

# Developing nature tourism in Greater Lincolnshire: summary

May 2016



This document summarises the nature tourism report produced in early 2016 by Leeds Beckett University for the Greater Lincolnshire Nature Partnership (GLNP). The full report can be found on the GLNP website: [www.glnp.org.uk](http://www.glnp.org.uk)

## 1. Introduction

The first chapter sets the context for the research and the report, which defines nature tourism as: “**tourism and day visitor activity where the primary or ancillary purpose is either to view wildlife in a natural setting or to engage with the natural environment in a purposive manner (including enjoying views of the natural landscape as well as observing habitats).**”

## 2. The existing nature tourism product

A brief overview of the study area confirms that Greater Lincolnshire’s nature tourism potential is supported by the presence of a wide variety of landscape types. This chapter also highlights a number of sites managed for visitors as well as for habitat and broader environmental protection purposes.

## 3. Who is the nature tourist in Greater Lincolnshire?

- Conventional academic thinking on segmenting nature tourism is as valid in Greater Lincolnshire as it is in other locations. There is a small, specialist market for specific species or for wildlife in general, and a broader and much larger market for the natural environment as a backdrop to other leisure activities.

- The current baseline level of engagement with the natural heritage of the area has been estimated at around **5.69 million holiday trips and day visits across the Greater Lincolnshire area.**
- **Around 90% of these 5.69 million trips are made by day visitors**, most of whom live within the study area. Spending by this sector helps to support local businesses and their associated services but is technically not additional input into the local economy.
- Of the 5.69 million day visits or holiday trips in Greater Lincolnshire that can be classified as containing an element of nature tourism, around 16% or 910,020 involve viewing wildlife as the primary activity. Therefore the vast majority comprise a more general engagement with the natural heritage of the area.
- Also of note is that total day visitors in Greater Lincolnshire outnumber tourists by a ratio of more than 6:1. The report recommends developing strategies to convert day visits into overnight stays to increase spending on accommodation, food and drink. Assuming strong local supply chains, this would also deliver benefit to the area’s agricultural and food producing community.
- In terms of staying tourists, the largest proportion (around 40%) stay in non-serviced accommodation (e.g. self-catering or caravans) and a further one-third stay with family and friends, leaving just over 25% staying in serviced accommodation. The report suggests several routes into these markets to be explored by GLNP partners. These include developing relationships with those working in the

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accommodation sector across Greater Lincolnshire including holiday park staff, B&B owners and hotel employees. It is also important to increase engagement with local residents.

- It is crucial to note that tourism and day visitor activity across the study area is very seasonal (despite attractions in the shoulder months like the seals at Donna Nook in Nov/Dec and the Wolds Walking Festival in May), and so any strategy for overcoming some of the aspects of seasonality would be welcomed.
- The challenge identified is to develop investment opportunities that will increase the overall economic benefit associated with nature-based tourism in Greater Lincolnshire. This can be achieved by encouraging those with no interest in the area's natural heritage at present to start to engage with it, and by encouraging those with some interest to convert to more active engagement. More active engagement includes additional spending – whether this is on entrance fees and guiding services; accommodation or associated food, drink and travel costs or other shopping.

## 4. Estimating the economic impact of nature tourism in Greater Lincolnshire

- Based on an initial desk-based analysis, the Leeds Beckett University report estimates **the current value of nature based tourism and leisure activity to Greater Lincolnshire to be as much as £325 million, of which £51 million is associated with holidays and day trips where engaging with wildlife is the primary purpose**. Day visitors are by far the largest single market in volume terms, but the staying (tourist) market is almost its equal in terms of overall economic impact.
- **Efforts to increase the value of nature tourism across Greater Lincolnshire need to consider both day and visitor segments**, and the niches within each group. For the day visitor market, attracting residents of surrounding counties into Greater Lincolnshire will increase the additional element of day visitor spending. At the same time, efforts should also be made to retain the local resident market to reduce leakages out of the economy.
- Converting existing day visitors into overnight guests will lead to an increase in average spend per head, no matter what type of accommodation is used.
- For the staying tourist market, attempts must be made to target users of all accommodation types, as they are all important components of the visitor mix.

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

A wide range of challenges and opportunities have been identified: considering these as a whole it is worth noting that **many of the challenges are not sector specific**. Lack of funding, perceptions of Lincolnshire and its transport infrastructure as well as a poor quality accommodation offer apply equally to all tourist sectors. While the opportunities superficially appear to be more nature tourism related, with further analysis these again primarily reflect common themes, including better product development and marketing as well as extending the season. For example identifying clusters of attractions to create critical mass and using seasonal natural events (e.g. bird migration, seal pupping) as a springboard for tourism activity.

## 6. Recommendations for action

- The report provides guidance to the GLNP on the current scale and value of public engagement with the natural heritage of Greater Lincolnshire, and proposes opportunities for action to increase the value of nature tourism to the local economy.
- Using a wide range of secondary data sources, some baseline information has been provided on the likely volume and value of nature tourism (including day visits by residents of the study area). **It is recommended that additional primary research is carried out** in the coming years to provide data on rates of engagement with the landscape and with wildlife across Greater Lincolnshire, and the market segment spending patterns relevant to the area. Securing such information will enable a more robust calculation of the economic impact of such activity in the future. At the same time, primary research with key market segments on the motivations for engaging with the natural environment across Greater Lincolnshire, and on perceptions of the current product offer, will enable the development of more tailored marketing and product development initiatives.
- The proposed actions presented in the report are provided as a catalyst for discussion and development by the GLNP and its Partners. Some recommendations could be piloted as early as 2016 whilst others will require further thought and development, exploring both current and new partnership networks.

The GLNP is grateful to the GLLEP for their support in producing the research report.

This summary has been written by the GLNP and is endorsed by the authors of the report.



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