat quality food and dining in restaurants range local produce and crafts
	Hidden opportunities <ul style="list-style-type: none"> Chance for self-improvement 	

Unspoilt countryside is a fundamental but what comes out clearly is the opportunity that lies around **beaches & coastline** and the chance to see **wildlife in its natural habitat**. This research also shows the importance of the infrastructure to holidays and breaks – good food, facilities for walking, interesting villages. All of these will be important to the overall experience which may still focus on the natural environment.

8.5 Conclusion

There are two priority segments with the potential for delivering new business to the Northwest – these are empty nesters within the Cosmopolitans and Traditionals segments. The particular product opportunities are around beaches and coastline and wildlife viewing.

In promoting the natural environment of the Northwest we must be very clear about the product offer. Currently, the natural environment tends to be used as a backdrop to admire or a place to carry out recreational activities.

Even countries where one might expect the natural environment to be used as a core proposition do not deliver this, as the following Tourist Board statements demonstrate:

- *Relax by a peaceful mountain lake or be active and hike or mountain bike through the landscape.* (Tirol Tourist Board)
- *Whether you're seeking a lively metropolis, breathtaking landscapes or cultural heritage Sweden offers a wealth of inspiration.* (Swedish Tourist Board)
- *Its unspoilt natural environment is the perfect setting for all kinds of activity, whether you are seeking excitement or relaxation.* (Finnish Tourist Board)

All of these are interchangeable and could apply to the Northwest as well as Wales, Scotland, Yorkshire or Northumberland.

If we are to make the most of the natural environment we need to bring it to the front of the proposition and not have it sitting as the backdrop. However it is also important that the proposition must integrate the natural environment experience with the other elements of a break – good food, good accommodation, attractive villages, visiting historic sites.

9. Other Sectors

While tourism is the lead sector to benefit from the natural environment, we considered what direct or indirect benefit there might be to other sectors from a more explicit link with the natural environment or as a spin-off from tourism marketing.

9.1 Image and Quality of Life

The natural environment has a big role to play in the image of an area and in both the perceived and actual quality of life. The countryside and the Lake District (as well as friendly people) are cited as the key strengths by both those living inside and outside the region (MORI 2003 report for NWDA). But only 7% of UK residents and 13% of Northwest residents cite nice/pretty countryside when asked to mention the immediate things they think about the Northwest. Yet a very large percentage of the Northwest's population live within 45 minutes drive of either the Peak District, Yorkshire Dales or Lake District National Parks or of fine undeveloped coastline.

The qualitative research carried out by MORI this year suggests that perceptions of the Northwest, particularly by those who have never been, are that it is slightly grim and industrial, although reactions to the locations and brands of the Northwest is much more positive. This suggests that explicit links need to be between the destinations and the region as a whole to challenge and change perceptions.

9.2 Inward Investment

Attracting inward investment is a key plank of the economic development of the Northwest. Between 2000 and 2004 the North West attracted 273 inward investment projects creating 23,559 jobs. While the natural environment of the region has a role to play in this, it is not a key driver of decisions. The primary factors, depending on the specific business, are:

- Funding support available
- Premises
- Local labour market
- Transport connections

The quality of life in an area will however have a role to play, and other things being largely equal, may be the decisive factor. The aspects influencing quality of life will include many factors from housing and schools to the natural environment. Thus it is not possible to say the extent to which it will influence, only that it will.

A greater, but equally difficult to specify, role is the one the natural environment plays in influencing or changing perceptions of an area. The picture many outside the Northwest have of it is one of a post-industrial area in decline. The resurgence of Manchester and Liverpool has certainly challenged that, but the image remains a largely urban one. Presentation of the Northwest as an area with an outstanding natural environment will enhance the image of the region as a whole. A combination of a thriving urban location to provide labour, housing and culture with a close proximity to some of the best natural resources in Britain is a potentially compelling one. Skilled labour force and transport links are key factors of success by a long way, as quoted by UK opinion formers in the MORI 2003 research undertaken by NWDA, but amenities, leisure facilities (and eating) ranked third.

The image of a high quality natural environment is also good shorthand for showing how the region has changed and what it can offer, without having to explain in so many words. The MORI research undertaken by businesses within and outside the region showed that businesses who felt that the region has improved as a place to do businesses are most likely to cite the improvements in general morale and quality of life in the region. The natural environment contributes to this.

9.3 Food

"Most research suggests that environmental attributes in food possess 'luxury' rather than 'necessity' qualities. In this respect, the fundamental requirements of taste, quality and appearance followed by health and safety attributes were greater influences over consumer purchasing habits than 'environmental' attributes".
(Environmental Marketing: A Collaborative Approach produced by English Nature and EFPF p27).

The environment has greatest role to play not in mass produced and consumed products but locally produced (and often consumed) ones where provenance is important. The most important of these and the one which will benefit most from promotion of the natural environment is locally produced food. There is an increasing interest in the provenance of food, although within the premium sector. This can be seen in supermarkets selling meat from named farms to restaurants which use local produce and give details of their local suppliers.

The promotion of food which is based on its provenance is very closely related to the environment in which it is produced. The development of Northwest Fantastic Foods and the various 'Made In' sub-regional programmes have used their environments to good effect in their promotional activities. It is code for quality. 'Fell-Reared Lamb' instantly conveys an image of a high quality, clean environment which will produce good-tasting meat from animals who have been well looked after.

The provision of locally produced food in Northwest restaurants will enhance the offer to visitors as well as reinforcing the quality natural environment positioning for tourism. Authenticity is important in both food and tourism. Work is underway by North West Fantastic Foods to introduce and support the use of local food in hotels and restaurants. This includes the production of a tool kit to make it easy for hotels and other food providers to source local produce and promote it on their menus. The promotion of the natural environment of the Northwest and the promotion of quality food produced in the Northwest will be mutually reinforcing. Both will also benefit all those involved in the supply chain of food production including agriculture, processors and retailers. 20% of the fresh produce sold by Booth supermarkets in the Northwest is locally sourced. What is more Booths are opening a new restaurant in Kendal fitted out with customised locally produced fittings using natural materials.

The link with agriculture is particularly important and the contribution promotion of the natural environment can make to tourism and food production will be of direct benefit to this fragile sector.

9.4 Crafts

We believe promotion of the natural environment has a limited contribution to make to locally produced crafts. This is not to say that having a good range of such crafts does not enhance the tourism offer – it does. Craft shops and galleries add considerably to the retail offer and provide a sense of place and differentiation which is valuable in an increasingly globalised world.

Made In Cumbria incorporates crafts, and Made in Lancashire and Cheshire are moving in this direction which will undoubtedly benefit local crafts. It is harder to see the role the natural environment can play in this, except perhaps in depictions of it in promotional activity.

9.5 Other sectors

There is no evidence to suggest that the natural environment has a significant role to play in the perceptions or promotion of other sectors although there may be a degree of halo effect.

9.6 Conclusion

Promoting the natural environment of the Northwest will have a wider benefit to the food sector and to inward investment efforts; as well as to the sense of local pride of residents.

10. Conclusions

Our research demonstrates that the natural environment offers a substantial opportunity to differentiate the Northwest and grow tourism by using the natural environment as a focused proposition and illustrating various themes and experiences within it. The growth opportunity lies in short breaks visits with specific segments of empty-nester Cosmopolitans and empty-nester Traditionals within the UK market.

This promotional activity will enhance the image and perceptions of the Northwest to the benefit of the general visitor appeal of the region, inward investment, and residents' appreciation of their quality of life. It will also contribute to businesses in the supply chain for locally produced food.

Growth in visitor numbers will also support enhancing and conserving the natural assets of the region, when allied with sympathetic visitor and resource management.

We have considered whether the marketing opportunity extends to the Northwest positioning itself solely on 'the best natural environment in England'. This approach would involve making a major investment in awareness campaigns and running this positioning through all marketing activity. While the diversity and quality of the natural assets of the Northwest justify the claim and there are advantages in investing in a single-minded proposition, we believe at this stage such a move is premature. Firstly, current perceptions of the Northwest are too far away from this proposition to make it believable; secondly the Northwest has three strong city offers in Manchester, Liverpool and Chester; thirdly while the natural assets may be exceptional, the visitor infrastructure is not. Investment is needed in improved environmental and heritage interpretation and in developing products and services around the natural environment (eg guided walks and activities, viewing locations for wildlife, themed trails, events and festivals etc.) provided by both private and public sector. The 'packaging' of the natural environment is a useful way to provide attractive hooks for potential visitors. Events and festivals based around the natural environment are good ways to bring together product providers with individual site owners and managers to produce a critical mass of product which can be promoted. The emergence of walking festivals is a very obvious sign of this (see www.walkingontheweb.co.uk and www.walkingpages.co.uk for details of walking festivals in Britain including a number in the Northwest). Alternatively an event such as the Kendal Mountain Festival gives the chance to present the natural environment and give reasons to visit at particular times. There may well be opportunities to build on existing events and festivals and promote these more effectively or indeed link together different events to create something larger. Equally there may be opportunities to develop new events e.g. based around the arrival of the ospreys, the birth of the chicks or the arrival of migrant birds. Bird festivals are common in North America and to a lesser extent in Europe. The Somme Bird Festival (www.festivaloiseau.asso.fr) has documentary films, exhibitions, guided walks, activities for children, photography and film competitions. Such events could offer a vehicle to profile the Northwest's environment where there is market interest but not, as yet, much competition. Food festivals too, could be developed to offer access to the natural environment in a way which is entirely consistent with the subject matter. Such opportunities should emerge from local collaboration of site managers/owners and event organisers.

Realising the current potential of the natural environment, let alone developing that potential, will not happen without comprehensive action being taken. The next section gives our recommendations on achieving the potential. One constraint on our recommendations is the imminent restructuring of English Nature, the Rural Development Service and the Countryside Agency into Natural England in 2006. While we believe many of our recommendations will be within the remit of Natural England – and have said this where appropriate - it will be difficult to get a firm response in advance of its setting up.

11. Recommendations

We have identified 18 recommendations to realise the opportunity presented by the natural environment of the Northwest. These are categorised into three –

- Marketing,
- Product development
- Collaboration

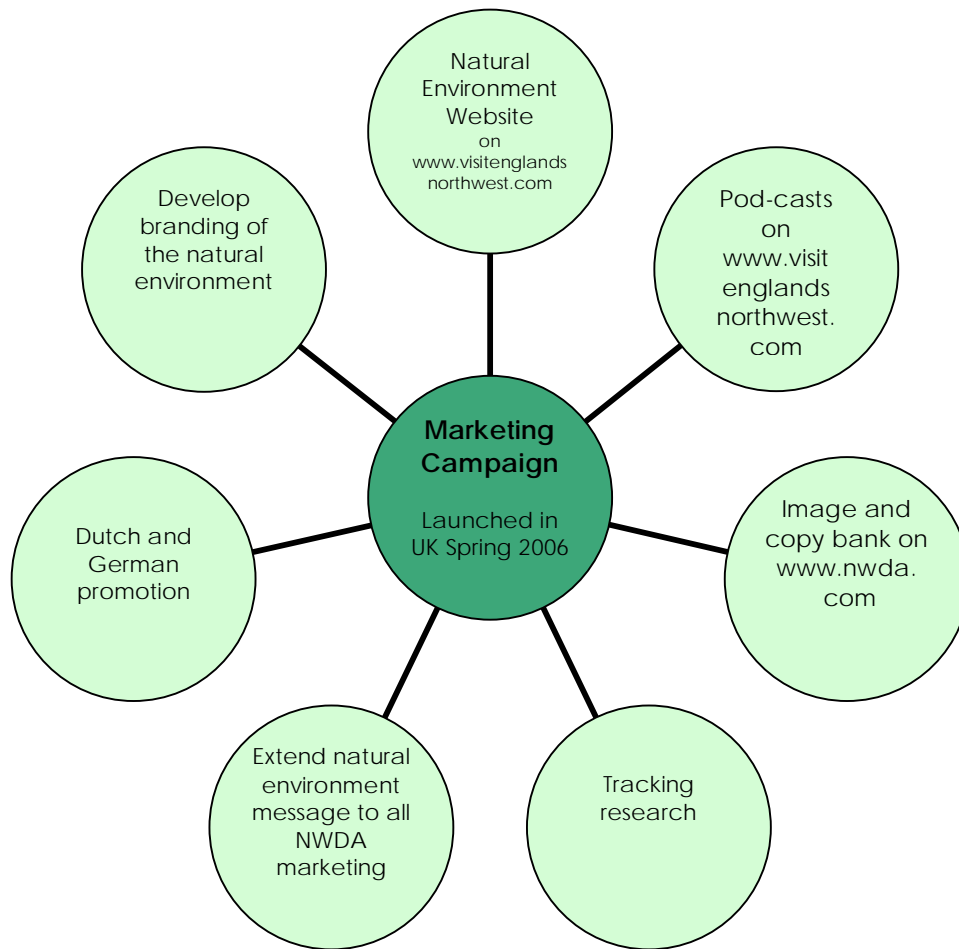
and each is dealt with in turn. A diagrammatic overview is given at the beginning of each section with an indication of dependencies and suggested timescale for delivery. While we deal with each category separately we believe that the recommendations reinforce each other. It will not be possible to sustain the marketing without adequate development of the product. Equally the product development will be hard to achieve without the effective collaboration among the organisations concerned with tourism and the natural environment.

The recommendations are over the short/medium term, i.e. over 3 years, as we believe it will need sustained action over this timeframe to make an impact. These first three years should be viewed as building the foundation of what will be needed to develop tourism in the natural environment of the Northwest. An evaluation should then take place to guide future investment.

Main Actions	Supporting Actions	By when	By whom
Marketing			
1. Natural Environment Marketing UK campaign		Launch Spring 2006	NWDA
	1.1 Develop branding	Spring 2006	NWDA
	1.2 Website	Spring 2006	NWDA
	1.3 Pod-casts on website	Spring 2006	NWDA
	1.4 Image and copy bank	Autumn 2006	NWDA
	1.5 Dutch and German promotion	Spring 2006 onwards	NWDA
	1.6 Extension of natural environment message through NWDA marketing	Spring 2006 onwards	NWDA
	1.7 Tracking research	2005 baseline and bi-annually	NWDA
Product Development			
2. Establish interpretation challenge fund		End 2006	NWDA and Natural England/English Nature
	2.1 Identify sources for challenge fund	Summer 2006	
	2.2 Identify existing funding sources for product development	Summer 2006	NWDA and Natural England/English Nature
3. Tourist Board action at sub-regional level		Spring 2006 onwards	Tourist Boards
4. Private sector		Summer	Tourist Boards,

development support		2006 onwards	Product Development Manager, Business Support Agencies
	5. Project checklist criteria produced and publicised	Summer 2006	NWDA and English Nature
6. Identify opportunities to extend Tourism & Conservation Partnership		Summer 2006	NWDA and Tourism Conservation Partnership
Collaboration			
7. Establish Natural Tourism Initiative		Winter 2006	NWDA and Natural England/English Nature
	7.1 Identify funding and location for Product Development Manager	Autumn 2006	NWDA and Natural England/English Nature
	7.2 Identify and establish Programme Budget	Autumn 2006	NWDA and Natural England/English Nature
8. Establish Regional Natural Tourism Forum		Summer 2006	NWDA and Natural England/English Nature
9. Marketing collaboration among natural asset owners		Summer 2006 onwards	Asset owners, Tourist Boards, Natural Tourism Product Development Manager
Evaluation			
10. Evaluation programme		Autumn 2008	NWDA

11.1 Marketing



1. Launch a **marketing campaign** targeted at Cosmopolitans and Traditionals within the UK promoting the natural assets of the Northwest. The campaign should include a campaign targeting Northwest residents to encourage day visits – this should be aimed at developing an appreciation of both a quality of life/pride in what we have as well as encouraging activity and spend within the region.

Tactics should include:

- Newspaper supplements
- Press advertising using strong images (contribution to image and tourism) of natural environment.
- Direct mail.
- E-mail campaign
- PR
- Promotions
- Sponsorship
- Cross promotion of sites

Delivered by NWDA.

- 1.1 Develop **branding** for the marketing of the Northwest's natural environment should substantiate the implicit claim that the Northwest has (some of) the best natural environment in England. This branding should run through all marketing activity and be promoted to others to use (in particular Tourist Boards/natural asset owners/'Made in...' activity). Delivered by **NWDA**.
- 1.2 Build on the data and maps we have produced on the natural environment into the regional Destination Management System and produce a dedicated **microsite** on www.visitenglandnorthwest.com which profiles the natural environment of the Northwest. It should be high quality; written in consumer friendly style; easily searchable; have strong images etc., and should be refreshed and updated regularly. This could then be accessed through the Destination Management System by all the Tourist Board web sites.

The site should incorporate added value components highlighting for example:

- Top places to go and see within each classification
- 'Packaging' with other elements e.g. local pubs, attractive villages, interesting/quality places to stay, rural crafts
- A 'if you liked this, you'll also like....' to drive business elsewhere in the region to lesser known sites
- Provide thematic trails eg coastal highlights, wildlife, scenic spots etc
- Information about private operators eg walking guides; safaris, eco-tourism providers etc.

Delivered by **NWDA**.

- 1.3 Produce **pod-casts** to sit on the website and be downloadable onto MP3 players. Initially these should focus on the Top 3 sites in each classification which we have described in the audit appendix, but should be extended to cover all the prime sites. As trails are developed supporting pod-casts should mirror these.

As well as information about the site itself the pod-cast could give suggestions for visiting other nearby environmental attractions, and indeed other components of a trip such as good pubs serving locally produced home-made food or interesting craft shops etc. The availability of pod-casts should underpin the marketing activity in action point 4. It will be of particular relevance and interest to the Cosmopolitans who are early adopters of technology.

Pod-cast technology is moving quickly and there is considerable advantage in being first in the market with a quality product. This suggests this action should be taken forward as soon as possible.

Delivered by **NWDA** and **English Nature/Natural England**.

- 1.4 Working through England's North Country opportunities using the natural environment should be promoted to the **Dutch and German** markets.

Delivered by **NWDA and England's North Country**.

- 1.5 **Image bank** with still and moving images (wildlife; panoramic sweeps etc) and a **copy bank** available for download and use by others in their promotion should be provided on www.nwda.co.uk and Tourist Board trade web sites. Existing images should be sourced from natural asset owners and managers and any gaps subsequently filled. This resource should be well publicised. Delivered by **NWDA**.
- 1.6 **Extension of the natural environment message** through all other marketing activity run by NWDA to contribute to image/perceptions agenda and to lay the foundations for the 'best environment' claim. Delivered by **NWDA**.
- 1.7 Implement **tracking research** to monitor changes in consumer perceptions of the natural environment offering of the Northwest. Delivered by **NWDA**.

11.2 Product Development



2. Establish a 3 year **challenge fund for interpretation**. Capital grants should be available for the following activities:

The preparation of **interpretation plans** for sites of regional significance for their natural assets and where visitors could be attracted in

significant numbers. Such plans should detail the capital and revenue budgets required to enhance the interpretation and presentation of sites. They should include outline designs of buildings, displays and events and how they would be promoted. The sustainability of facilities and services should be addressed.

The production and installation of **interpretation and communications materials** such as on-site boards, trails, artworks, guidebooks etc.

Enhanced physical access and visitor infrastructure which assists visitors to appreciate and understand the natural assets at key sites - such as trails, boardwalks, hides, viewpoints, rides etc. Provision of facilities that provide access for all should be included.

The development of new **displays and audio visual materials** for existing centres.

The use of **current radio, telephone and camera technology** to bring images of the natural environment into buildings, to mobile phones and MP3 players.

The detailed design and planning of **modern visitor centres** (the capital cost of the buildings and tourist infrastructure would be funded from other sources).

Major events which promote the natural assets of the Northwest and attract visitor spend, as well as encourage greater understanding and appreciation of the natural environment.

The fund should be available to public sector, voluntary bodies, trusts, private businesses and consortia, who can demonstrate their competence and commitment to the maintenance of high quality interpretation services. It should be limited to sites of regional significance where visitor numbers are likely to exceed 40,000 p.a and where economic, environmental and educational benefits can be demonstrated.

We suggest grants should be for 75% of the total costs with a twice yearly deadline for applications and a total regional budget of £2M p.a. Project grants should be between £10,000 and £250,000.

Funded and administered by **Natural England** and **NWDA**.

- 2.1 The first stage in establishing the Interpretation Challenge Fund is to explore and identify funding sources which could be drawn on.
Delivered by **NWDA and English Nature**.
- 2.2 Identify existing funding sources for product development of natural tourism products, packages and infrastructure, including in particular the Heritage Lottery Fund. Publicise this widely. Delivered by **NWDA and English Nature/Natural England**
3. **Tourist Board** support will be essential to deliver and develop action at the sub-regional level. Activity should include:
 - Addressing the development and promotion of the natural environment within their Destination Management Plans.

- Consider how the natural environment can be positioned within their own marketing and marketing collateral
 - Bring together a sub-regional Natural Tourism forum for their area involving local natural assets owners and private sector operators to encourage product development and better marketing. Upskilling needed
 - Advise private sector businesses on developing natural tourism products and packages and signposting them to appropriate funding
4. **Private sector development** – a far greater private sector provision is required to develop tourism in the natural environment. This includes specialist providers offering everything from guided walks to whale watching trips to understanding the geology of the region. It also includes rural accommodation providers setting up the likes of CCTV of wildlife in their farms and beaming it back to their self-catering cottages and ‘franchising’ it to local tea-rooms; or businesses within an area working together to develop a walking trail of all the natural environment sights and highlights in their community. Measures including business support and advice and identification of small project funding sources (see also recommendation 9) should be taken to support private sector development.

Supported by **Tourist Boards, Natural Tourism Product Development Manager, local business support mechanisms and local funding sources** and delivered by **private businesses**.

5. **Project Criteria Checklist** should be used in decisions about funding for natural environmental tourism projects through, for example, Objective 2 funding, which should include (nb not all criteria would necessarily apply to all projects):

Market Research

Research on present or prospective visitors/users has been conducted
A potential visitor market should be clearly demonstrated
The project is targeted at defined markets

Economic Impact

The project will directly or indirectly encourage new spending
Locally based businesses are likely to benefit
Direct jobs may be created
The project may lengthen visitor stay at the site/area

Environmental Impact

The natural resources will not be damaged
Any identifiable capacity of the site will not be exceeded
There is some system in place for monitoring impacts
Appropriate visitor management systems are in place (e.g. rangers or guides)
The site meets safety criteria
The project will contribute positively to environmental objectives

Educational and Social (where appropriate for some projects)

There are clear educational objectives
An interpretation plan has been prepared
There will be qualified staff
There are facilities and services suitable for defined educational markets
Local volunteers can be involved
Access for all is considered

Promotion

There is a marketing and promotion plan
There are identified resources for promotion
Promotional methods have been identified

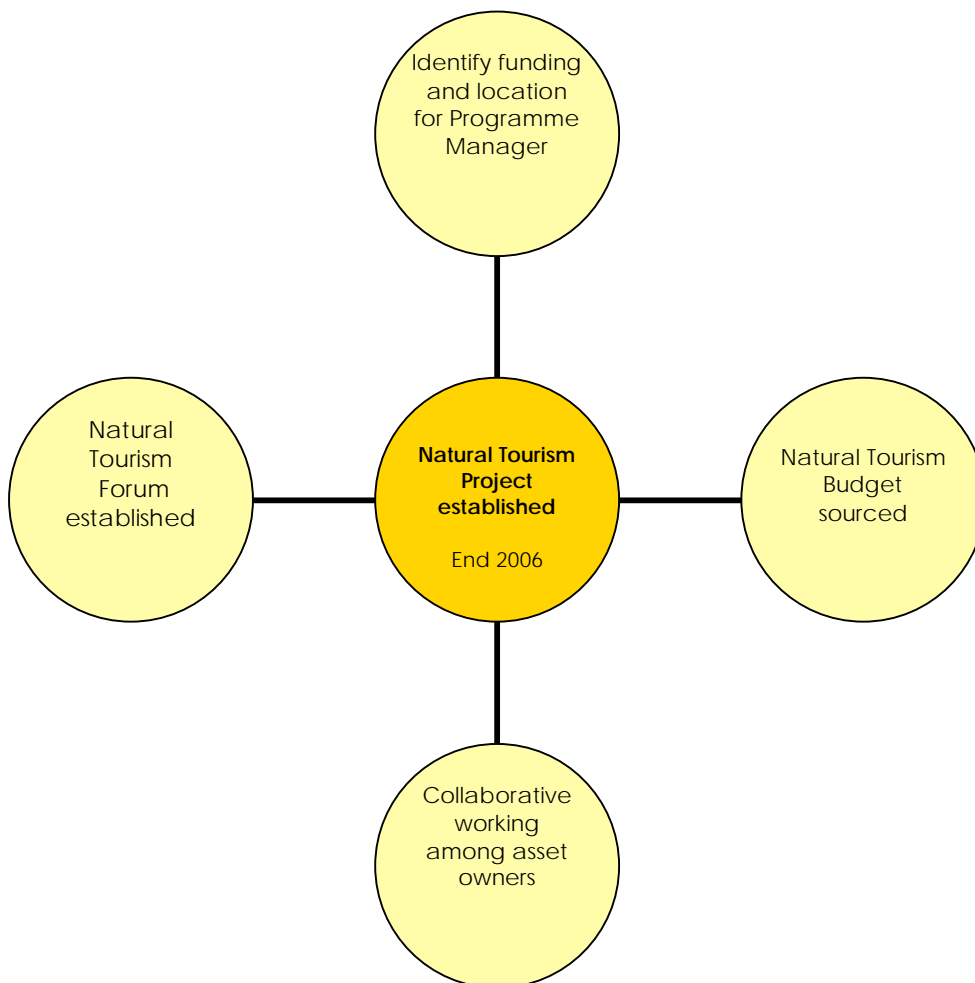
Evaluation

There is a method for evaluating the success of the project in economic, environmental and educational terms
The method of monitoring performance is simple and realistic
Partnerships & Community involvement.

Delivered by **NWDA and English Nature**

6. As part of developing the product we recommend investigating opportunities to extend **visitor payback** schemes using the Tourism Conservation Partnership to other areas – firstly Lancashire (Years 1 and 2) and then Cheshire (Year 3). This could both contribute funding for product development and reinforce the Northwest’s commitment to the natural environment in the eyes of visitors. Supported by **NWDA** and delivered by **Tourism Conservation Partnership**.

11.3 Collaboration



7. Establish **Natural Tourism Initiative** to take develop tourism based on the natural environment forward working with stakeholders and the private sector.

Delivered by **NWDA and English Nature/Natural England**.

7.1 Appoint a dedicate resource – a ‘Natural Tourism’ **Product Development Manager** located within Natural England or NWDA whose role is:

- Act as an advocate for tourism and the natural environment
- Identify and disseminate good practice and new ideas from within and outside the region
- Improve marketing capacity among natural assets owners
- Improve marketing and business capacity and collaboration among private sector businesses operating within tourism & environment sector

Funded by **Natural England and/or NWDA** and located within one or other.

7.2 Provide a dedicated **programme budget** of £30,000 pa for this work. Funded by **Natural England** and **NWDA**.

8. Establish a **Regional Natural Tourism Forum** which brings together **regional level interests** in natural environment and tourism ie

- NWDA tourism and tourism marketing
- English Nature/ Countryside Agency/Natural England
- National Trust
- Forestry Commission
- RSPB and WWT
- County Wildlife Trusts
- NorthWest Fantastic Foods
- United Utilities
- British Waterways Board

with a remit to oversee the work programme of the Natural Tourism Programme Manager, identify areas for collaboration among agencies and initiate appropriate action to take forward tourism in the natural environment within their agencies. This group should be a sub-group of the Natural Economy Steering Group.

9. **Collaborative working among asset owners/managers** across sites on marketing to pool resources and have greater impact. Areas for collaboration could include:

- Sharing customer information – to provide market intelligence and exchange of databases for direct promotion
- Joint promotion – special events, special offers, joint advertising, press trips, press promotions etc.
- Shared print
- Cross-promotion of sites in promotional print and websites, joint racking of print, and by site staff
- Development of events and festivals

Delivered by **site owners/managers (possibly facilitated by Tourist Boards)**.

11.4 Evaluation

10. During Year 3 undertake an evaluation of impact of the programme to date. Measures would include:

- Responses and conversion to marketing campaigns
- Shifts in consumer perception of the natural environment offer of the Northwest
- Research to test the credibility of the concept of the Northwest as 'the best natural environment in England'.
- The impact of regional and local collaboration
- The uptake, quality and impact of projects funded by the interpretation challenge fund
- The development of new ideas, approaches and marketing within the natural environment sector.
- The development of a stronger private sector provision of natural environmental tourism products and services such as guiding and interpretation, wildlife watching of all types, learning and educational breaks.

If merited, increase effort in Years 4-6 as follows.

11.5 Years 4 – 6

Marketing

- Develop a strong and single-minded positioning for the North West using the natural environment as the key differentiator to position the North West as 'England's best natural environment' (or 'England's natural environment at its best'?). This would contribute both to image and to tourism growth.
- Increase marketing spend to run major marketing campaigns based on this positioning.
- Work with Tourist Boards to develop their own natural environment brands consistent with the regional positioning and their own brands and activities.

Delivered by **NWDA**.

Product Development

- Extend the interpretation challenge fund for an additional 3 years.
- Implement a major 3 yrs investment programme in key visitor centres with state of the art interpretation. Delivered by **Natural England and NWDA**.
- Initiate and support range of 'green' schemes which reinforce positioning of England's natural environment.
- Consolidate and extend the Tourism & Conservation Partnership activity throughout the region.

Collaboration

- Review management and administrative arrangements and consider option of independent partnership unit.

- Expand the resources available to the Natural Tourism Programme.

12. Economic Benefit

It is difficult to definitively measure the result of implementation of our recommendations. Work has been done to assess the economic impact of the environmental economy and at site level eg Leighton Moss. It is problematic however to extrapolate in either direction and accurately assess the regional impact of the various measures we propose should be taken.

We have however demonstrated the market demand and potential. The target market within the UK amounts to 3.8M people within our priority segments of ABC1, empty-nester, Cosmopolitans and Traditionals. We know that Traditionals are spread throughout the UK and Cosmopolitans relatively concentrated in the south east. We know what messages will appeal to them and what product investment is needed to attract them.

It would be reasonable to postulate that, if the policies we recommend are implemented with commitment, backed by substantial investment, leisure tourism to and within the region might see an additional increase in value of 1-5% over a 3 year period, whilst day trips might increase by between 0.3-1%. This would give additional spend of between £20M and £90M.

If we apply a multiplier of 1.28² to reflect knock-on spending generated by this additional spend then the total impact will be between £25.6M and £115.2M.

The impact on jobs is equally hard to measure. Work we are currently engaged on in Devon using New Earnings Survey as a basis estimates £25,000 per job. If this is applied in this context then we might expect 1024 and 4608 to be created – this relates well to the job creation estimates made as part of the Economic and Regenerative Value of the Natural Environment of the Northwest study for NWDA and English Nature in 2003.

In rural areas, where underemployment is common, we would expect a greater percentage of jobs to be safeguarded and be better paid. In rural areas another important factor is the contribution spend will make to sustaining communities (local job opportunities, services, facilities, retailing, less poverty, local confidence etc) which will have significant social as well as economic benefit.

If a more robust measure of economic impact is required we recommend a specialist economic assessment is undertaken. We believe however there is enough evidence of market potential to warrant investment and so consider it would be more productive to build in economic impact measures into the evaluation that will take place in 2008 to establish what has actually happened. STEAM may be a good source of data, as would particular measures at specific sites (visitor numbers and spend, increases in revenue, direct jobs created etc.)

² Scottish Tourism Multiplier Study identifies the multiplier effects of new tourism spending taking account of impact on suppliers and the impact on local incomes for rural areas to be 1.32. For remote rural areas this is estimated to be 1.24. We have taken an average of 1.28 as the spend will be in a combination of rural and remote rural areas.

13. Brand Architecture

There are a number of brands and themes used in the promotion of the Northwest at the moment. In addition NWDA has commissioned work on tourism branding following the branding work done for the Northwest as a whole. This latter work produced a logo and guidelines for use in the presentation and promotion of any sector.

So where does the natural environment sit? Our view is that a strong position for the natural environment (which begins to lay claim to 'England's best natural environment') should be developed which has relevance across the region. This presentation should use the natural environment as the forefront rather than a beautiful backdrop. Specific products, experiences and activities can then be placed within the natural environment positioning for specific promotion. The Tourist Boards should be encouraged to use this branding for any activity which involves the promotion of their natural environment or themes and experiences within it.

For the first three years of activity this natural environment 'brand' will be in development and should sit alongside the attack brands and priority themes being promoted by NWDA and the Tourist Boards. For those attack brands and priority themes which are within the natural environment 'product range', the regional natural environment brand building should be used to underpin their promotion. The focus on the natural environment by the Northwest could also be used to support the renaissance of the Lake District brand as well as – for the first time – giving a profile to the lesser known natural assets of the region.

Following sustained investment in product development and marketing it may be possible to lay a stronger claim to the Northwest being England's best natural environment and for that to be believed. Research should be used to track this. On the basis of current trends and opportunity this would seem to give the Northwest the opportunity for unique differentiation rather than simply offering something for everyone.

14. Appendices

Appendix 1: Profile of Cosmopolitans and Traditionals segments

Appendix 2: Case Study of Interpreting the Natural Environment

Appendix 3: Case Study of the Tourism and Environment Forum Scotland

Appendix 4: List of Consultees

Appendix 5: List of Main Sources

Appendix 6: Natural Asset Maps and Data

Appendix 1: Profile of Cosmopolitans and Traditionals segments

Summary of Cosmopolitans

Very active holiday takers - 21.4% of the weekend market; 21.6% of the short break market making them the most active group.

Expressed preference for Scotland, Wales & Cornwall but not North England (or mid-England generally). In their top 20 only Lake District features at no.6 (lower than average of no.4)

15.2% of population

25% over 55 years

38% at post family lifestage

54% in ABC1 social grouping

Potential target market of up-market empty-nesters is 1.5M

Particular concentrations in West Midlands, South East and London. Only 6.4% live in Northwest.

Highest propensity for 4-7 night and weekend breaks

What is important to them in a break is:

- Beauty of the place
- Food & drink & accommodation
- Things to do
- Ease of getting there
- Peace & quiet
- Physical challenge/activity hols
- Visiting a special place
- Exploring new region
- Preference for empty beaches – not obvious beauty spots
- Activities
- Sailing/water sports
- Walking – short and long
- Extreme
- Health and fitness
- Bird watching & wildlife
- Field & nature studies
- Horse riding and trekking
- Mountaineering/caving
- Residential activity/hobby
- Arts festival/event

More likely than average to own a second home in UK or abroad

Media consumption:

- Daily - Sun/Mirror/Star/Telegraph/Express/Guardian/Independent
- Sunday – Mirror/Times/Telegraph/Observer/Independent
- Low TV viewing

Summary of Traditionals

12.2% of the weekend away market. More interested in English options than almost any other segment.

Relatively strong preference for short breaks - represent 12.7% of the short break markets and take more than 50% of their short breaks in England.

Prefer bargain breaks rather than last minute

Preference for all rural locations (except Devon & Dorset). Favourite destinations – Cornwall, Wales, Scotland. In their top 20 only Lake District features at no.9 (lower than average of no.4)

North England is relatively well rated among Traditionals

12.4% of population

53% over 55

71% post family

55% ABC1

Potential target market of up-market empty-nesters is 2.3M

Relatively high concentrations in West Midlands and Wales but pretty evenly spread – not well represented in London. 13.3% live in Northwest.

Things that are important:

- Beauty of the place
- Food & drink
- Peace & quiet
- Activity hols
- Preference for empty beaches - not obvious beauty spots
- Activities
- Sailing/water sports
- Walking – short and long
- Extreme sports
- Bird watching & wildlife (strong)
- Field and nature studies (strong)
- Horse riding and trekking
- Mountaineering/caving
- Residential activity/hobby
- Propensity to choose hols that minimise impact on environment
- Like intellectual challenges

More likely than average to own a second home in UK

Media consumption:

- Daily – Mail/Telegraph/Express/Times/Record
- Sunday – Times/Express/Observer/Independent/Mail
- High TV viewing

Appendix 2: Case study of interpreting the natural environment

PRESENTATION AND INTERPRETATION OF THE NATURAL ASSETS

How the natural assets of the region are presented and interpreted will play a significant role in realising their contribution. The Northwest clearly has a range of valuable natural assets, but their presentation and interpretation could be enhanced.

“Interpretation” is the art of explaining the meaning and significance of sites to the visiting public. It aims to aid enjoyment, understanding and influence attitudes in a way that is sympathetic to the conservation of natural resources. But significantly interpretation facilities and services are also tourism products that attract visitors and can be promoted. The objectives of interpretation combine economic, educational and visitor management aims.

Enhanced interpretation of landscapes, flora and fauna would have the following objectives:

- to provide new or improved visitor attractions based on the natural environment of the region
- to raise the profile of the natural assets of the region through the promotion of these attractions
- to provide a focus for communication with tourists and day trippers in a way that would increase their awareness of the natural assets of the area, or of the specific site they were visiting, and so enhancing their image of the region as a place to visit and to live
- to enhance the public’s enjoyment, so that they will spend longer on site and increase their spending
- to provide direct employment at the natural environment site, supported by increased visitor numbers and spend

A good example of how site interpretation of natural assets is of direct benefit to the economy, is the Wildfowl and Wetlands Trust. The Trust is concerned with creating habitats and presenting birds in a way that entertains and delights visitors. The WWT sites receive many thousands of paying visitors and the organisation now has an annual turnover of £11 million and employs 250 staff. WWT has 120,000 members and over 800,000 visitors to its 9 centres. Martin Mere in Lancashire receives around 140,000 visitors each year. Investment in a new centre at Barnes in London has attracted 150,000 visitors annually and employs 35 staff.

A second example from overseas can be seen in Alberta, Canada. With taxes from oil reserves, the Province established a fund for the development of heritage and arts resources. In the 1980s a number of large new visitor and interpretive centres were developed as the cornerstone of the development of tourism in the rural areas of the province. Sites such as “Head Smashed in Buffalo Jump” and the Tyrrell dinosaur museum at Drumheller were developed with major interpretive centres. Significant investment in museums/heritage centres based on the natural assets of the province was seen as key component of rural economic development. These developments contributed greatly to the tourism products of the province as well as providing important educational resources for the local population.

Present Interpretation of the Natural Assets of the Northwest Region

There is much small scale on site interpretation of the natural environment with small centres, leaflets, trails and interpretation boards. This is largely provided by local authorities, AONBs and National Park Services. Much of this is worthwhile educational provision and is appreciated by local schools and day trip visitors to countryside recreation sites, but it is not at a scale that makes any significant impact on the tourism economy or can be promoted as a target for tourists or large numbers of day visitors.

The number of sites in where the natural environment is presented and interpreted at a scale and quality that is of national significance are few. They are:

- Martin Mere - The Wildfowl and Wetlands Trust site in Lancashire
- Leighton Moss – the RSPB site in the Arnside-Silverdale AONB.
- Grizedale Forest – One of the original wildlife visitor centres developed by the Forestry Commission that has become a major attraction for visitors in the southern Lake District. This site is planned to have a £5M re-development scheme.
- Whinlatter Forest – a modern visitor centre in the Forestry Commission site in the northern Lake District.
- Brockhole – the Lake District National Park Centre on the shores of Lake Windermere, managed by the National Park Authority, but seeking alternative management options.
- Linmere Visitor Centre, Delamere Forest, managed by the Forestry Commission.
- Bowland Visitor Centre – Beacon Fell Country Park, managed by Lancashire County Council.

In addition the Natural Environment is interpreted in a number of city museums, most notably:

- The Liverpool City Museum
- The Manchester Museum
- Tullie House Museum, Carlisle

The linking of the natural history sections of these museums to outdoor sites and activities and trips is an opportunity to be exploited in taking forward the recommendations of this work. This will be best achieved through partnerships between the museums and the natural assets managers such as the National Trust, English Nature, RSPB etc.

Enhancing Interpretation of the Natural Assets

There is potential to invest in enhanced interpretation of the natural assets of the Northwest. This may best be achieved through support to those organisations that are experienced and committed to interpretation and education about the natural environment, such as:

- The Wildfowl and Wetlands Trust
- The RSPB
- The National Trust
- The Solway AONB Service
- The Arnside Silverdale AONB Service
- The Forest of Bowland AONB Service
- The Lake District National Park Authority

- The County Wildlife Trusts in Cumbria, Lancashire and Cheshire
- Particular local heritage and amenity societies and trusts

Techniques with potential for investment

Whilst it is not the intention of this strategy to go into the detail of how the natural assets could be better interpreted, experience from elsewhere would indicate that there are some approaches that have been shown to be particularly effective.

- The use of remote cameras with radio links to bring wildlife interest into visitor centres, museums and hides (eg The Scottish Seabird Centre at North Berwick)
- The use of pod-casting to provide interpretation for individuals on site (city guides)
- The use of local radio to provide information to car drivers in local areas (e.g. as provided by some American National Parks)
- The refurbishment of displays and audio visual provisions in existing or extended visitor centres with striking design and display techniques (e.g. the new geology museum in Edinburgh)
- Wildlife viewing and guiding with expert guides (eg Wild Scotland)
- The use of art and outdoor sculpture to capture the imagination of people about the natural environment (e.g. the Grizedale art trail)
- The use of newly commissioned films (e.g. as used in the recent BBC COAST series) for use in visitor centres and evening viewing by holidaymakers
- Striking architecture of new visitor provision (e.g. Eden Project, WWT centre at Barnes London)

Conclusion

An important way for the natural assets of the north-west to be better marketed and exploited for economic benefit will be from enhanced interpretation and presentation. It will be important for the NWDA and Natural England to allocate appropriate resources to these activities and for there to be clear understanding regarding the two agencies respective responsibilities in this area.

Appendix 3: Case Study of the Tourism and Environment Forum in Scotland

THE TOURISM AND ENVIRONMENT FORUM IN SCOTLAND

Tourism provides a strong link between economic development and the environment. It can often provide the major economic rationale for the protection and conservation of scenic and biologically valuable areas. Tourism and recreation can also generate visitor pay-back into the management of these areas and help rural communities. Rural tourism in particular thrives on a high quality natural and built environment. When the environment deteriorates, options for tourism also decline. Tourism and the environment are both interrelated and interdependent and together provide a sustainable economic base.

There is significant experience in Scotland with the utilisation of natural assets for the development and marketing of tourism. It could be said to be 10 years ahead of much practice in this field in England, partly because of the prominence of the natural environment in the heritage of Scotland. The Tourism and Environment Forum is one initiative which has relevance to the NW of England and is a useful model from which to learn.

The Tourism & Environment Forum in Scotland is a partnership of public and private organisations set up to promote sustainable tourism in Scotland. The Forum was established with the recognition that the environment is the Scottish tourism industry's main asset and they are working to ensure that both tourism and the environment are well managed.

Formed in 1994, the Forum is chaired by Tom Brock the director of the Scottish Seabird Centre. It is funded by VisitScotland, Scottish Natural Heritage, Scottish Enterprise and Highland and Islands Enterprise. The Tourism and Environment Forum is a multi-organisational partnership, comprising of a range of public, private and voluntary sector agencies. Its offices are in Inverness.

The Forum's mission is *to bring long term business and environmental benefits to the Scottish tourism industry through encouraging sustainable use of our world class natural and built heritage.*

Some of the main achievements of the Forum to date are:

- Working with businesses, the Forum established 'Wild Scotland', an association for Scottish wildlife and nature tourism operators.
- Leading the development of wildlife tourism sector, through production of market research, wildlife tourism conference and ensuring joined-up approach to range of nature-based tourism projects.
- Developed and implemented the Green Tourism Business Scheme for accommodation and visitor attractions, now one of the most successful Environmental Tourism schemes in Europe.
- Produced research and best practice on wildlife tourism, interpretive planning, marine wildlife watching, walking, cycle networks, and environmental management for tourism businesses.
- Promoted a positive environmental message through marketing, print and press/PR activities.
- Worked with the public and private sector to put environmental issues on the agenda of all the main bodies involved in tourism in Scotland.
- Initiated and supported a network of Tourism Management Programmes across Scotland and produced guidance on locally-driven sustainable tourism networks.

The Forum brings together a whole range of organisations in Scotland and is supported by:

Scottish Enterprise
Scottish Executive
Scottish Local Authority Economic Development Group
Scottish Rural Property & Business Association
Scottish Natural Heritage
Scottish Environment Link
Scottish Tourism Forum
Scottish Youth Hostels Association
Strathclyde University
SportScotland
VisitScotland
Council for Scottish Archaeology
Forestry Commission Scotland
Highland Council
Highlands & Islands Enterprise
Historic Scotland
Keep Scotland Beautiful
National Trust for Scotland
Royal Society for the Protection of Birds
Scottish Environmental Protection Agency

Review of the Forum

A review of the Forum was carried out in 2002 and confirmed its valuable role in creating activity and links between a range of public, private and voluntary organisations. An increase in budget was suggested at this time and the organisation has had three staff based in Inverness in recent years. It was originally established with two rather different aims, the one being to encourage the growth of tourism based on the environment and the other being to encourage an environmentally sound tourism industry. The former objective has largely been achieved and the organisation has increased its emphasis on "greening" the tourism industry in recent years.

The encouragement and coordination of the private sector in wildlife tourism has recently resulted in the establishment of a new "Wild Scotland" organisation (see www.wild-scotland.org.uk) and the remainder of the Forum is to be absorbed within Visit Scotland in the near future.

More about the Tourism and Environment Forum in Scotland can be seen at www.greentourism.org.uk.

Appendix 4: List of Consultees

Tourism and Marketing

Nick Brooks-Sykes	North West Development Agency
Peter Mearns	North West Development Agency
Katherine O'Connor	North West Development Agency
Barrie Kelly	Cheshire & Warrington Tourism Board
Stephanie Ainscough	Blackpool & Lancashire Tourist Board
Suzi Williams	Blackpool & Lancashire Tourist Board
Victoria Saide	Marketing Manchester
Ian Stephens	Cumbria Tourist Board
Richard Greenwood	Cumbria Tourist Board
Sheona Southern	Cumbria Tourist Board
Steve Connor	Mersey Partnership
Steve Fowler	Mersey Partnership

Environment/Natural Assets

Mark Atherton	North West Development Agency
Will Williams	English Nature
Steve Preston	English Nature
David Henshilwood	English Nature
Michelle Young	English Nature
Keith Jones	Forestry Commission
Steve Connor	Forestry Commission
Dave Lowe	Forestry Commission
Penny Knock	Forestry Commission
Liz Houseman	National Trust
Frances McGuire	RSPB
Tim Youngs	RSPB
Emma Dewhurst	Lake District National Park Authority
Sarah Peet	Environment Agency
Martin Moss	Countryside Agency
Judith Moore	Friends of the Lake District
Andrew Forsyth	Friends of the Lake District
Claire Mennim	Mersey Forest
Grant Luscombe	National Wildflower Centre & Landlife
Shea O'Neil	Weaver Valley Country Park
Ian Slater	English Heritage
Sarah Warrener	DEFRA
Carole Carroll	Mersey Waterfront
Adrian Banford	Cumbria Fells & Dales Leader +
Nigel Blandford	Red Rose Forest
Kirsty Martin	Government Office North West
John Thomson	Environment Agency
Jon Lovell	NW Regional Assembly
Kirsty Martin	Government Office NW
Helen Sweeney	Government Office NW
Ruth Prinold	Rural Development Services
Lucinda Antal	National Wildflower Centre

Other

Lorna Tyson	Northwest Fantastic Foods
Claire Stott	The Tourism & Conservation Partnership
Laurence Bresh	VisitBritain/England Marketing

Appendix 5: List of Main Sources

Marketing Review

Tourist Board websites
Tourist Board brochures
Tourist Board Destination Management Plans
Tourist Board Marketing Plans
NWDA Marketing Action Plan 2005/6
NWDA Strategic Marketing Framework

www.nwda.com

www.visitenglandsnorthwest.com

National Trust marketing plans
National Trust marketing brochures
Natural environment asset owners' websites and brochures

North West Fantastic Foods marketing collateral

Market Analysis

Arkenford Data Browser
MORI Perception of the Northwest 2003
MORI Qualitative Research for NWDA 2005
VisitBritain Marketing Opportunities and Prospectuses
Qualitative and Quantitative Market Research for VisitBritain by Taylor Nelson Sofres
Research for VisitScotland on nature based tourism by Taylor Nelson Sofres 2003

www.scotexchange.net

www.tourismtrade.org.uk

<http://www.greentourism.org.uk>

<http://www.greentourism.org.uk/nature>

www.visitbritain.org/ukindustry

United Kingdom Tourism Survey
International Passenger Survey
GB Leisure Day Visits Survey 2002/03

Future for Domestic Tourism; Henley Centre 2005
Tourism of Tomorrow: Sara Nordin, European Tourism Research Institute, 2005

Websites and marketing collateral from Costa Rica, New Zealand, Scotland and South West Tourist Board

Economic Analysis

Regional Economic Strategy 2003
Draft Regional Economic Strategy 2005
RES Economic Analysis 2005
RES Topic Paper on Inward Investment

Environmental Economy of the Northwest; Environmental Resources Management for NWDA, NWRA, GONW and Partners
Environmental Marketing: A Collaborative Approach; EFPF for English Nature 2004

The Tourism & Conservation Partnership Business Plan