



**Developing Ecotourism on
the Isle of Sheppey**

Initial Consultation Document

June 2004



Developing Ecotourism on the Isle of Sheppey

Executive Summary

In recognition of the need to diversify the Isle of Sheppey's tourism base to safeguard the long-term economic benefit of tourism to the Island, a partnership comprising the Elmley Conservation Trust, the Medway and Swale Estuary Partnership and Swale Borough Council, is exploring the potential of the marshland area in the south of the Isle of Sheppey for ecotourism¹ development. The Island has an extremely rich and unique natural heritage resource in the south, with Elmley NNR as its 'jewel in the crown', yet this marshland habitat is little known and visited by residents and visitors.

The partnership commissioned a study by an independent ecotourism consultant during January - March 2004 to explore the feasibility and potential of developing ecotourism on the marshland area to the south of the Island. This study included surveys with current visitors to Elmley NNR and with potential future short break visitors, a product audit, visits to successful destinations to determine best practice and pitfalls in developing ecotourism, and an initial consultation with key stakeholders.

The study showed that there is significant potential, and support from key stakeholders, to develop ecotourism on the Isle of Sheppey. The natural product exists – the unique landscape of the marshland area in the south, particularly in Elmley NNR, the prolific bird life and the sense of wilderness and spiritual uplifting that this combination affords – and there are already some existing services and facilities for visitors. Current visitors (predominantly RSPB members), however, do not impact to any significant degree on the local economy, and hence cannot be considered as ecotourists. The study showed, however, that these 'specialist' nature tourists could be converted into ecotourists by improving and enhancing existing facilities and thereby providing them with opportunities to spend in the local economy.

Significantly, the study identified the existence of considerable potential for Elmley and the surrounding countryside in the south of the Island from more 'recreational' type nature tourists. These visitors enjoy a wide range of ecotourism pursuits from walking, cycling, horse riding and bird-watching to guided wildlife and nature walks/drives and events. Many of these activities, if developed, would bring economic development to the Island. In addition, these types of tourists would use accommodation in the area, again increasing their economic potential. 'Recreational' nature tourists enjoy nature but in a comfortable environment and hence more facilities need to be developed to service this market, than for the more hardy 'specialist' nature tourist types.

The study also showed that there is a niche market for 'nature breaks' (both for specialist and recreational nature tourists) on the Island with accommodation in

¹ Ecotourism - Travel to natural areas that has low environmental and social impacts, and which contributes to the maintenance of species and habitats through making a direct contribution to conservation and by providing income to the local community sufficient for local people to value, and hence protect, their natural heritage area as a source of income.

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ecolodges or walker/cyclist friendly accommodation establishments. Employment in the form of tour leaders for these breaks (photography, bird-watching, botany, local history etc.) would add to this type of tourism's economic impact on the area.

To catalyse the development of ecotourism on the Island and to establish the area as a credible, and world-class ecotourism destination, the consultant has advised the scoping of a new multi-sensory visitor attraction centred on the bird and its relationship with the marshland on Sheppey, the sea etc. aimed at 'recreational' nature tourists.

The consultant has advised that by adopting development and marketing strategies that 'get behind the bird' (which is Sheppey's key and unique strength from an ecotourism perspective) that Sheppey will have the necessary edge to make inroads in a competitive marketplace. A new tourism branding strategy centred on the bird and nature (with the lapwing potentially an icon for the area) needs to be developed to portray a consistent and competitive tourism message to consumers to achieve this. Energy also needs to be invested in gaining support from existing tourism businesses on the Island to adopt this strategy and to foster collaborative working and product 'links' between the various ecotourism suppliers on the Island.

Within 10 years of implementing the outlined ecotourism marketing and development strategies, it is forecast that ecotourists will generate in the region of £4.1 million² of direct tourism expenditure into the Island's economy p.a. and support 140 jobs.

Next steps for the partnership involve wider consultation, the scoping of the various developments outlined in the consultant's report and the development of a new tourism branding strategy (and icon) for the area.

² In 1998 equivalent money

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Aim of Study

A partnership comprising Swale Borough Council, Medway and Swale Estuary Partnership and the Elmley Conservation Trust, has jointly initiated and funded a study into the feasibility of developing ecotourism on the Isle of Sheppey. The study seeks to explore the **potential of the marshland area to the south of the Island for ecotourism**, with particular focus on the role of Elmley National



Nature Reserve (NNR), with its unique landscape and abundance of birdlife, to act as a catalyst for such development.

If the potential exists, the study also aims to formulate tourism development and marketing strategies for the Island based on ecotourism.

This feasibility study concentrates on the natural habitat and landscape to the south of the Island, which currently remain hidden, unexplored and largely unappreciated by both residents and visitors alike, as these present a unique opportunity to diversify the Island's economy through a tourism and leisure resource based on nature.

Reason for Study

The study was initiated for three key reasons:

- **Sheppey's traditional long-stay seaside tourism market is in severe decline.** The growing affordability of overseas package holidays – along with the guarantee of sunshine - coupled with the relatively high cost of holidaying in the UK, have in combination lead to an upsurge in the number of Britons holidaying abroad each year on a 'sun, sea and sand' package holiday. In addition to this trend, the advent of the low cost airlines has seen a shift for many consumers in the UK market away from longer holidays towards taking several short breaks of 1-4 nights away from home each year.

The future of the Isle of Sheppey's tourism industry is hence in jeopardy if steps are not taken now to develop new forms of tourism and leisure products that appeal to today's more discerning tourists and at the same time taps into the growing market for short breaks.

- Short breaks are principally motivated by the need to escape the stresses and strains of increasingly hectic lifestyles to relax. Not surprisingly, therefore, a large proportion of short breaks are taken in natural areas.

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As a result, **ecotourism is one of the fastest growing sectors of the tourism industry** with annual growth rates currently between 10-30%, representing 6% of global GDP. This is set in a marketplace where the majority of other tourism sectors are stagnant or in decline.

■ The marshlands to the south of the Island are designated internationally as a Special Protection Area (SPA) for the conservation of birds and their habitats, and are listed as part of the Ramsar Convention on the conservation of wetlands. As such these marshlands are among the UK's most important wildlife habitats for birds, plants and invertebrates and have been designated accordingly as Sites of Special Scientific Interest (SSSIs).

Despite being so unique and special, **the marshland area to the south of the Isle of Sheppey is largely unexplored and unappreciated**, by both residents of the Island and visitors to Kent. There is hence an abundance of untapped tourism potential on Sheppey, which if developed appropriately could meet the needs of the lucrative nature short breaks market.

What is Ecotourism?

Many different definitions of ecotourism exist, and hence it is important at the outset to clarify its definition for the purpose of this study.

Ecotourism is in fact a **sustainable form of 'nature tourism'**, whereby people travel to natural areas for the purpose of enjoying wildlife and landscapes. Earlier definitions focused principally on the 'low environmental impact' nature of ecotourism as the aspect that made it sustainable. However, the often voiced adage amongst proponents of this definition of ecotourism, namely **'take only photographs, leave only footprints'**, is not enough. To be truly sustainable ecotourism also needs to **contribute directly to the conservation of the area** and ensure that the local 'host' population achieves rising standards of living as a result of tourism. **Ecotourists need to leave money in the local economy** so that local people value, and hence want to protect, the natural heritage with which they live.



Ecotourism is hence defined in this study as³:

'Travel to natural areas that has low environmental and social impacts and which contributes to the maintenance of species and habitats through making a direct contribution to conservation and by providing income to the local community sufficient for local people to value, and hence protect, their natural heritage area as a source of income. Inherent in this is that the local community are fully aware of the source of this income'.

All references to 'nature tourism' that follow in this document refer to nature tourism that is managed so as to meet the definition of ecotourism given above.

³ Mvula C. 2001. Fair Trade in Tourism to Protected Areas. *Int. J. Tourism Res.* 3: 393-405

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Methodology

An ecotourism specialist⁴ was commissioned by the partners to conduct the study. Phase 1 was conducted over the 3-month period January-March 2004. This consisted of:

- **Audit of Existing Product** – to establish what is on the ground currently from a nature tourism perspective and to identify gaps in the current product offering.
- **Consultation with Key Stakeholders** - to determine attitudes towards the potential development of ecotourism to the south of the Isle of Sheppey and to solicit opinion on what form this development should take.
- **External Site Visits** - to research best practice and pitfalls in developing ecotourism at similar habitat-type destinations.
- **Survey with Current Visitors** - to understand how the marshland area to the south of Sheppey is currently being used by visitors during the winter.
- **Survey with Potential New Visitors** - to gain an understanding of what the general short break market requires of a nature-based short break leisure experience.

Product Audit

The audit of existing product confirmed that there is sufficient unique natural product in the marshland area to the south of Sheppey to motivate ecotourists to visit. This natural product extends from Elmley NNR in the south-west of the Island, through the Capel Fleet area with its rich abundance of birds of prey, to Swale NNR in the south-east.

Attracting upwards of 15,000 visitors a year, Elmley NNR - including the RSPB Reserve at Spitend - is currently Sheppey's 'honey-pot' nature tourism destination. It really is the Island's '**Jewel in the Crown**' with its big skies, wide-open spaces, unique landscape, outstanding bird spectacles and its sense of remoteness and wilderness. It appears to capture the hearts of the thousands of people that visit every year and draws them back time and time again with its captivating character. As a nature tourism destination it is totally unique in the South East of England, and arguably one of its finest.



⁴ Tribal Voice Communications

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The reserve is unique in that it is the first NNR in the UK to be both wholly owned and managed by an organisation with farming roots. English Nature gave approval for the owner (the Elmley Conservation Trust - ECT) to manage the NNR because of its outstanding agro-environment land management principles and actions. Sheep and primarily cattle are grazed on the reserve and the water levels controlled through a network of ditches and rills, all combining to create a mosaic of different habitats second to none in terms of its



productivity for waterfowl and birds of prey along with many species of rare plants and an astonishing range of insects. Bird numbers are steadily increasing as a direct result of this

positive management and Elmley now has the largest concentrations of wildfowl and wading birds in the entire South East of England, and is recognised as a bird site of international importance.

In terms of future ecotourism activity, the area around the Ferry House Inn at Harty also has great potential. The Inn itself is situated in a particularly attractive location overlooking the Swale estuary, serves good pub food, offers 4 Diamond quality accommodation, and is ideally suited to meet the needs of the ecotourism market. Close by, Capel Fleet is particularly good for bird of prey sightings, whilst Swale NNR has a wealth of waterfowl and breeding waders in the most wonderful landscape. Both are, however, currently under-developed from an ecotourism perspective lacking basic visitor facilities and amenities. Swale NNR also suffers from being 'cut off' from the main visitor flows to the Harty area, as currently the official access point is located on the far south-easterly point of the Island at Shellness.

There are no other facilities and services for nature tourists in the south of the Island. There are no signed walking routes, no horse-riding or cycle routes, nor any other quality accommodation or campsites in the area.

In summary, Sheppey has an abundance of natural resources on which to develop a successful ecotourism product. Natural product abounds, and it is unique and special enough to motivate nature tourists to visit. Services and facilities to cater for ecotourists, however, are severely limited, and these will hence need to be developed before Sheppey can take a share of the growing ecotourism market.

Stakeholder Consultation

A selection of stakeholders across the public, private and NGO sectors were consulted at an early stage of the study to determine attitudes towards the potential development of ecotourism to the south of the Island and to solicit opinion on what form this development should take.

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These consultations were also used to inform the draft development and marketing strategies set out in this report, along with identifying potential external funding sources necessary to implement these strategies.

Consultees included Swale BC officers and members, the RSPB, English Nature, the Kent Wildlife Trust, DEFRA, the MP for Sheppey & Sittingbourne, local tourism businesses and UK-based nature tour operators.

All consultees, without exception, acknowledged the tremendous ecotourism potential of the Island given its unique natural heritage, and were fully supportive of developing ecotourism on Sheppey. Key benefits to the Island of developing ecotourism were cited by stakeholders as:

- Improve local economy
- Support conservation of the area
- Change negative perceptions of Island amongst residents and potential visitors

External Site Visits

During the study period three external sites were visited which had similar wetland habitats to the south of Sheppey, along with developed tourism industries based on nature. The aim was to gain an understanding of what was on the ground ecotourism-wise at each and to determine best practice and pitfalls in its development. The lessons learnt from these site visits were called upon in formulating the draft ecotourism development and marketing strategies for Sheppey set out later in this document.

The 3 sites visited were:

- North Norfolk Coast
- Baie de Somme
- London Wetland Centre

1. North Norfolk Coast

The North Norfolk Coast is recognised as a nationally important landscape through its designation as an Area of Outstanding Natural Beauty (AONB). The AONB covers 451 sq km of north Norfolk, from the shores of the Wash to Winterton in the east. With over 30 designated wildlife sites, the AONB is of exceptional international, national and local nature conservation importance. It contains habitats, species and landforms which in variety are perhaps unparalleled anywhere else in England. The wildlife is an attraction in itself, and in particular the area is renowned as a bird-watching Mecca, and is ranked by many as the number one area for birds on mainland UK.

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The North Norfolk Coast is a strong tourism brand. Visitors to the area are motivated to visit primarily because of the area's natural features – it's beautiful beaches, it's gentle countryside and rural villages – and a number of seaside resorts (Cromer, Wells, Sheringham, Hunstanton) serve as honey-pot destinations for summer visitors. Outside of the main summer tourist season the area receives many visitors who are interested in nature (bird-watchers, walkers, horse-riders, cyclists etc.) and in this way **the tourist season is effectively extended.** The area is **particularly well equipped to meet the special needs of these visitors** e.g. camping barn, specialist bird-watching tour operators, clearly marked circular walking trails, cycle routes, horse-riding facilities, seal watching boat trips etc.

Bird-watchers frequent the many nature reserves along the coast including Holkham NNR, Titchwell Marsh Reserve, Cley Marshes and Morston Quay.



Tourism to these reserves has **significant economic impact** as well as contributing to the conservation of the area. It was estimated in a recent study that visitors to 6 wildlife tourism sites along the North Norfolk Coast spent £5.3 million on the day of their visit and £20.8 million in the area during their trip as a whole. 666,000 visitors were estimated to visit these 6 sites each year.

The area is not currently, however, marketed pro-actively for nature tourism and there is a distinct lack of collaboration between the different 'nature' tourism providers in the area, hence **not maximising its potential.** Additionally, no real 'champion' for ecotourism development and promotion exists in the area as evidenced by the absence of ecotourism development and marketing strategies.

Key Lessons Learnt

- North Norfolk Coast is a strong, well-known tourism brand
- Tourism season is extended through nature tourism
- Product well developed to meet the needs of nature tourists
- Nature tourism has a major economic impact on the area
- Potential not maximised by absence of pro-active marketing of destination for ecotourism and lack of collaboration and linkages between nature tourism providers

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2. Baie de Somme

The Baie de Somme is an area of 70km of coastline on the Picardy Coast in Northern France close to Abbeville, circa. a 45-minute drive from Calais. It is the largest estuary in Northern France, is of exceptional international, national and local nature conservation importance and is a designated Ramsar wetland site. The bird life in the area is phenomenal and the mix of sand dunes, coastline, grazing marsh and farmland give the area a very natural feel.

20 years ago tourism in Baie de Somme was reliant on the traditional, long stay, seaside-type holiday, and tourism product was centred principally on the beach and water sports. Accommodation provision was in the main served by static caravan parks and camping sites. **Today the face of tourism has totally changed and the area is now known as a haven for 'recreational'⁵ nature tourists**, with the key symbol of this change being the high profile status of the area's birdlife. This transformation has been brought about by a concerted drive to develop ecotourism in the area by the public corporate body SMACOPI. SMACOPI is responsible for sustainable development around the Baie de Somme.

Today the whole area is a Mecca for bird and nature lovers. **All tourism providers and infrastructure in the area are geared to providing visitors with an ecotourism experience**, and visually throughout the area the bird is king. Stone statues of birds can be found on roundabouts and in prominent locations in villages and towns. **Birds also take centre stage** on the area's promotional materials and communications. The caravan parks and camping sites that serviced the traditional sea-side holiday market are still in business, but they have **re-invented themselves to meet the needs of nature tourists**. Additionally a variety of new B&Bs and hotels have sprung up over the last 2 decades to service the area's increasing visitor base.



At local Tourist Information Centres (which also act as a 'shrine' to the bird and nature) leaflets and information can be found on a whole range of nature tourism pursuits that the visitor can participate in from bird attractions (nature reserve, a bird park and a bird interpretation centre), guided estuary walks, way-marked cycling and walking

⁵ Nature tourists who have non-specialised interests (e.g. not specialist bird-watchers etc.)

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routes, horse-back safaris, boat trips to spot seals, fishing, sea kayaking and sailing, micro-light flights to view the landscape through to numerous nature focused events and festivals.

Key Lessons Learnt

- A declining, traditional sea-side holiday destination has transformed its tourism industry through ecotourism, so that today it has a thriving, dynamic tourism industry centred on nature.
- Tourism product in the area is ideally suited for 'recreational' nature tourists with a wide range of visitor attractions, services and facilities geared to their needs.
- The development of 2 new visitor attractions centred on the bird has stimulated visitation to the area by 'recreational' nature tourists. This has catalysed the evolution of many other nature tourism businesses in the area (new and diversification of existing tourism businesses).
- Existing accommodation infrastructure (caravan parks etc.) has reinvented itself to meet the needs of nature tourists.
- Strong sustainable development drive led by both public and private sectors (SMACOPI) with local people a true participatory partner in this process.
- Local businesses working in a co-ordinated way to deliver tourism product with lots of linkages - facilitated by sharing a common goal for the area's development through ecotourism.
- Tourism branding strategy based on nature and the bird (and its relationship with man) is hitting the mark with existing visitors. Well targeted and professional marketing materials are all centred on this branding strategy, and outward, visual manifestations of this brand are widely evident (logo, bird statues on roundabouts, cycling routes named after birds etc.).
- Ecotourism development depended on substantial financial support from the state and public sector (SMACOPI) during first 20 years.

3. London Wetland Centre

The Wildfowl & Wetlands Trust (WWT) is the largest international wetland conservation charity in the UK. WWT's mission is to conserve wetlands and their biodiversity. WWT has 9 visitor centres, covering around 2000 hectares in Northern Ireland, Scotland, Wales and England, where people can get closer to wetland birds and enjoy spectacular wetland landscapes in a welcoming and friendly environment. **Its visitor centres have welcomed circa. twenty million people over the years**, introducing children and adults alike to the wonders of wetland birds and their habitats. The award winning London Wetland Centre is the first project of its kind in the world - more than 40 hectares of created wetlands in the heart of a capital city. Opened in May 2000, the London Wetland Centre offers hundreds of thousands of visitors the chance

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to see rare and beautiful wetland wildlife just a stone's throw from central London.

Key Lessons Learnt

- Bringing people close to birds in a friendly and comfortable environment has made for a successful visitor attraction based on nature.

Survey with Current Visitors

Elmley NNR, as the current honey-pot destination on Sheppey for visitors interested in nature, was selected as the location to conduct a survey of current visitors to the south of the Isle of Sheppey. The survey sought to understand how the marshland area to the south of Sheppey is currently being used in the winter period by visitors. It also sought to determine the profile of current visitors, what motivates them to visit natural areas in general, and to establish what improvements they would like to see to the nature product on Sheppey.

268 face-to face interviews were carried out with visitors to Elmley NNR during January 2004 using a structured interview questionnaire.

Key Findings

A. Current Visitor Profile

- Three quarters of current visitors are RSPB members and can be classified as 'specialist'⁶ nature tourists
- Older age profile - majority over 55 yrs; only 8% less than 35 yrs old
- Males outnumber females 2:1; Few families
- Over half live in Kent; 20% London; rest Home Counties; only 2% of current visitors are from the Isle of Sheppey
- Fairly affluent; Predominantly 'Empty Nesters'⁷
- Majority are very frequent visitors to natural areas having visited them 10+ times in last year (7 times to Elmley in last year) and visit all year round

B. Motivations for Visiting Natural Places

The key motivation for visiting natural places amongst current visitors was **bird-watching**. This is not surprising as three quarters of current visitors are



⁶ Have a specialised interest (e.g. bird-watching, cycling etc.) which is the key motivator for their leisure travel

⁷ Aged 45-70, AB socio-economic group, married, children now left home

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members of the RSPB. Other motivators, in order of priority, are:

1. To be a relaxing environment
2. Peace & quiet
3. Attractive scenery
4. Walking

C. Activities Engaged in whilst on Sheppey

Whilst visiting Sheppey, **bird-watching** was the key activity engaged in by current visitors, followed by walking.

Additionally, many of the non-RSPB members interviewed also visited an attraction or the sea-side and had a meal or drink in a local pub as part of their visit to the Island for bird-watching.

Almost all visitors were on a day trip from home.

D. Economic Return

Current nature tourists to Sheppey spend very little, if any, money in the local economy. This is partly due to the fact that almost all are day visitors, and hence do not use accommodation facilities. Perhaps more importantly, there are currently few opportunities for specialist nature tourists to engage in the local economy, as there are limited 'paid for' services and facilities catering for their needs.

Those visitors who do currently contribute to the local economy are 'recreational'⁸ nature tourists (the non-RSPB members amongst current visitors). The more general nature of their travel interests mean that they are more likely to use general tourist facilities and services on the Island (e.g. pubs, attractions etc.). Their impact on the economy is still currently low, however, as there are few opportunities to spend at present in the south of the Island.

E. Satisfaction with Visit

Current visitors are **extremely satisfied with their visit** to the Island, with the experience meeting or exceeding almost all visitors' expectations. Highlights cited included the sheer number and variety of birds (particularly birds of prey and waders), the stunning scenery, the standard of the bird hides and the overall management of Elmley NNR.

F. Product Development Opportunities

Several product development opportunities were highlighted by current visitors, which if developed would enhance their visit. Importantly, several of these would also generate income for the Island. These included:

- Eco-loo on RSPB reserve (requested by majority)

⁸ Reasons for leisure travel are varied – have many interests (opposite of 'specialists').

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- Café/refreshment facilities (requested by over half)
- Improved interpretation (map, reserve leaflet, signage) – Rural Visitor Centre (requested by a third)
- Clearly marked walking trails (requested by a third)
- Programme of events (requested by a third)
- Guided 4WD bird-watching safaris, guided bird-watching and botany walks (requested by 20%)
- Specialist week-end bird-watching courses, photography courses etc. (requested by 20%)

Summary

Nature tourism on the Island cannot currently be classified as ecotourism. It is of low environmental impact, and does contribute towards conservation - currently in the form of RSPB membership fees - but it is not returning income into the local economy sufficient for local people to value, and hence want to protect, the natural heritage with which they live.

The survey did, however, identify opportunities to develop ecotourism on the Island based on 'nature short break' product (for specialist and recreational nature tourists) and a range of new activities and nature product (4WD safaris, cycling, walking, horse-riding etc.) aimed at the recreational nature tourist.



The challenge is hence to:

- Attract more of the same types of visitors to Elmley (specialist nature tourists) and through improvements in the existing services and facilities offered encourage them to spend in the local economy.
- Develop new product aimed at the recreational nature tourist and promote the Island to this type of tourist for short breaks.

Survey with Potential New Visitors

The decision was taken to research the recreational nature tourism market, as a potential future ecotourism market for Sheppey. The survey undertaken with potential new visitors hence aimed to gain an understanding of what the general short break market to Kent requires of a nature-based short break leisure experience.

An on-line survey with general short break takers who were interested in nature and had expressed an interest in visiting Kent during 2003, was chosen as the most suitable method to research potential new markets. 2000 emails were

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hence dispatched to Kent Tourism Alliance's prospect database during February 2004.

237 recipients completed the web-based survey form, which at a 12% response rate was an excellent result⁹.

Key Findings

A. Customer Profile

- Majority surveyed were not members of wildlife/conservation organisations and classified as 'recreational' nature tourists
- Wide age range (equal numbers of males & females)
- Affluent
- Empty Nesters, DINKS¹⁰ and Caring Parents¹¹
- Reside in London and the Home Counties
- Majority are frequent visitors to natural areas (half visited 10+ times in last year) – visitation all year round, but dip during winter months

B. Motivations for Visiting Natural Places

Recreational nature tourists' key motivations for visiting natural places are to be in **attractive scenery and to relax**. They also expressed a need to escape the stresses and strains of everyday life and to be in peaceful and quiet surroundings. Note that their motivations are not centred on nature tourism activities (e.g. bird-watching, walking etc.) as for specialist nature tourists, but are of more an emotional nature.



C. Activities Engaged In / Product Needs

The recreational nature tourists surveyed **engage in many activities** when in natural places on a short break. These include, but are not limited to:

- Walking
- Cycling
- Bird-watching
- Countryside/nature events
- Horse-riding
- Sailing/watersports

⁹ Industry average response rate is generally 5-10% for surveys of this type.

¹⁰ Dual Income No Kids, 25-45 yrs, ABC1 socio-economic group, joint income exceeding 50k

¹¹ 25-45 yrs, ABC1, interested in their children's' education

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They stated that they would participate in guided walks, weekend 'nature' breaks and courses related to nature if they were available and would enjoy staying in 'eco-friendly' accommodation – which reflects the growing trend in 'responsible travel'.

Key product needs cited by respondents were:

- Accommodation in natural areas ('eco-lodges')
- Eating facilities (cafés/restaurants/pubs)
- Walking trails
- Good interpretation (reserve leaflet/map); Rural Visitor Centre
- Cycle routes/cycle hire facilities
- Easily accessible bird-watching hides
- Events
- Guided tours - 4WD safaris, guided botany and bird-watching walks
- Photography courses
- Working farm/conservation holidays & weekend 'nature' breaks



D. Economic Return

The impact on the local economy of recreational nature tourists is high. These visitors have high disposable income, are regular short break takers (i.e. use accommodation facilities) and are willing to use 'paid for' services and product.

Summary

The market demand clearly exists for tourism product based around nature amongst DINKS, Caring Parents and Empty Nesters in London and the Home Counties. **Recreational nature tourists of this profile are hence potentially a new ecotourism market for the Isle of Sheppey.** Ecotourism product enhancement and development plus a pro-active marketing strategy is needed if Sheppey is to take a share of this lucrative visitor base.

Ecotourism Development Strategy

Drawing on the research undertaken in this study with current and potential new visitors to the Island, the lessons learnt from external site visits and the consultation process with key stakeholders, a draft ecotourism development strategy has been formulated aimed at establishing Sheppey as an ecotourism destination of national significance.

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The development strategy centres upon:

- **A consistent and focused effort to centre future tourism development on the Island around nature, landscape and the environment**
- **Placing particular emphasis on the bird as the ‘champion’ and ‘lever’ for economic development on the island through ecotourism**

The real uniqueness and competitive advantage of Sheppey as a tourism destination within Kent, and indeed in the South East as a whole, is its rich natural heritage - large concentrations of wildfowl and wading birds in the most dramatic of wilderness landscapes. This is all set on the doorstep of London and the Home Counties, the biggest geographic markets for leisure short breaks in the UK. The affluent market segments of Empty Nesters, Caring Parents and DINKS feature strongly in these geographic markets, and as a key motivation for short breaks amongst these people is to escape the stresses of their busy daily lives and to relax in attractive surroundings (particularly the countryside), Sheppey’s nature tourism product, once developed, will act as a strong stimulus for short breaks for these people.

If from a development and marketing perspective Sheppey can successfully reposition itself over the next decade as **‘the Premier Nature Tourism Destination on London’s Doorstep’**, its tourism industry will not only be revitalised, but the local community and conservation will reap the benefits of this into the future.

The development strategy outlined in this report centres on **improving and enhancing existing nature product and developing new product centred on nature and the bird**. If developed appropriately over the coming years, Sheppey will become recognised as a premier nature tourism destination in the UK. It will also instil in local people and business a sense of pride in the place they live and work, and in their birdlife and natural resources.

The postcards below from a visitor to the Island in 2014, illustrate two potential futures for the Island. One depicts Sheppey through the eyes of a visitor if little or no commitment on the part of key stakeholders was made to develop tourism as an important part of the Island’s economy. The other represents the scenario where there has been a concerted and pro-active effort by key stakeholders and tourism businesses on the Island to work together towards the common goal of elevating the destination into a competitive position through ecotourism.

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 <p style="text-align: right;">June 12th 2014</p> <p>Dear Anna,</p> <p><i>Visiting the Isle of Sheppey for the day with Ben. Nothing much to write home about – just lots of amusement arcades, dilapidated caravan and chalet parks and other ‘traditional’ seaside fare that really is from a bygone age. Looks decidedly crest-fallen and run-down and not at all our scene. Going to make tracks pretty soon for Whitstable, which by all accounts is a vibrant, happening seaside type of place with nice seafood restaurants, an artisan community and lots of fresh air in more natural surroundings.</i></p> <p>See you soon</p> <p>Love Jules xx</p>	 <p style="text-align: right;">June 12th 2014</p> <p>Dear Anna,</p> <p><i>Arrived on the Isle of Sheppey a couple of days ago with Ben for our much earned short break away from the hustle and bustle of London. It’s a magical place. We’re staying in this really cool eco-lodge in the middle of a nature reserve – the views from our veranda are spectacular and you’ve never seen so many birds in one place at one time! It’s amazing. Yesterday we went for a walk along the estuary to a lovely country pub for lunch and then got a ride back in a 4WD safari vehicle to take in the local countryside.</i></p> <p><i>We must come back soon as a foursome! Love Jules xx</i></p>
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Development Options

A. Elmley NNR

Current visitors are extremely satisfied with their experience at Elmley. Several emphasised the need to protect the wilderness feel of the reserve by not over developing it and hence destroying the naturalness and remoteness of the landscape which attracted them to visit in the first instance. Many improvements were requested, however, by the majority of current visitors. Implemented sympathetically these improvements can only add to the visitor experience and will not detract from the wilderness feel of the environment. These improvements will also provide the basic facilities and services required by more ‘recreational’ type birders and walkers, and hence will open up this valuable natural resource for many more people to enjoy whilst generating income for the Island.

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The developments proposed at Elmley include:

- Eco-loo on RSPB Spitend Reserve
- Improved interpretation
- Better signage (“sense of arrival”)
- Refreshment facilities
- Improved educational facilities
- Rural Visitor Centre
- Regular events programme
- 4WD guided bird-watching safaris
- Guided walking tours (bird-watching, botany etc.)
- Develop eco-friendly self-catering accommodation (‘Eco-lodge’). To be built using environmentally sensitive design and sustainable development principles (self-composting toilets, solar power if practical etc.), as this will be a unique selling point
- Weekend nature breaks (for specialist & recreational markets) linked to new eco-friendly accommodation on Island (Eco-lodges)

B. South-East of Island

- Signed walking trails (named after birds)
- Signed cycling trials (named after birds)
- Cycle hire facilities
- Guided horse-riding safaris
- Guided seal viewing boat trips/estuary walks
- Improved visitor facilities (signage, interpretation, new hides) at Swale NNR and new access from the Harty area
- Visitor facilities (car park, interpretation) at the popular birds of prey viewing area along the public road at Capel Fleet
- Raise standards of accommodation (minimum of 4 diamonds), new camping facility, camping barn, Tourism South East’s (TSE) Walker’s Welcome scheme etc.
- Develop eco-friendly self-catering/serviced accommodation (‘Eco-lodges’)
- Longer term re-instate ferry service between Harty and Oare

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C. Throughout Island (including marshlands to south)

- New visitor attraction for the Island centred on the bird and its relationship with the marshlands on Sheppey, the sea, the environment and humans – aimed at catalysing the development of nature tourism on the Island
- Ecotourism businesses on the Island to form a Sheppey Ecotourism Association to facilitate product development, marketing, product linkages and collaboration between the different product providers
- Upgrade quality of accommodation stock (minimum of 4 diamonds), TSE's Walker's Welcome scheme, landscaping of caravan parks etc.



- Bird imagery prevalent throughout Island (on roundabouts, public places etc.)
- Promotion of local produce/crafts within ecotourism product offering
- Develop heritage/cultural trails
- Annual Festival of Birds

Marketing Strategy

The thrust of the draft marketing strategy is to reposition Sheppey, in the hearts and minds of 'recreational' and 'specialist' nature tourists residing in a 3-4 hour drive time of Sheppey, as **'the premier nature tourism destination on the doorstep of London'**.

Primary geographic markets targeted will be **London and the South-East, the area from London through to the Midlands, and near Europe (France, Holland and Belgium)**. In terms of life stage, **Empty Nesters, Caring Parents and DINKS** will be targeted.

To catalyse this repositioning of the Island a **new tourism brand strategy** will be researched and developed for Sheppey. It is anticipated, subject to consumer research, that the rational benefits of the brand will be nature, birdlife, nature-tourism activities, attractive scenery, coast etc. whilst the emotional benefits of the brand are likely to be relaxation, spiritual uplifting, revitalisation and so forth. As visual and verbal manifestations of the brand, a new marque (logo) and strapline will need to be researched and developed for the Island. The marque will very likely contain a bird symbol of some form within it.

Another key aspect of the marketing strategy is to **raise awareness of the new brand** amongst the Island's target markets. This can be achieved through promotional activity carried out for Sheppey by Swale Borough Council and the marketing activity of individual (and collective) tourism businesses on the Island, along with participating in partner organisation campaigns that target the

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same markets (e.g. Kent Tourism Alliance). The marketing will gain momentum and credibility over time as the nature tourism product is enhanced and developed on the Island, and the tourism industry and local community embrace the new tourism branding and development strategies for the area.

The strategy of marketing the Isle of Sheppey's **nature reserves product** to specialist bird-watchers as part of a **wider 'North Kent Marshes' brand** is also recommended. This emulates the 'North Norfolk Coast' brand positioning which is so strong within the specialist bird-watching market. Bird-watchers, as part of a short break in an area, prefer to visit several reserves. Currently the North Kent Marshes nature reserves product is not in actual, or perceptual terms, 'joined-up' and hence the majority of visitors only visit the area for a day trip. It is hence advised that the various stakeholders (RSPB, ECT, EN and KWT) work together to market the North Kent Marshes as an umbrella brand for the wider area. Bird-watchers would hence be motivated to visit the North Kent area for short breaks, as is the case in North Norfolk. Sheppey would benefit from this strategy in terms of the utilisation by this specialist market of the Island's accommodation stock, catering facilities and other nature product developed for ecotourists. If this part of the strategy is adopted, then Sheppey's own tourism branding needs to reflect its wider positioning within the North Kent Marshes brand (as Canterbury's tourism brand reflects and sits beneath the umbrella 'Kent – The Garden of England' brand). In this way Sheppey could lever off developments in the wider Thames Gateway Regeneration area (e.g. proposed developments at Cliffe Pools and at High Halstow). The formation of a **'North Kent Marshes Ecotourism Alliance'** is recommended to facilitate this partnership way of working amongst key stakeholders. One potential marketing outcome resulting from this alliance could be the production of a North Kent Marshes Reserves Brochure and/or website aimed at the specialist nature tourist market.

Economic Impact

Ecotourism has the potential to have a significant economic impact on the Island. If developed and marketed as per the outlined strategies, it will be an important part of the area's regeneration agenda producing new jobs and small enterprise development opportunities. This is important on an Island that has persistently high unemployment and a structurally fragile local economy, demonstrated by recent large-scale business closures. Sheppey also currently suffers from nationally significant deprivation, with three of six wards falling within the worst 20% nationally (IMD 2000).

Volume

It is estimated that within 10 years of implementing the development and marketing strategies outlined in this document that **150,000 ecotourists** will be visiting the Isle of Sheppey per annum. 10% of these are forecast to be staying

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visitors, amounting to **50,700 nights** spent on the Island per annum by ecotourists.¹²

Value

Ecotourists that stay on the Island are forecast to generate in the region of £1.5 million¹³ of direct tourism expenditure into the Island's economy p.a., whilst day visitors are forecast to generate a further £2.6 million p.a.¹⁴ i.e. **£4.1 million in total** (in 1998 equivalent money).

Employment

Ecotourism expenditure is forecast to support a total of **140 actual jobs** on the Island within 10 years:

- 100 jobs supported in establishments directly receiving tourist expenditure
- 40 indirect jobs (linkage and multiplier jobs)

Funding

Many potential funding sources to implement the development and marketing strategies have been identified in the public, private & NGO sectors including:

- ODPM (Sustainable Communities Fund)
- SEEDA
- INTERREG 111

Longer term, the evolution of a "green tax" scheme for those staying on the Island could be implemented to contribute towards the conservation of the area and the development of new visitor facilities.

Next Steps

From May-July 2004 the study moves into Phase 2 of its life. This phase seeks to:

- Consult more widely
- Conduct a visitor survey at Elmley during June/July (as profile of visitors are likely to be different from winter survey)
- Finalise development and marketing strategies following feedback from consultation process

¹² The Cambridge Economic Model run for Kent in 2000 (based on 1998 visitor data) estimates that staying visitors spend on average 3.38 nights in Kent during their visit

¹³ The 2000 Kent Cambridge Model estimated that staying visitors spent on average £101 per head (based on 1998 data)

¹⁴ Ditto £19.05 per head for day visitors



Elmley
Conservation
Trust

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Thereafter the partnership will seek funding/partners to implement the strategies.

Comments/Feedback

Feedback on the study from stakeholders and interested parties is sought, particularly on the draft ecotourism development and marketing strategies. You are, therefore, **encouraged to air your views** and input into this phase of the study by emailing your comments, thoughts and feedback to the ecotourism specialist working on this study **by August 18th latest**.

Dr Cheryl Mvula from Tribal Voice Communications can be contacted at cheryl@tribal-voice.co.uk