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**Nature-based Recreation and Leisure in Fenland Rural Economies - A
Case Study Approach**

Simon Henry Doncaster

A thesis submitted in partial fulfilment of the requirements of
Sheffield Hallam University
for the degree of Doctor of Philosophy

January, 2006.

Collaborating Organisation:
The Countryside Agency, (Yorkshire and the Humber Region).



Photograph 1: The Humberhead Levels, looking north from Gringley on the Hill.

Acknowledgements.

As befits a three year project involving numerous organisations, members of the public and necessitating travel to differing areas of the country, the number of individuals who assisted in the project, knowingly and unknowingly, is considerable. As such, many must therefore remain anonymous, and their assistance uncredited. In addition to these are those individuals who provided information but for reasons personal and employment-related, wished to remain anonymous. Without these many and varied contributions, the project and research would have been considerably more difficult, less informative, and considerably less fun. That people gave up their time to proffer information and aid the research is not only appreciated from the research perspective, but is also an indication of the enthusiasm and commitment, and therefore value, that individuals' place on wildlife and the rural, fen landscape. If nothing else, as an outcome of the research, that value and commitment is worth highlighting.

As well as the anonymous, there are those others without whose help the research would have floundered. Pre-eminent amongst these is the help and assistance given to the research by the Countryside Agency's Yorkshire and Humber Regional Office through Stuart Pasley and Sue Plaxton. As co-sponsors, in association with Sheffield Hallam University, the Countryside Agency provided support and access to data as and when required. In particular, Stuart Pasley and Sue Plaxton offered comments and advice on the research progress from a practitioners perspective, thus the research maintained a practical, grounded perspective as the project developed.

In parallel to the help of the Countryside Agency, academic assistance maintained the research direction and focus, whilst ensuring that an understanding of the research process was maintained. Thus grateful assistance was received from the Director of Studies and research supervisors, Dr. Ian Rotherham, David Egan, and Dr. Nicola Palmer respectively.

Appreciation must also be given to the numerous organisations and businesses who allowed the distribution of visitor questionnaires during the course of 2004, as well as offering other, informative advice. In particular, the following organisations and visitor attractions allowed visitor questionnaires to be distributed over several days, and thus contributed greatly to the research; the Wetlands and Wildfowl Trust's Welney reserve, the National Trust's Wicken Fen reserve, Flag Fen, the RSPB Ouse Washes and Blacktoft Sands reserves, Goole Waterways Museum, and Boston Park Farm.

In addition to the 'official' support and advice received, is the 'unofficial' support and advice, without which, as any PhD student knows, research life is a lonely existence. Thus, in no particular order, thanks to the following: Keith Harrison, Dr. Douglas Fraser, Ning Oratai Krutwayshe, Dr. John Rose, Mike and Paula Ford, Christine Handley, Paul Howden-Leach, Ray Nolan, Clare Foster, and Celia Shu Chin Tseng.

And finally, because they never get a mention but have been vital to the research process and the use of computer programmes, thanks to the following technicians for their help, advice, and subversive humour: Ray Garrow, Paul Bennett, Andy Radford and Stephen Kerry.

Abstract.

The research considers the importance of nature-based recreation and leisure as factors of economic generators within rural, fenland landscapes, and thus as contributors to rural economies. Using a case study approach, the research investigated the Humberhead Levels as a region of potential nature-based recreation and leisure demand, informed by existing, similar demand within the Fens and Somerset Levels and Moors. Through consultation of relevant literature, issues related to definitions of tourism and nature-based recreation and leisure were identified, as were factors relative to the assessment of economic contributions and landscape perceptions.

Through the use of interviews and questionnaire surveys of visitors and recreation businesses, the economic contributions of visitors were identified. Day-trip visitors were identified as the predominant visitor type, at a ratio of 3:1 over staying visitors. Within this, local visitors were also found to make important use of attractions surveyed, thus making important contributions to local economies. Visitor spend however, identified as relatively low at £7.39/visitor/day, conversely identifies that staying visitors contribute around three times the spend of day-trip visitors. Over three quarters of all businesses surveyed with recreation as a secondary income source, were identified as having turnovers below £50,000, at 78.6% of businesses surveyed. Whilst low, the importance of visitor spend in maintaining business viability was identified, particularly in respect of farm-based visitor attractions. Such businesses placed great importance upon visitor spend, with the research noting that without such spend, farm viability may be questioned, with implications for long-term landscape management.

The research identified a liking for open, flat, fenland landscapes, and a visitor loyalty to the regions investigated and the nature-based attractions within them. This was particularly so for wildlife attractions. The importance of such sites as catalysts to attract visitors and increase visitor spend within those regions is noted. With limited visitor numbers and low visitor spend identified, overall visitor income is limited. However, the research shows that such low demand and low spend make important contributions to local economies, through income and employment generation. It is therefore an important asset to local communities. With visitors noted as travelling considerable distances with respect to day trips, at a mean average of approximately 90 miles round-trip, a mix of attractions is noted as important by recreation businesses, with collaboration between recreation businesses identified.

In conclusion, the research has led to a recommendation for the establishment of a nature-based recreation and leisure market within Humberhead Levels. With day-trip visitors identified as predominant, and the current lack of accommodation noted within the Humberhead Levels, such a visitor market in the first instance should be day-visitor orientated. With the low visitor number and low visitor spend potential identified, any visitor-related market should be established in a low-key manner. As such, a nature-based recreation and visitor market so established has less financial outlay and risk. Engendering greater local involvement and greater local control, it retains a greater proportion of the economic benefits generated within the local region. Such a visitor market could exist alongside the predominantly agricultural economy of the Humberhead Levels, contributing to overall wealth and employment potential, and thus community viability. The economic and social benefits from nature-based recreation and leisure provide improved opportunities for more a holistic and long-term landscape management approach. Within this, wildlife and the managed landscape form central components.

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Photographs.

Photographs are included as a means to present the case study regions, rather than to illustrate particular points. They are, however, referenced within the text where appropriate.

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Abbreviations.

| | |
|---------------|---|
| CAP | Common Agricultural Policy |
| CPRE | Campaign to Protect Rural England |
| CRoW Act 2000 | Countryside and Rights of Way Act 2000 |
| EU | European Union |
| FTE | Full Time Job Equivalents |
| GDP | Gross Domestic Product |
| HHL | Humberhead Levels |
| IDBR | Inter Departmental Business Register |
| LMI | Land Management Initiative |
| NAFM | National Association of Farmers Markets. |
| NGO | Non-Government Organisation |
| ODPM | Office of the Deputy Prime Minister |
| OECD | Organisation of Economic Co-operation and Development |
| RBQ | Recreational Business Questionnaires |
| RSPB | Royal Society for the Protection of Birds |
| SSSI | Sites of Special Scientific Interest |
| SWLFP | South West Local Food Partnership |
| VQ | Visitor Questionnaires |
| WTTC | World Travel and Tourism Council |
| WWT | Wildfowl and Wetlands Trust |

A note on the use of 'Fen', 'fen' and 'fenland'.

Throughout the thesis, 'Fen', 'fen' and 'fenland' have been used in distinct contexts. With respect to 'Fen' and 'the Fens', these have been used in reference to the Cambridgeshire Fens, and thus refer to that area of England. However, in the context of discussing wetlands and generic fen landscapes, 'fenland' or 'fen' has been used, and no link is made to a specific location unless otherwise stated.

'Survey data'.

Data collected during interviews and referenced within the text is identified as '*Survey data*' in order to maintain the anonymity of those interviewed, as requested.

Chapter One: Introduction, research rationale, aims and objectives.

1.0.1. Introduction: Tourism, recreation, leisure and the research context.

In the ongoing climate of a troubled UK agricultural economy and its potential impact on the wider rural economy (HMSO, 1999; MAFF, 2000; Countryside Agency, 2004b), tourism as an instrument of economic growth and development is referred to in many and varied sources. As such, tourism and the establishment of visitor markets are often presented as a method of forestalling declining economies, rural as well as urban (Andrew, 1997; Countryside Agency, 2000c; Law, 2002; WTO, 2005). The rise of tourism as an economic sector of importance has therefore led to considerable discussion. Within the UK, much of this discussion is policy-based, including that emanating from UK agencies such as the Countryside Agency, the Departments for Environment, Food and Rural Affairs (DEFRA) and Culture, Media and Sport (DCMS). Within a wider academic context, more erudite discussions have occurred. Whilst Law (2002) considers urban tourism, Sharpley and Sharpley (1997) discuss the use of the countryside as a tourism resource. In such contexts, much debate exists with respect to definitions of tourism, tourists and tourism impacts, for example. Further debates occur on subsets of tourism, including the impacts on the wider tourism market of sustainable, nature-based, eco- and adventure tourism (Matheson and Wall, 1982; Blamey, 1997; Cooper *et al.*, 1998; Pforr, 2001; Hall and Boyd, 2005). As if such debates were not enough, the economic impacts of tourism and what should be included within tourism impact studies also receive much discussion (Hansen and Jensen, 1996; Leiper, 1999; Yu and Turco, 2000; Crompton *et al.*, 2001). Within the wider discussions of tourism and what constitutes tourism, the potential impacts and importance of day-visitors are also beginning to be realised (Flognfeldt, 1999; Downward and Lumsdon, 2000 & 2003; Bryan *et al.*, 2004; GBA, 2005).

Whilst tourism, its many subsets and impacts are discussed in detail in academic literature, within the scope of rural tourism there is an opportunity to investigate further links between rural economies, landscape management, and nature-based recreation and leisure. The latter could be considered an element of tourism, and in many respects is

for tourism businesses and visitors alike. However, within the academic context, and policy context of the past, recreation, leisure and transient visitors are frequently considered less important than the traditional tourist associated with overnight stays (Flognfeldt, 1999). Within this context, the current research considers the importance of visitors not normally considered to be tourists as contributors to rural economies, i.e. the impacts of nature-based recreation and leisure visitors. Whilst predominantly practitioner literature has identified the potential of such visitors as contributors to rural economies (Rayment *et al.* 2000; Rayment and Dickie, 2001; Rotherham *et al.*, 2002b & 2005b), academic tourism literature, although discussing such definitions, is more concerned with overnight staying tourists. Other types of visitor are less well represented.

1.0.2. Rural policy and the agricultural context.

Throughout the twentieth century, rural land use has been increasingly led by public policy and development through the leverage of public subsidy. Instigated by war-time shortages and the 1942 Scott Report regarding increased food production, the pressure driving policy change was towards agricultural intensification and production at the expense of other rural considerations. UK entry into the Common Market in 1973 and the adoption of the Common Agricultural Policy (CAP), with associated subsidies tied to agricultural output, further encouraged intensification. From the late 1980s onwards, however, policy changes have led to farm diversification and extensification, with recent phases of policy change being strongly tied to environmental, socio-economic and sustainable outputs. In particular, the increasing importance of recreation and tourism in rural areas has provided increased justification and incentives for policy change. Further to this, the increasing realisation of the impractical nature and expense of continued subsidies tied to agricultural production have encouraged numerous agri-environmental schemes aimed at removing land from intensive agricultural use. This has culminated in the de-coupling of subsidies from agricultural output through the introduction of the 2005 Single Farm Payment Scheme (Stoate, 1996; Evans and Morris, 1997; HMSO, 1999; Hodge, 2001; Fish *et al.*, 2002).

As a result of changes within agricultural policy and subsidies regimes, coupled with difficulties within the agricultural commodity markets, UK agriculture is experiencing a

period of uncertainty and change. Insecurity regarding subsidy payments, agricultural over-production and a steady, general decline of the agricultural sector has left many farms and rural communities short of investment and income opportunities (Barnes and Barnes, 1997). This situation is compounded by repercussions emanating from the 2001 Foot and Mouth Disease outbreak. It has been estimated that farm incomes have dropped to around 70% of 1970s' values, with farm investment at the lowest for 30 years (NFU, 2002). As a consequence, employment and career opportunities within rural communities are lessened, causing people to seek work outside of their home communities. Demand for local goods, shops and services are consequently reduced, with community facilities liable to close through lack of demand. Rural communities can therefore become increasingly isolated and marginalised from the main UK economy, with a trend for an increasing income gap between economic and social sectors. Thus whilst agriculture is not the only source of employment and income within rural areas, a decline in agriculture nonetheless affects the wider rural economy, and produces 'knock-on' economic effects (Countryside Agency, 2001b & 2001d).

1.0.3. Tourism, visitors and agriculture.

Although agriculture has traditionally been the main source of income in rural areas (Countryside Agency, 2001d), visitor income now contributes considerably more to the rural UK economy. Rural tourism and recreation are noted as being of increasing and significant importance since the 1950s (Sharpley and Sharpley, 1997). Visitor income in the English countryside totalled £12 billion in 2000, whilst agricultural income totalled £2.51 billion (Countryside Agency, 2001b). With over 70% of England's land area being farmed (Countryside Agency, 2001d), much rural tourism, and therefore visits, rely on the agricultural landscape either as a location or a backdrop for a recreational activity. As such, the managed countryside is a vitally important resource with respect to the English, and indeed UK, tourism market (Rilla, 2004). In this respect, land management through agricultural practices, with much agricultural policy influence since the 1940s, has been instrumental in the development of the UK landscape. It is thus a component in the development of rural tourism (HMSO, 1999; Countryside Agency, 2001b & 2001d). However, future changes in agricultural practices precipitated by subsidy and commodity prices changes could impact on the more valuable visitor and tourism sectors (Tyrväinen *et al.*, 2001), and thus require consideration. A trend to

larger, capital intensive agricultural holdings could result in detrimental changes to landscape aesthetics (Countryside Agency, 2001d), and thus lessen visitor appeal. Should farmers and farm employees continue to leave the agricultural sector as expected, intensive, mechanised agricultural production could increase in some areas through the creation of larger landholdings and the benefits of economies of scale (MAFF, 2000; Countryside Agency, 2001b). Whilst reduced landscape quality and visitor potential could result from intensification, associated decreased agricultural employment potential may also lower rural community viability. This may precipitate the further decline of rural communities and economies. Such decline may further affect the visitor potential of a region. Whilst rural tourism and its value are expected to grow overall (Countryside Agency, 2001b), this may not be true of all rural areas. Those usually considered to be less attractive by the public often include open, intensively managed agricultural land (Kaltenborn and Bjerke, 2002). Such areas may become economically fragile and increasingly dependent on the agricultural sector.

1.0.4. Research rationale.

The research rationale is set within the context of changing agriculture, issues of rural community viability and the importance of rural tourism. It considers opportunities for enhancing rural economies in association with nature-based recreation and leisure development. With the 2005 Single Farm Payment Scheme instigating a de-coupling of production-based agricultural subsidies, and in consideration of water management cost implications contained within the 2000 EU Water Framework Directive, the research is set against the background of declining and uncertain agricultural economies and farm viability. As such, the research considers an holistic, sustainable approach to landscape management as supported by small-scale visitor enterprises reliant on or benefiting from nature-based recreation and leisure.

With respect to agricultural viability and potential costs associated with water management, the integrated water management policy central to the 2000 Water Framework Directive noted above has implications for agricultural viability in terms of water use and potential water pricing. As such, water pricing that accurately reflects water use, i.e. water abstraction, irrigation and remediation of water pollution associated with fertilizer and pesticide run-off from agricultural operations, could greatly increase

agricultural costs and therefore limit agricultural operations (WWF, 2001). Further to this, legislation requiring the protection of wildlife habitats from agricultural or other development or water pollution may preclude potentially damaging agricultural operations within their vicinity. This may impact on agricultural productivity, income potential and farm viability.

Concurrent to such factors is the public perception of low-lying agricultural landscapes within the wider visitor conscience, and how such landscapes fit within the "*tourist gaze*" (Urry, 2002, p.1) of that visitor conscience. Entrained within that 'gaze' and its anticipation of pleasure (Urry, 2002), whilst delimited by the management of the rural landscape, is the importance of wildlife and aesthetically pleasing landscapes as visitor attractants. Much tourism research is associated with aesthetically pleasing environments, and less so with environments considered unattractive (Hall and Boyd, 2005). The research offers the opportunity to explore public perceptions of low-lying, intensively agricultural landscapes presumed to be less popular (Strumse, 1996; Kaltenborn and Bjerke, 2002).

Agricultural changes and integrated water management therefore present opportunities for environmental improvements and the development of wetland areas with potential for recreational use and the encouragement of wildlife. Added to this are considerations of flood management, pollution control and water supply, both for drinking purposes and agricultural use (WWF, 2001; Environment Agency, 2002). Such factors are particularly relevant in areas of intensive agriculture and poor biodiversity (Cranfield University, 1997; Chamberlain, 2000). It has been argued that increased interest in environmental, 'green' and wildlife issues is associated with rural, countryside visitor demand. This creates the potential for rural visitor attractions based around nature-based leisure activities, including birdwatching, cultural history and appreciation of scenery (Higgins, 1996; Sharpley and Sharpley, 1997; Anon., 1999a; Bowels and Green, 2001; Newsome *et al.*, 2002). With agricultural subsidies moving away from factors of production, (e.g. crop and livestock output) to factors of landscape and environmental management, with the Single Farm Payment and agri-environmental subsidy schemes, landscape changes and the development of nature-based visitor attractions present opportunities for rural communities. In conjunction with agriculture, such attractions may provide a greater diversity of income sources, thus benefiting rural economies through less dependence on a single, 'mono' economy. Developed, managed and

marketed appropriately, nature-based visitor attractions may offer rural landowners alternatives to intensive agricultural production. They provide incentives to adopt less intensive and more environmentally sensitive agricultural methods, with benefits for the environmental resource and associated biodiversity.

Thus, the research question asks:

“To what extent could nature-based recreation, in the context of improvements to and maintenance of a lowland, wetland landscape, contribute to rural economic viability?”

With respect to this, and in order to build on work already undertaken, the Humberhead Levels were selected as the primary case study region. The justification for a case study research approach and the details of the primary and supporting case study regions identified are discussed and noted further within Chapter 3.

1.0.5. Aims and Objectives.

Using a case study approach, the research aims to investigate the potential for nature-based recreation to provide an additional income source in rural areas. It can thus support existing economies, including economies predominated by agriculture. As noted earlier, as well as potential economic benefits, it is assumed that further, associated benefits would occur. These include an improved landscape quality, improved environmental and wildlife resources, and benefits related to community viability and service provision. To inform the research, the social and economic effects of visitors to rural communities are noted, and the importance of wetland-associated wildlife habitat as a visitor attractant is investigated. Pertinent to this is an understanding of the public perception of the landscape within the case study regions, and the implications for rural recreation and leisure demand in lowland landscapes. The research aim and objectives are:

Aim:

- ◆ To examine the relationship between nature-based recreation and rural economies.

Objectives:

- 1) To critically review relevant literature.
- 2) To examine the context and development of nature-based recreation.
- 3) To review nature-based recreation within the context of rural economies including and beyond agricultural diversification.
- 4) To identify and make comparisons between case-study regions within the UK.
- 5) To evaluate the potential economic contribution of existing nature-based recreation enterprises within the case study area, with a particular reference to wetland-resourced, nature-based attractions.

Within the broad objectives outlined above, the research progress identified factors considered important, and thus the objectives were developed and refined as detailed.

Refined objectives:

- 1) To what extent is visitor income important with respect to agricultural incomes and landscape management?
- 2) What is the visitor perception of the landscape within the selected case study regions?
- 3) What is the predominant visitor type within the selected case study regions, and thus what form of nature-based visitor development, if any, would be most appropriate within the primary case study region?

With the aim and objectives of the research thus noted, and following on from a review of the literature and the development of a research methodology, data collection commenced in March, 2004.

1.0.6. Thesis structure.

Chapter 2 reviews literature, considering issues of tourism as a development option, definitional issues surrounding tourism and visitors, and an understanding of the term 'local', central as it is to assessing the economic impacts of visitors. With respect to economic factors, Chapter 2 discusses the collection and application of economic data with respect to income and employment potential, and what data should be included within economic impacts studies. Further to this, the difficulty of economically valuing wildlife and the environment is also discussed. Chapter 2 also reviews literature regarding perceptions of landscapes, and the importance of aesthetically pleasing landscapes.

Chapter 3 details a review of research methodologies, and identifies the methods adopted for the research. Following on from this, the UK case study regions are identified and a brief description of each region provided. Further to the methodologies used, Chapter 3 details the practicalities of the data collection process and issues encountered, including stakeholder analysis and the location of recreation businesses considered suitable for the research requirements, concluding with a discussion of the data analysis procedure and questionnaire return rates.

Chapter 4 details the results and analysis of the visitor data collected. These include visitor preferences for landscape and considerations for policy (Chapter 4, Section 2), a profile of visitors identified during data collection (Chapter 4, Section 3), and analysis of visitor spend and economic implications (Chapter 4, Section 4).

Chapter 5 details the results of data collected from recreation businesses. Within this, Sections 2 and 3 of Chapter 5 analyses those results, and considers associated economic effects. The analysis of both Chapter 4 and 5 is placed within the context of appropriate literature, enabling comparisons and a preliminary discussion to be made.

Chapter 6 comprises the discussion of the research findings, considering the findings with respect to the scale of tourism and visitor development, the importance of visitor spend for land managers, policy implications and the potential for clusters of recreation-based businesses. Chapter 6 further considers the development of nature-based recreation and leisure within the case study region through the concept of the tourist

area life-cycle (Butler, 1980). It notes the contribution of farmers as landscape managers within the wider, visitor market, concluding with a discussion on the potential contributions of nature-based recreation and leisure to the rural economy.

Chapter 7 provides a brief synopsis of the research findings and details the research conclusions, linking the findings and conclusions to the research framework developed within Chapter 2. In concluding the thesis, Chapter 7 offers recommendations for further research.

Supporting data is provided within appendices where necessary.



Photograph 2: Mattersey Priory, The Humberhead Levels.

Chapter Two: Literature review.

2.0.1. Introduction.

The nature of the research topic, and the various components that potentially interact within the research remit, have necessitated a wide-ranging literature review. As well as assessing literature related to nature-based recreation and leisure, factors associated with tourism development, rural policies and economics, and definitional issues have also been investigated. In respect of the potential for revitalising rural communities, much of the literature is based on tourism development. Within this, however, are multiple uses of terms that potentially lead to confusion and misunderstanding. These include alternative and seemingly contrary uses for terms such as 'tourist', 'visitor', 'nature-based' and 'eco-tourism'. Within related academic literature, for instance, tourism-related terms are used with specific meanings and in specific contexts. In practitioner and more general literature, tourism-tourist and visitor are often used interchangeably, and thus the academic distinctions are disguised. Much statistical data relating to rural tourism uses the terms 'day visits' and 'visitors' rather than 'tourist', adding to potential confusion. Further to this, terms such as 'local' and 'local economies' are used with no regard or description of what 'local' might actually mean. Thus much of the literature review has centred on developing an understanding of definitional issues associated with terms commonly used in relevant literature, but often with no explanation. From this, information and data obtained can be viewed within their original context and interpreted accordingly. The most appropriate definitions can then be applied to the research, thus providing clearer parameters and greater research focus.

Central to the research, matters of economics, rural policy and the development of tourism and visitor attractions based on rural landscapes have also been considered, with examples from the literature used to inform and assess the research. Benefits associated with development depend on the economic measurement of increases in income generation and employment, and the flow of money within an economy. Thus tourism and visitor literature has been reviewed to gain an understanding of the complexities of assessing any economic gains. Lastly, critical to any rural development is the attractiveness, or not, of the landscape as a back-drop for visitor activities. Thus the literature review also investigated the importance of landscape as a determinant in

visitor attraction, and the potential to increase visitor draw through appropriate landscape management.



Photograph 3: Sandtoft old road, The Humberhead Levels.

2.1.0. Section One: Tourism as a development option in rural areas.

2.1.1. A background to rural tourism development.

As leisure time and personal mobility increased within the UK population post-World War Two, rural policy and the war-related drive for agricultural production have been impacted by changes in the demands for countryside goods outside of agriculture (Hodge, 2001). Concurrently and assisted by agricultural intensification and rural policy giving a central role to farming, agricultural incomes increased following World War Two, only to fall sharply towards the close of the Twentieth century. Such declines and associated changes in agricultural policy and subsidy regimes are noted in a variety of sources (Stoate, 1996; Barnes and Barnes, 1997; Hodge, 2001; Countryside Agency, 2001b and 2004b; NFU, 2002). Although farm incomes experienced a slow recovery during the period 2000-2004, nonetheless, agriculture's overall contribution to the UK's economy continues to decline (Countryside Agency, 2004b). Lowland farm incomes once again declined in 2005 and are likely to continue to fall in 2006 (BBC, 2005). With many farms having diversified their income sources, including entering the tourism and visitor market, the effectiveness of this as an income generator is questioned (McNally, 2001; DEFRA 2004 and 2005a). Such low incomes, exacerbated by Common Agricultural Policy (CAP) reforms and changes in subsidy payments, reduces potential inward rural investment and thus impacts on rural community viability. In recognition of this, tourism as a growth industry (Alexander and McKenna, 1998) is noted as a development "*catalyst*" (Sharpley, 2002, p.233). As such, tourism is often presented as a means of stemming economic and social decline through diversifying income sources and increasing employment and income potential (Hansen and Jensen, 1996; Saeter, 1998; Fleischer and Felsenstein, 2000; Sharpley, 2000; Tyrväinen *et al.*, 2001; Wilson *et al.*, 2001; Sharpley, 2002a & 2002b).

2.1.2. Issues of tourism development as a development option.

Of concern to policy makers and described as a '*growth pole*' for economic development (Andrew, 1997. p.721; Williams and Shaw, 1998), tourism as a development tool is rarely questioned (Sharpley, 2000). However, the instigation of

tourism development is not necessarily a win-win situation, and thus requires consideration. Whilst offering an alternative income source, tourism, as a “*resource-dependant industry*” (McKercher, 1993, p.9.), makes demands and competes for resources with other local industries (Mazzanti, 2002). The demands of tourism can displace the demands of existing economies, with effects on employment and skills requirements. Commodity-based export industries can become service-based export industries through the instigation of tourism development. (Andrew, 1997; Zhou *et al.*, 1997; Fleischer and Felsenstein, 2000). As a provider of employment, tourism is said to offer unskilled, seasonal and part-time employment, often with low wages (Crompton, 1995; Fleischer and Felsenstein, 2000; Countryside Agency, 2001b; Wilson *et al.*, 2001). However, with many rural tourism businesses being family operated (Fleischer and Felsenstein, 2000; Rilla, 2004), and thus not necessarily employing non-family members, such issues may be of less relevance due to other factors, such as tourism income greatly assisting in the viability of family farms, or in undertaking a visitor business as a hobby or interest (Busby and Rendle, 2000; Nilsson, 2002; Rilla, 2004). Further to this is Law's (2002) observation that part-time, seasonal employment is preferred by some employees. With respect to urban tourism, Law (2002) also disputes the negative perception of tourism employment, suggesting that the often low-skill demands of tourism can be a source of employment for unskilled personnel in the vicinity of tourism initiatives. For employees however, tourism can leave them worse off if existing employment opportunities are displaced by tourism, although this depends on the nature of those existing opportunities. Tourism is also noted to impact negatively on the wider environment, through pollution and traffic (Herath, 2002), inappropriate development, excessive visitor numbers, and resource depletion. Such factors can create a negative image of a visitor destination, which can then suffer a drop in visitor numbers. Once tourism has become the economic mainstay of the region, having displaced former industries, then should it decline, the region will be poorer. The above considerations could present tourism in a negative manner. However, visitor, recreation and tourism development in conjunction with existing industries and development offers potential for regional income diversification, with income security enhanced through that diversification (Sharpley, 2002a).

2.1.3. Tourism as a catalyst for cluster development.

Further to the potential of tourism and associated visitor development to increase opportunities for employment and income generation, is the potential for tourism to stimulate a cluster development of associated and support businesses, and thus increase economic potential. As such, cluster development, tourism-related or otherwise, is viewed by policy makers as an important asset to the longevity and sustainability of economies (Brown, 2000; Carrie, 2000), with the development of tourism business clusters noted as an "*ideal way of supporting general economic development*" (Jackson, 2005, p.6). In this manner, the development of a cluster of tourism and recreation-related businesses has important considerations for the research with respect to visitor spend contributing to the economy of the Humberhead Levels.

Noted as a collection of interconnected stakeholders operating on the basis of mutual benefit and rivalry associated with an increased, collective economic presence, clusters enhance the development of skills and resources relative to the predominant industry, i.e. demand. In this manner, clusters represent the sum being greater than the parts (Porter, 1998; Ceccato and Persson, 2002). Such demands also raise employer expectations of employee education and qualifications. With industries, including tourism, relying on many facets of production, the skills and qualification base required can be broad, thus presenting increased opportunity and variety for employment and income prospects compared to a single, predominant industry. Further to this is the potential for links between clusters, i.e. agriculture and tourism clusters, and thus a trade in skills, products and concepts potentially exists (Porter, 1998; Carrie, 2000).

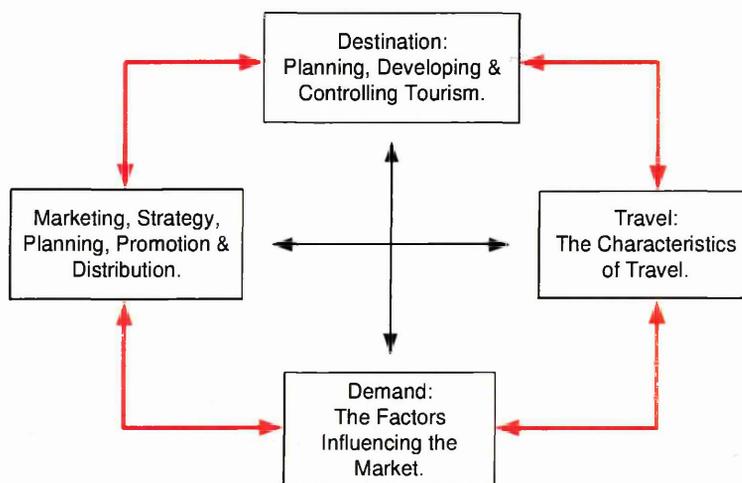
With business clusters likely to increase demands on infrastructure and services, any infrastructure improvements made are likely to benefit existing businesses and communities. With respect to isolated communities, cluster-related development can therefore reduce isolation from wider markets and opportunities (Jackson, 2005). Whilst not all cluster links are strong (Brown, 2000), nonetheless, with appropriate policy intervention and suitably targeted development based around existing or potential clusters (Porter, 1998), clusters have the potential to increase regional exposure and economic prospects. In particular, the concept of targeted, policy-derived cluster development noted within the literature (Brown, 2000; Carrie, 2000) has implications for the encouragement of recreation and leisure within regions of limited tourism and

visitor development. As such, collaboration between businesses and the potential benefits afforded to cluster development are important aspects of the research with respect to links between nature-based attractions and visitor demand.

2.1.4. The tourism system, policy and destination life-cycle.

Within the concept of tourism and associated tourism development is the concept of a 'tourism system' (Mill and Morrison, 2002; Leiper, 2004) as a system designed to maximise the benefits attributable to tourism and the generation of a visitor market. As such, a tourism system enables the tourism destination to exist and function, and the needs of tourists to be met. Comprised of numerous components and existing in various forms in an open, dynamic manner (Leiper, 2004), the tourism system is a stylised network of stakeholders with an interest in the destination region, and thus comprises factors of policy, demand, visitor destination development, marketing, infrastructure and visitors (Cooper *et al.*, 1998), Figure 1. Whilst tourism and visitor facilities may exist without a complete tourism system, such a system can enable a visitor destination to maximise visitor potential, and thus is an important consideration within the context of the research.

Although noted as a tourism system, as in Figure 1, the approach is not exclusive to tourists and tourism alone. It accommodates the range of visitors encountered within a visitor destination, including overnight staying visitors, day-trip and local visitors, and the accompanying infrastructure and support structures.



Adapted from Mill and Morrison, 2002.

Figure 1: Simplified Tourism System.

As a component of the tourism system, policy has potential for influence on the development of a visitor destination. In particular, funding streams often result from policy decisions, whether related to establishing visitor attractions, agricultural subsidies or business grant aid, for example. Such funding can be instrumental in or dependant on obtaining additional private funding (Law, 2002). In considering the establishment of publicly funded facilities, or "*pump priming*" (Law, 2002, p.50) visitor development, policy and its expectations can be conducive in the success or failure of a visitor destination. The demise and financial difficulties of high profile, publicly funded visitor attractions resulting from insufficient but expected visitor numbers, including the Earth Centre, Doncaster, and the Royal Armoury, Leeds (DCMS, 2001; BBC, 2004a), are noted. So are the consequences for research recommendations. As such, the potential and risks involved with developing high profile, 'flagship' attractions as a result of policy decisions are discussed further within the context of the research findings and discussion, Chapter Six.

Concurrent to the tourism system is the concept of the destination life-cycle and its various adaptations, adopted as it is from the product life-cycle (Butler, 1980; Cooper *et al.*, 1998; Higham, 1998; Massey, 1999). In conjunction with this is the concept of carrying capacity, both in an ecological sense (Liddle, 1997; Pigram and Jenkins, 1999) and in terms of visitor numbers (Hall and Page, 2002). Criticised for its rigidity and the limitations of its applicability (Agarwal, 1997), nonetheless the destination life-cycle as an illustration of the development and potential decline of a visitor destination, including nature-based attractions (Higham, 1998), has resonance with the research. In particular, with rural businesses noted as being family owned (Fleischer and Felsenstein, 2000; Rilla, 2004), and income retention within local economies being a research consideration, the life-cycle illustrates points at which visitor development may be most beneficial for rural communities. As such, the point at which visitor carrying capacity could be exceeded with respect to maximising local involvement and income retention can be determined. Such a point could also be related to the ecological carrying capacity. Should visitor numbers reduce populations of wildlife as the primary attractant, then the carrying capacity of the attraction in respect of visitor numbers can also be considered to have been reached through ecological impacts, the effects of such ecological damage often being difficult to initially assess (Pigram and Jenkins, 1999). Such observations and their impacts could be capitalised on and controlled respectively through the attraction of the most beneficial type of visitor. With Rotherham *et al.*

(2002b) indicating a propensity for niche and specialist visitor markets within the Humberhead Levels region, and the changes in visitor types classified by Cohen and Plog (as detailed in Ryan, 2003) as visitor destinations develop, there are opportunities to develop visitor markets to suit visitor types. Such factors have implications for policy and the development of the tourism system, noted above, and are discussed in greater detail in the context of the research findings, Chapter Six.



Photograph 4: Stainforth and Keadby Canal, Thorne, The Humberhead Levels.

2.2.0. Section Two; Tourism and definitions.

In everyday use of the English language, many terms and words are used without there being any acknowledged or agreed definition of that term or word. The actual meaning is often taken for granted, or is understood in relation to the context of the discussion, thus no formal definition is required. However, in the setting of research, an understanding of terms used is required to ensure results are placed in context and interpreted correctly, and that conclusions drawn are done so with reference to agreed definitions. Such definitional issues have been highlighted through previous work, with Rotherham *et al.* (2002b) noting the potential for leisure and recreational day visits as opposed to tourism visits, the difference of which, in the context of this research and the evaluation of economic impacts, is an important consideration. A discussion of terms relevant to the research is therefore detailed below.

2.2.1. Tourism, tourist and visitor: a confusion of terms.

Issues of tourism-related definitions receive much attention in the literature (Blamey, 1997; Sirakaya *et al.*, 1999; WTO, 2000; Pforr, 2001; Sharpley, 2002b; ETC, 2002). Much of this is concerned with what constitutes tourism, or a tourist, but also includes discussions of sustainable and eco-tourism. Difficult to define conceptually (Holloway, 1998), and with inexact terminology used in tourism discussions (Mathieson and Wall, 1982), there is no common definition or consensus of what tourism means or who a tourist is (Sharpley, 2002b). A variety of criteria are offered when definitions of tourism are discussed: a 24-hour, overnight stay must be included (Law, 2002; WTO, 2002), a tourist must travel at least 50 miles (80km) from their home to be considered a tourist (Kelly, 1992), a person must be outside their 'usual environment' (WTO, 2000). To be outside their usual environment, a minimum distance travelled of 160km (100 miles) is suggested by the World Tourism Organisation (WTO) (den Heedt, 1994, in Smith, 1995).

Such criteria are exclusive in their nature, and the potential confusion surrounding the differing terms is noted by the Countryside Agency (2000). Whilst the WTO does include the term 'visitor' to account for day-trips, it seems that to be a 'proper' tourist, and therefore have your economic impacts considered, then you must meet the requisite

criteria. However, in considering the economic impact of visitors to a region, the terms tourism and tourist do not seem sufficiently inclusive. The exclusion of day visits from the study would greatly reduce the assessment and scale of economic impacts, as noted by Smith (1995) and Flognfeldt (1999), and further illustrated by the English Tourism Council. 1.3 billion leisure day-visits taken in the English countryside per year, at an average spend of £15 per visit (ETC, 2001), equate to a total of £19.5 billion day-visitor spend. In addition to this, the Countryside Agency (2000c) note that of all UK countryside regions, only one (Cumbria) receives a more significant income from overnight staying visitors than day-visitors, and that day-visitor spend accounts for 77% of all UK countryside visitor spend, rising to 90% for attraction spend. Little wonder then that Law (2002. p.60 & 59) suggests that "*The leisure day-trip market is enormous*", and represents a "*significant*" contribution of income to local economies. Downward and Lumsdon (2000 & 2003) further discuss the spending of day-visitors and the marketing for them, whilst the Countryside Agency (1999c) periodically conducts surveys to determine the impact of leisure day visits. As such, the contribution of day visits to local economies is potentially great and increasingly recognised. Thus, in this respect and in consideration of visitor types indicated by Rotherham *et al.* (2002b) within the case study region, the adoption of an appropriate, inclusive term within the research context is considered paramount.

In considering the range and usage of tourism and visitor-related terms within the literature, and as a result of the potential for confusion in using such terms within differing contexts, it is therefore considered that 'visitor' is the most appropriate term with respect to the study. The more common, non-specific use of 'tourism' and 'tourist' within everyday, public use compared to their more specific academic and tourism industry use suggests 'visitor' as a more apt and encompassing term, enabling fuller visitor impacts to be considered. Thus, in the context of the study and to avoid confusion, 'visitor' is used to refer to both day visits and longer stays, thereby encompassing tourism-tourist, in the manner of the Countryside Agency, (2000c). Where tourism-tourist are used within the text, it is done so in a more general context. The academic context of tourism-tourist is not implied unless specifically noted.

2.2.2. Defining and considering sustainable tourism in the rural context.

If tourism develops with little consideration for its potential negative impacts, then it may be short-lived. However, authors frequently discuss tourism in terms of sustainable tourism, and what is meant by sustainable tourism as a continuum of sustainable development (Bramwell and Lane, 1993; Eagles, 1995; Harrison, 1996; Wight, 1997; McCool *et al.*, 2001). Newsome *et al.* (2002, p.10) introduce the term '*alternative tourism*' as a concept of a more sustainable and locally beneficial form of tourism. As a wider issue, sustainable development, as defined in the Bruntland Report (WCED, 1987), has been described as conceptually ill-defined and multifaceted (Stabler and Goodall, 1996). With over 300 'definitions', sustainable development is often interpreted to fit the aims, objectives and opinions of differing disciplines (*ibid.*; Heinen, 1994, in Sharpley, 2000). Similarly, sustainable and nature-based tourism definitions suffer the same confusion (Briguglio *et al.*, 1996; Sirakaya *et al.*, 1999). Political and ideological beliefs, and personal attitudes and values, will influence perceptions and definitions of terms such as sustainable, nature-based and eco-tourism, even to the extent of producing discordant perceptions and definitions (Sharpley, 2000; Pforr, 2001).

There are many definitions of sustainable tourism (Bramwell and Lane, 1993; Forsyth, 1996; DCMS, 1999; ETC, 2002). Whilst some definitions are inclusive and consider economic, social and environmental factors, others appear to be concerned with sustaining tourism alone, being less concerned with environmental and social resources. McCool *et al.* (2001) ask, what should tourism sustain? With respect to the longevity and sustainability of rural economies, whilst tourism is presented as a means to stem rural economic decline (Walford, 2001), sustaining a tourism development for the sake of tourism alone will not suffice. Income generation based around service and commodity demand through the import of visitors should be the premise for tourism development (Saeter, 1998). It is important that that income generation benefits and thus helps sustain local economies. Appropriate tourism development, rural or urban, will ensure that the benefits of tourism are spread throughout the host community, and that the environmental resource is maintained, thus providing long-term income sources for local populations. As Busby and Rendle, (2000), Nilsson (2002) and Rilla (2004), observe, rural tourism and visitor income help maintain farms. In turn, farms maintain

the wider landscape and an attractive countryside - "*the single most important resource for English tourism in both domestic and overseas markets*" (Rilla, 2004. p.15). Thus, within the context of the research, sustainable rural tourism has potential to sustain not only farms and associated rural economies, but also the wider landscape. With respect to sustainable tourism, therefore, sustainable rural tourism has implications for the wider UK as a visitor destination. The sustainability of rural tourism therefore has greater implications than rural aspects alone (Rilla, 2004).

2.2.3. Nature-based and eco-tourism; ill-defined cousins?

Nature-based and eco-tourism are terms that are frequently used together, interchangeably, as sub-sets of one another (Orams, 1995; Preece *et al.*, 1995; Lee, 1997; Blamey, 1997; ACT, 2000; SCNBTa, 2002), or in association with wildlife and alternative tourism (Fennell and Weaver, 1997; MacLellan, 1999). As Brandon (1996, p1) notes

"there is no standard nomenclature.....and much of the literature fails to differentiate between nature-based mass tourism and nature-tourism, which is small and limited".

Consequently, confusion and opposing views are common, with no set definitions, particularly in respect to eco-tourism (Blamey, 1997; Sirakaya *et al.*, 1999; Herath, 2002). In any case, definitions will depend on perspectives (Pforr, 2001). Blamey (1997) questions whether a drive through a forest is a nature-based experience, and does this include driving through an un-natural, plantation forest? Much of the literature has a bias towards eco-tourism, with nature-based tourism in its own right receiving less attention, particularly in academic journals. Authors agree, however, that both nature-based and eco-tourism occur in natural or near-natural environments, and have a consideration for local community viability (Fennell and Weaver, 1997; Wight, 1997; ACT, 2000; Newsome *et al.*, 2002; SCNBTa, 2002).

MacLellan (1999) comments that nature-based and eco-tourism labels have been used excessively to hype the 'green' tourism market, as marketing tools and buzz words (Sirakaya *et al.*, 1999; Pforr, 2001). The often incompatibility between ecological

practises and tourism profit motives within eco-tourism is also commented on (Sirakaya *et al.*, 1999), as is the mis-representation, or 'green-wash' of ecological credentials of some tourism enterprises (Wight, 1997; McLean, in Lindsey, 2003). Eco-tourism is indeed noted as a high-growth tourism sector (Higgins, 1996; Pforr, 2001; Herath, 2002), and as "*one of the fastest growing sectors of the tourism industry worldwide*" (WTO, 2003, in Gibson *et al.*, 2003, p.324), if a niche market (Bell and Lyall, 2002). Similarly nature-based tourism (Stucker Rennicks, 1997; McKercher and Robbins, 1998). However, Preece *et al.*, (1995) show surprise that such time and resources are given to eco-tourism, what they consider a relatively small component of tourism. Brandon (1996, p.35) comments that

"in most cases ecotourism and nature-based tourism have not lived up to expectations....in creating revenues for conservation",

a quote that is reduced to

"in most cases ecotourism has not lived up to expectations"

(Anon., 1999a. p.22).

Nature-based tourism is also considered to include adventure tourism, encompassing what has been described as 'hard' (wilderness trekking, bush walking) and 'soft' (scenic driving, nature reserve visits) nature-based experiences (Potts and Rourke, 2000; ACT, 2000). Further activities noted as being within the concept of nature-based tourism include skiing, off-road driving, picnicking, hunting, camping and boating (Shafer and Choi, 2005). Stucker Rennicks (1997) suggests nature-based tourism has "*come of age*", and comprises of those who specifically seek 'green', cultural and natural tourism experiences, and mainstream tourists enjoying nature-based experiences in conjunction with their main holiday. Regardless of individual beliefs, the number and variety of stakeholders involved in nature-based and eco-tourism make clear definitions difficult to establish (Pforr, 2001).

2.2.4. 'Local': a discussion of definitions.

In discussing the potential effects and impacts of any development, the term 'local' is often used; what will the effects be on the local community, environment, economy and so forth. Television reports, printed media, academic journals, and bar-room talk all use 'local' in one context or another. To those listening or reading an article, 'local' requires no further definition. It is assumed that its meaning is understood, and the actual meaning rarely questioned. However, a blanket acceptance of an undefined term offers potential for misunderstandings. Local in a UK wide or global context is not the same as local to a small, rural community. Local to a strategically thinking administrator may have a quite different meaning to parish councillor or local population affected by a development. Indeed, what is meant by 'local community' or 'Local Authority' when such authorities vary in size considerably (NSOL, 2004)? Thus in assessing the potential for nature-based leisure and recreation in rural communities, and introducing the concept of 'local' in terms of visitors, economies, impacts and communities, an explanation of what is meant by 'local' is required.

2.2.4.1 Questions regarding 'local'.

Aside from a dictionary definition, which in itself can entail several different meanings (Chambers, 1995), what is meant by 'local'? Is 'local' a fixed distance from an area of reference? Is it defined by physical barriers, e.g. rivers or mountains, or administrative boundaries? Does 'local' relate to the time spent travelling to a 'local' destination? If so, is that on roads that are free of traffic, on a motorway with high average speeds, or two-lane rural roads with low average speeds? Does the definition of local depend on whether a person is travelling by car, cycle or on foot, or even by aeroplane? From time and cost perspectives, budget airlines can deliver passengers to Europe in less time than many commuters spend travelling to work and back. Furthermore, is 'local' in an urban context the same as local in a rural context, where distances between destinations and services are increased?

With respect to economic factors, at what point do economic effects cease to be local? A business pays employees who spend wages in their home town, 'local' to the business or otherwise. Businesses pay tax to local authorities who then distribute the tax revenue over a wide area. Taxes are also paid to central government, which then redistributes tax

revenue nationally, including the region in which revenue originated. Consequently, those responsible for the collection and distribution of funds will have a different understanding of 'local', depending on the scale of their responsibilities. Economically then, does 'local' include an individual business, a small community, a town, county or region?

If a development is likely to affect local communities, how is 'local community' defined? How far can wind-borne pollution be carried before it ceases to affect 'local' communities? Likewise, if increased local traffic is a cause for concern, at what point does that traffic leave the locality, and what about the 'local' people affected by the same traffic in areas further away from the development? How local is 'local'? Is a physical, socio-cultural or economic impact a prerequisite of 'local'? If it is enough to know that a development is negatively affecting the Environment without ever seeing or being physically affected by the same development, and that causes an individual concern, then we enter the realms of existence value. 'Local', therefore, takes on a global, 'one-world' context. As philosopher Rene Dubos surmised, '*think globally, act locally*' (Hayward, 2001).

2.2.4.2. Literature and the use of 'local'.

Clearly, 'local' requires defining in a manner suitable for the context in which it is used. A review of academic journal articles indicated that whilst 'local' is used in numerous contexts, from tourism, ecology, energy production, economics and medicine, as examples, few articles detailed what was meant by 'local' in relation to their subject matter. Of those that do, there is no clear or accepted definition, an observation noted in Enteleca (Undated) in discussing tourist attitudes to local foods. Thus the interpretation of 'local' is left up to the reader.

Accessing official, UK Government literature reveals no standard definition or distance of 'local', instead presenting nebulous, non-specific descriptions (Douglas, 2001; Brook, 2004), although Hastings (2004) implies some limit of distance by linking places of residence to places of work to identify self-contained local labour markets. Human and social geography texts are similarly nebulous in their definitions of 'local'. Daniels *et al.*, (2001, p.511) suggest 'locality' is a "*place or region of sub-national spatial scale*", thus suggesting a similar definition for 'local'. Holloway and Hubbard (2001, p.27) note that

the average UK citizen travels 18 miles per day, with an implication that this distance, or "*activity space*", has some connection to an individual's conception of local. Further to this conception, the onset of globalisation and rapid communications is noted as having an impact on what is meant and considered by 'local'. MacDonald's and 7-Eleven stores can be found 'locally' and worldwide, whilst foreign culture and wildlife can be accessed through television, film and printed media within a person's own home (Aitchison *et al.*, 2000; Holloway and Hubbard, 2001; Daniels *et al.*, 2001). In this context, 'local' and similar descriptive terms of scale, i.e. regional, whilst short of specific, distance related definitions, appear to be a "*social construct*" (Sayre, 2005, p.283), and thus personal to the individual or relative to the organisation in question, i.e. Local Authority.

2.2.4.3. The use of 'local' within a tourism context.

Tourism development and the encouragement of visitors to festivals are often noted as a means to regenerate communities and provide local employment and income (Hjalager, 1996; Lee, 1997; Hall and Jenkins, 1998; Fleischer and Felsenstein, 2000; Wilson *et al.*, 2001; Sharpley, 2002a; Gursoy *et al.*, 2004). Of articles that refer to the impacts and benefits associated with tourism development on local communities, what is meant by 'local' is not explained. Similarly, in discussing cooperatives and local development, Lorendahl (1996) refers to the local benefits resulting from the establishment of cooperatives, particularly those associated with tourism. Local employment, local infrastructure, local suppliers and contributions to local economies are all noted as recipients of the benefits of cooperative development. 'Local' itself, however, is not defined. It is assumed to relate to the local area encompassed in the Swedish study. As Lorendahl (1996) notes, however, with respect to supplier purchase, difficulties exist in classifying a purchase as local, regional or national. Thus where the benefit is received is open to question. Furthermore, cooperatives studied by Lorendahl have large interest payments. Financial institutions in this instance are regionally based, thus local benefits become regional benefits. Whilst the term 'local' is used in many instances, the meaning is implied, and the definitions diffuse.

2.2.4.4. 'Local' in an employment market context.

The lack of clear definition of local extends to employment studies. Eargle (1997) notes that American Labor Market Area data is used to define local labour markets by reason of an individual's place of work being in the same area as their place of residence, in a similar manner to Hastings' (2004) use of 'travel to work areas' and self-contained local labour markets. Within the context of local as used by Eargle (1997), the use of 'local' is extended to include those living in areas surrounding a city whilst working within the city. The use of a non-defined area and areas surrounding cities adds an element of uncertainty. Whilst it could be assumed that city boundaries provide the limit to local labour markets, the variety of sizes of American cities leaves room for much interpretation.

2.2.4.5. The intangible, administrative and physical boundaries of 'local'.

This ambiguous definition is further noted in discussing neighbourhoods, a term associated with 'local'. In studies conducted in Oakland, California, Altschuler *et al.* (2004, p5) note that 'neighbourhood' can be described as a "*block or less, as well as a much larger area*". Boundaries are often associated with historical, cultural, community and commercial factors, often in conjunction with administrative boundaries. Furthermore, class and perceptions of crime rate and lower-income within an area can all provide boundaries for neighbourhoods. Intangible considerations such as levels of trust and "*feelings of belonging*" are also presented as factors in defining neighbourhoods (Altschuler *et al.*, 2004, p5). The use of loosely defined terms in conjunction with 'local' is further apparent in Robertson and McGee (2003). As well as providing a distance factor (10km), 'local' was also attributed to interviewees who had lived, worked and regularly visited a wetland study area in Victoria, Australia.

Witkowski *et al.* (2003) note the difficulty of defining 'local community' with respect to e-retail communities and the purchase of products. Geographical, social and political boundaries are noted as factors in defining local communities. Within these constraints, the land area and population may vary considerably. Similarly to Altschuler *et al.* (2004), neighbourhood is given as one example, with village, town and county also presented as representing local communities. Beyond this, Witkowski *et al.* (2003, p.8) suggest that "*'local' begins to seem untenable*". Furthermore, and in respect to the purchase of products in-store, Witkowski *et al.* (2003, p.9) offer a working definition

encompassing a business' "*catchment area*", i.e. "*the population from the area that would normally use that business*".

Kaldellis (2004, p.3) notes that local people, encouraged by local authorities, were hostile to wind-farm development "*in their territory*" (in Greece). The use of 'territory' introduces a further aspect to the meaning of local, as in 'local' people and 'local' authorities. What is meant by 'territory'? Is 'territory' a greater or lesser land area than 'local' in this instance, or is it simply a Greek administrative term for a variety of land areas? Considering the differences in land area, 'local' in the contexts of the Canadian North-west Territories and the Australian Northern Territory is surely different than that in the considerably smaller Australian Capital Territory and Greek territories noted by Kaldellis (2004). Thus the influences of physical space, national and political culture will also have a bearing on what is meant by 'local'.

2.2.4.6. Defining 'local' through physical distance.

Some authors and organisations provide an indication of distance in discussions of 'local' issues. Survey respondents all lived within 20km of wind-farms (Kaldellis, 2004). Similarly, interviewees in studies of oral knowledge on wetlands lived within 10km of the wetlands in question (Robertson and McGee, 2003). The RSPB, in conducting visitor surveys, defined local as within 20 miles of an RSPB reserve (PACEC, 2004). The National Association of Farmers Markets (NAFM), with respect to the sale of local produce at farmers markets, suggest 'local' as being within a 30-mile radius of the market, or 50 miles for large cities and coastal regions. Furthermore, NAFM comment that 'local' may also be defined by county or geographic boundaries, adding a recommended 100-mile limit as the maximum distance a producer should travel to attend a farmers market (NAFM, 2002). Selby District Council place a 50-mile limit on stall holders at farmers markets as a method of maintaining a regional identity and benefiting the local area (*Survey data*). However, considering the purchase of local products, the introduction of regional products can blur local identities. In respect of buying local products, therefore, consumer's understandings of 'local' can be ill-defined (Enteleca, Undated). The South West Local Food Partnership suggests that within 30 miles is the limit of 'local', without actually giving a definition of 'local' (SWLFP, 2003), whilst Broadbridge and Calderwood (2002, p397) define local shoppers as "*those*

travelling less than one mile for their main shopping". In the context of their rural, Scottish study, however, one mile seems a little constrained.

2.2.4.7. Considering the meaning of 'local' in locally produced goods.

With respect to 'locally produced or made', what is meant by 'local'? Does it mean locally manufactured? If so, it is possible that all the ingredients and component parts may actually be imported, and be anything but local, with a consequential lessening of local benefits due to the import of components and export of funds. Or does it mean goods produced locally from locally sourced ingredients and components? In which case the benefits of the purchase of local ingredients and components and the local production of the product means a higher retention of income in the local area. Furthermore, what about goods that are comprised of local products and materials, and sold in that locality, but are actually made elsewhere and re-imported, the component parts having been exported to some distant place for assembly?

With the economic considerations implicit within the manufacturing and sale of goods, including tourism 'goods', it could be expected that economic literature, particularly that supporting tourism development as a local economic benefit, would contain more specific definitions of 'local' and its applications. Yet whilst referring to local authorities, local economies, local employment, benefits to local residents or cities and so forth (Crompton, 1995; Harvey, 1996; Lee, 1997; Black, 1997; Saeter, 1998; Crompton *et al.*, 2001; Egan and Nield, 2003), definitive descriptions of 'local' are missing. Whilst allusions to spatial descriptions of 'local' are made, these are similar to the nebulous descriptions found within UK Government literature (Douglas, 2001; Brook, 2004).

In reality, many 'local' products will be a combination of local and non-local components, and thus the associated economic considerations are more difficult to assess on a local level. How many jam producers make their own glass jars? In brewing beer, where have the hops and malted barley, and indeed water, originated from, not to mention refined sugar, preservatives or packaging? Perhaps the critical factor is the addition of extra value to products or components undertaken within the local area, irrespective of their origin, which are then sold locally. To this can be added the scale of local involvement and local benefits, rather than the exclusivity of being '100% local'. Locally grown fruit and vegetables can no doubt be sold as 'locally produced', but inputs

to growth, such as pesticides, fertilizers and diesel will have been sourced from around the globe.

It could be argued that with the size of the UK, and the ease in which goods can be transported outside of their region of production, that local, UK produced goods will only ever make up a small percentage of total goods sold. Whilst this may be correct, even comparatively insignificant revenue raised through the sale of local goods may be vital to the maintenance of local services and suppliers. Such revenue may also precipitate further, local employment opportunities. Local employment may encourage inward migration, and the requirement for the schooling of children. The addition of even small numbers of children to a local school may prevent the school closure. Even small increases in local revenue may be instrumental in the maintenance and viability of local communities (Lorendahl, 1996). If visitor facilities are established to provide income diversity in rural locations, and if income from these facilities is maintained within the local community, how important is it where 'local' products are made?

Consequently, the idea of 'local' greatly depends on the scale of the locality under discussion; district, regional, national or international? Village, town, city or megalopolis? (Gottmann, 1961). In turn, this has a bearing on the retention, import and export of funds. It affects how these can be accounted for, and the level at which funds raised through the sale of 'local' products can be described as 'new money' in a region. Thus economic factors require consideration.

2.3.0. Section Three: Economic impact analysis.

The beneficial economic impacts of tourism, whether mainstream, nature-based or eco-tourism, are often noted in the literature with respect to development and policy (Hall and Jenkins, 1998; Saeter, 1998; Frechtling and Horváth, 1999; Fleischer and Felsenstein, 2000; Sharpley, 2000). These include employment creation, inward investment, regeneration, and diversification. However, tourism impacts are not all positive (McKercher, 1993; Lindberg and Johnson, 1997; Wilson *et al.*, 2001), and the extent to which rural tourism benefits are realised is debated (Sharpley, 2002a). As examples, the employment benefits of tourism are questioned (Brandon, 1996; Leiper, 1999), as is the level of economic leakage from tourism areas through imports of goods and export of finance (Brandon, 1996). Questions asked of tourism development also include issues of opportunity cost. Is tourism the most appropriate development and will it affect existing industries? What else could have been developed for a similar investment? Could funds have been better spent elsewhere? (Andrew, 1997; Saeter, 1998; Hudson, 2001; Mazzanti, 2002).

Negative impacts, such as traffic, pollution and demands on resources will also require consideration in any economic analysis: so will development, marketing, maintenance and opportunity costs forgone. Thus the economic benefits of tourism will depend on the data included in economic analysis. Care should be taken to include all relevant data. Such non-market factors require consideration within a full economic analysis (Lindberg and Johnson, 1997; Lee, 1997; Mazzanti, 2002). As such, non-market benefits are noted but not considered in this research. The more direct economic impacts being primarily considered in the research focus.

2.3.1. The use and inclusion of economic data in economic studies.

The aim of an economic analysis is to assess the economic effects that result from development (Crompton, 1995). Many aspects of tourism are 'non-market' goods, and thus have no obvious or identifiable financial value. How is a 'landscape view' valued financially, and what is the value of 'quietness', for example? Methods such as willingness-to-pay and contingent valuation have been developed to assist in such

esoteric valuations (Lindberg and Johnson, 1997). Regardless of any value, the methods used and data collected must be as accurate as possible to facilitate reliable economic projections (Yuan, 2001).

Several views on what data to include in economic assessments are present in the literature. Only 'new money', that is, income from outside the study region, should be included in assessments, according to Crompton (1995) and Hudson (2001). Spend by local residents is simply recycling existing money, and its inclusion will inflate economic benefit assessments. Similarly, money spent at one attraction rather than at another attraction in the same region should not be included, as this is simply a substitution of, and not an addition to, local funds (Crompton, 1995; Hudson, 2001). Yu and Turco (2000), however, suggest a special event may encourage greater spending by local people, and this expenditure should be included in analysis. Studies by Rotherham *et al.* (2002a) have shown that local people make use of local attractions, and that it is perhaps the attractions that keeps money within the region. Without the attraction, income may be lost or 'exported'. Such considerations are therefore critical to the research with respect to local community viability through income retention. As Hansen and Jensen (1996) suggest, holidays spent at home compete with imports or holidays elsewhere. Holidays at home therefore have economic impacts that require consideration. Thus the argument exists for the inclusion of local spend in economic impact studies, which may otherwise underestimate economic impacts (Yu and Turco, 2000).

Crompton *et al.* (2001) suggest that it is the financial return to local residents that is important in development. Their taxes, through public sector organisations, have in many instances subsidised development. Hudson (2001) comments that economic returns to public sector organisations are also important. Tax revenues help maintain local infrastructures. Within the UK, this will include business rates paid to local authorities. The retention of income within a region is important to maximise economic benefits. The 'leakage' of income out of a region lessens local benefits, and can occur through the import of goods, employees, and export of finance. Large, remote interests can often receive the greater financial benefits (Higgins, 1996; Yu and Turco, 2000). However, with rural recreation businesses being noted as locally operated and family run (Fleischer and Felsenstein, 2000; Rilla, 2004), there is a greater propensity for economic benefit to be maintained within the local community. In this respect, an

understanding of the potential income generation by such businesses is considered important within the research.

2.3.1.1. The potential misrepresentation of economic-related data: motives and FTEs.

Several authors comment on the need for careful interpretation of analysis results and data. As well accidental bias introduced through personal interest, time and costs considerations, or lack of awareness, bias can be deliberately introduced. Results can be presented to achieve or present a specific outcome (DoE, 1990; Crompton 1995; Leiper, 1999; Yu and Turco, 2000; Crompton *et al.*, 2001; Hudson, 2001; Yuan, 2001; Shibli, 2004). Such actions reduce the effectiveness of economic analysis, and in association with tourism, decrease the effectiveness of tourism as a method of regeneration (Crompton *et al.*, 2001). In considering nature-based recreation and leisure as factors of rural income generation, such observations clearly have implications for economic data collected and analysed during the course of the research.

Further to income generation, with potential tourism employment being regularly noted (DoE, 1990; Hall and Jenkins, 1998; Saeter, 1998; Leiper, 1999; DCMS, 1999; Rayment *et al.*, 2000; Sharpley, 2002b; WTTC, 2003), the presentation of employment figures is also important with respect to the research considering employment potential. Hansen and Jensen (1996) suggest that tourism employment figures presented by the World Travel and Tourism Council (WTTC) with respect to Denmark are of little, if not negative, value, such is the scope of the WTTC calculations. The use of Full Time Equivalent jobs (FTE) as actual jobs, as opposed to fractions of jobs combined into one figure, has been presented as one example of potentially misleading information taken up by the media and presented *de facto* to the general public (Leiper, 1999). Furthermore, the use of FTE can disguise the source of employees, with implications for the retention or leakage of income associated with wages. With many rural businesses being family concerns, and thus 'employing' family members (Fleischer and Felsenstein, 2000; Rilla, 2004), 'employee' numbers are reduced in any case, and thus an important consideration for the research and potential employment market. Further to this, employees that commute into the tourism region 'export' their wage, and thus lessen any local economic benefit (Crompton *et al.*, 2001). Crompton *et al.*, also note that, in estimating employment in future developments, employment capacity may be taken up

by existing staff working longer hours, not by increased employment. Similarly, if the local employment market is at full capacity, then employees will require importing, lessening local benefits.

2.3.2. Reviewing economic impacts and the use of economic multipliers.

In considering economic effects, appropriate economic multipliers and models are needed to assess the flow of money within an economy, and the economic effects generated. The literature testifies to the continued debate on the most appropriate methods of assessing economic effects, and of suitable economic multipliers. These include the use of input-output tables with their high data demand (Zhou *et al.*, 1997; Frechtling and Horváth, 1999), income multiplier models to assess links between regions associated with domestic tourism (Eriksen and Ahmt, 1999), and a computable general equilibrium model for assessing tourism's impacts and links between sectors (Zhou *et al.*, 1997). With respect to multipliers, discussions range over the merits of income and sales multipliers (Crompton, 1995; Hudson, 2001), and the ratios of multiplier to use, with multiplier ratios being affected by income leakage (Brandon, 1996; Frechtling and Horváth, 1999). High multiplier ratios suggest a lower level of income leakage, and therefore a greater benefit to local residents (Lee, 1997) as money stays within the local economy longer. Low multiplier ratios suggest the opposite, with similar affects applicable to employment multipliers. What ever method is chosen, however, it is important that all relevant data is considered and appropriate multiplier selected, including accounting for the often negative, non-economic effects. If models and associated multipliers ignore relevant factors, tourism's net social benefits can be over estimated (Lindberg and Johnson, 1997). The importance of this is noted by Brandon (1996) with respect to employment potential. The use of inappropriate multipliers in early tourism studies have given lie to the "*erroneous belief*" (Brandon, 1996. p.24) that tourism development provides a high levels of employment.

Numerous studies are concerned with and detail data from day and mixed-length visits (Countryside Agency, 1999c; Flognfeldt, 1999; Downward and Lumsdon, 2000 & 2003; Forestry Commission, 2003). In common with these, and with respect to this study, the selection of an appropriate multiplier ratio will ensure that day-visit data are accounted for correctly, with results pertinent to the research aims of assessing visitor

economic contributions. In assessing potential economic effects, and in consideration of the debate within literature on economic multipliers, this study applies official, UK Government standard economic multipliers (English Partnerships, 2004). By doing so, economic impacts associated with the study are thus linked to UK Government documentation, and thus present a level of coherence with other economic impacts studies within the UK adopting similar multipliers. This is considered the most appropriate and pragmatic way to proceed.



Photograph 5: Wroot Church, The Humberhead Levels.

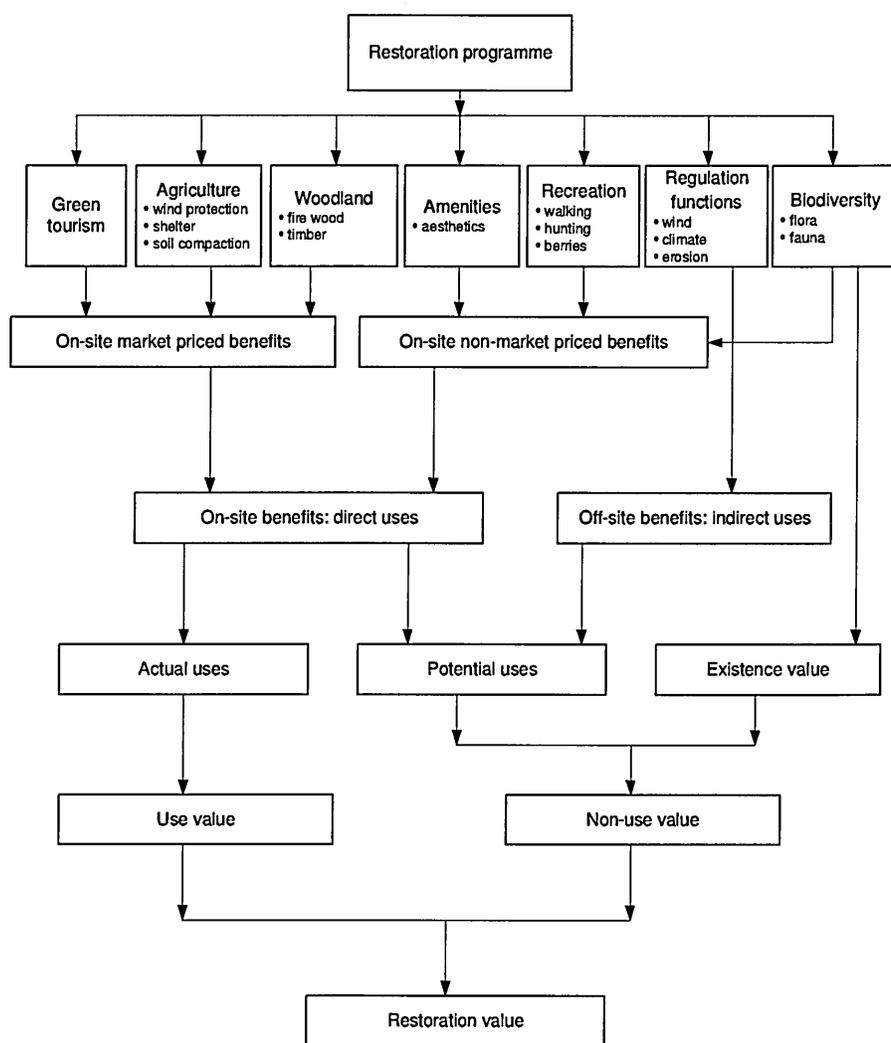
2.4.0. Section Four: Valuing wildlife and the environment.

Until the latter half of the Twentieth Century, wildlife and the environment have received little attention in terms of intrinsic, economic value. Lee (1997) suggests, with respect to tourism, that the economic value and benefits of natural resources in the long-term are often disregarded. Shorter-term development occurs at the expense of degrading the environment and losing associated natural resource tourism benefits. Pearce and Turner (1990) note an area of wetland can be valued for its development potential, but the conservation value has no readily identifiable market value or expression, i.e. there is no market for the 'product'. Indeed, what is the product? As such, the intrinsic value of a wetland could be considered valueless. Valueless, however, does not equate to worthless or priceless. Schouten (1990) notes nature has a price that is often overlooked as nature is not normally valued in socio-economic terms. Hummelink (1990) comments that the market value of a commodity depends on its scarcity. Thus nature, as an increasingly scarce commodity, has acquired an economic value.

Studies conducted by the RSPB (Rayment *et al.*, 2000; Rayment and Dickie, 2001) have illustrated the economic importance of wildlife reserves, as have studies by Rotherham *et al.*, (2002a & 2002c). Such studies illustrate the importance of visitor spend at and in the vicinity of wildlife reserves, and thus represent a market value attributable to wildlife. Work undertaken by Cranfield University (1997) has also attempted to place a value on fen landscapes as compared to existing agricultural practises, thereby considering alternative market values and products. Hummelink (1990) details American studies that show a higher value for wetlands in their natural state than for development options. Bonnieux and Le Goffe (1997) provide examples of the public benefits of landscape restoration. These include non-market priced items of free amenity and recreational use, biodiversity values and an overall improved environment. Also considered are non-use values of existence and bequest, Figure 2. Where socio-economic values have been placed on nature, over the medium and longer term, they are often greater than expected. The return on investment on developments that destroy such natural capital is far from certain (Schouten, 1990). As an example, with the protection and storm-surge buffering effect of Louisiana coastal wetlands reduced through drainage and development, the value of such natural capital is presented in contrast to the damage occurring within New Orleans as a result of Hurricane Katrina in

2005 (Hirsch, 2005). Thus, in contrast and in considering the maintenance of the natural capital, including wetlands, conservation, note Fish *et al.*, (2003), is an investment. And so Herath (2002. p.86): "*Nature tourism is a good investment*".

In considering approaches to environmental and the natural resource valuation, the research necessitates an inclusive approach. In particular, this values the potential benefits associated with nature-based recreation and leisure, and their environmental base. An increased awareness of environmental issues has brought more holistic approaches to environmental management to the fore. This is evidenced by the plethora of environmental regulations emanating from the European Union. A range of literature exists with respect to land and water management and an appreciation of wetlands, and informs the research (Purseglove, 1988; Giblett, 1996; Stoate, 1996; Cranfield University, 1997; MacFarlane, 2000; Clay and Daniel, 2000; Environment Agency, 2002; Fish *et al.*, 2003; Anon., Undated; Raeymaekers *et al.*, Undated). The different perspectives presented by this literature illustrate the differing 'values' of the literature themes. For example, integrated water management concerns the Environment Agency, whilst the natural history, historical context and conservation of wetlands concern Purseglove (1988), Giblett (1996) and Raeymaekers *et al.* (Undated). Thus whilst the potential economic and financial value of nature-based visitor attractions is one concern of visitor development, other values also require consideration. Such varying values and the interrelationship of the values discussed above are illustrated in Figure 2 with respect to landscape restoration values (Bonnieux and Le Goffe, 1997).



Source: Bonnieux and Le Goffe, 1997.

Figure 2: Illustration of the benefits of landscape and wetland restoration.

With respect to the current research and Figure 2, the factors illustrated provide an indication and direction for the research, illustrating the importance of both market and non-market uses and values. Although the research is primarily concerned with the market values attributable to nature-based recreation and leisure, the non-market values will need to be considered. As Bonnieux and Le Goffe (1997) indicate, the market and non-market values are interlinked and thus should not be viewed in complete isolation, as ultimately they produce the restoration value and wider economic benefits. As such, the combined factors illustrated in Figure 2 inform the central 'destination development' factor identified within the research framework, Figure 4.

2.5.0. Section Five: Issues of landscape perception.

The literature review highlighted several factors regarding public perceptions of and preferences for landscape types. Destination images, aesthetically and in anticipation, can be more effective in raising visitor interest than factual information (Ross, 1998). They may therefore be critical to tourism and visitor initiatives, even if the image is less than correct. Such issues are of importance to the research. The principal research study region of the Humberhead Levels is a low-lying, agriculturally intensive and formerly wetland area, and not normally considered a visitor destination but with visitor potential indicated by Rotherham *et al.* (2002b). Any visitor development within the region will require an understanding of the Public perception of the Humberhead Levels landscape upon which to capitalise.

2.5.1. Low-lying, wetland landscapes and factors in public perception.

In general, wet and low-lying landscapes, such as the Humberhead Levels prior to agricultural drainage, have been portrayed negatively for many generations. They are seen as places of disease, of evil, of resistance to authority, and areas to be controlled (Rackham, 1986; Purseglove, 1988; Caufield, 1991; Giblett, 1996; Múgica and De Lucio, 1996; Countryside Agency, 1999). In some countries, this is still so (HRW, 2003). As Giblett (1996) notes, numerous authors have presented wetlands in an unfavourable manner. Thus a “*cultural label which said 'worthless'*” was applied to such landscapes (Raeymaekers *et al.*, Undated. p.1). The drip feed of bad press and lower status afforded to wetlands by designating aesthetically pleasing upland regions as worthy of protection, have labelled wetlands as “*suitable for modification*” (Múgica and De Lucio, 1996. p.230), and as generally unattractive places to visit.

The literature review, however, highlighted the possibility of changing public perceptions with respect to the image of particular landscapes. As an example, prior to the Romantic movement and the literary publications of poets such as Wordsworth, Coleridge and Gray, the Lake District was not considered as a visitor destination, nor was the Derbyshire Peak District. That both are now popular visitor destinations suggests a change in the public perception of such formerly inhospitable regions. This

offers an illustration of the potential for change in public perception of low-lying, wet fen landscapes.

2.5.1.1. The Lake District: an example of changing public perceptions and the taming of the 'natural' landscape.

"Mountains are the beginning and the end of all natural scenery" (Ruskin, 1819-1900, cited in Sharma, 1995, p.384). As Ruskin owned a house in the Lake District, and was an instigator in the founding of the Environmental Movement (Speel, Undated), there is an assumption that this was a compliment to mountainous regions. Ruskin was not alone in such compliments, particularly in respect to the Lake District. Poets such as Gray, Wordsworth and Coleridge helped to establish an image of the Lake District that encouraged visitors, an image that highlighted the perceived 'naturalness' of the region (Urry, 1995). With many Victorian era intellectuals, artists and writers establishing homes or visiting the region, the wonders of the Lake District and the pleasures to be had from viewing and walking within the 'natural' landscape became well known, enhanced by the production of guide books and walking tours. The influence and popularity of poets and artists such as Wordsworth and Ruskin encouraged visitors to the region, and indeed their homes, the poets and artists themselves becoming entwined with the development of the Lake District as a visitor destination. Railways, although objected to by both Ruskin and Wordsworth, enabled further visitors to see for themselves the 'natural' landscape, or "*place-myth*" (Urry 1995. p.194) created through the works of the nineteenth century intellectuals.

However, the Lake District was not always afforded such popularity, nor referred to as a place to visit for pleasure and to view nature. The Lake District as a place-myth, a place for visitor consumption, did not exist before the arrival of the nineteenth century 'Lake Poets' (Wordsworth, Coleridge, Southey and Gray) and fellow artists (Urry, 1995). Noted as "*hideous, hanging hills*" in 1630, and "*barren and frightful*" according to Daniel Defoe in the 1700's (Urry, 1995, p.193, citing Ousby 1990 and Nicholson 1978), the Lake District was not viewed as a pleasurable destination. Similar comments were made by Celia Fiennes (1662 - 1741) and Daniel Defoe (1661 - 1731) with respect to the now popular Derbyshire Peak District (Defoe, 1724; Ducey, 1998). Mountains in general were not viewed as places to visit unless one had good reason, but rather considered as places of danger, home to unpredictable weather, poor access and

whatever further dangers the imagination could provide, including dragons (Sharma, 1995).

The popularity of the Lake and Peak Districts today is testament to the power of the descriptive and visual mediums of writing, art and later, photography and film. The Lake Poets and artists of the nineteenth century Romantic era helped changed the public perception of mountainous regions, not only within the UK, but also within a European and global context. The advent of film showed the wider, global landscape in all its splendour, albeit through the interpretation and lens of the cinematographer, to an ever increasing audience. Fears were overcome as people explored this 'natural' landscape. Throughout Europe, the development of climbing and mountaineering reduced the imagined dangers of beasts such as dragons through a lack of sightings as places once remote became accessible. Developments in equipment reduced many of the dangers faced by early mountaineers, and thus today, if all does go wrong in the mountains, a cell-phone and helicopter can assist in rescue.

Thus mountains, once the home of numerous dangers imagined and real, have been 'tamed'. Whilst dangers do still exist, from falls, poor weather and hypothermia, the general population takes to the hill and mountains of the UK as they do to the high street; with stout boots and little regard for the dangers their forebears faced.

Technological advances and knowledge have reduced the fear of the unknown along with the known. Weather, although unpredictable, can be forecast to some degree, and there are no bears and wolves in the UK to cause concern. More importantly, the image of mountains as wild and dangerous places has been reduced, even though, as regular accidents show, mountains are still dangerous. We can safely enter the danger of hills and mountains comforted in the knowledge that our technology can (usually) insulate and rescue us from what ever danger remains. Technology has made 'nature' "*comfortably accessible*" (Bell and Lyall, 2002, p.98). Thus even the danger itself is presented as an attraction. With the right equipment, the image suggests, you can confront the wild landscape, and win.

2.5.1.2. Presenting the 'natural' image.

The 'discovery' of the Lake District by the Lake Poets, Coleridge, Southey and Wordsworth (Urry, 1995), their fellow intellectuals, and the subsequent publicising of

the 'natural', global landscape, has continued through paintings, photography, film, television, and literature. This has created an anticipation of pleasure on behalf of the potential tourist or visitor, through the construction of a "*tourist gaze*" and a consequential "*visual consumption*" of the landscape (Urry, 2002, p.1 and 1995, p.174). Images of landscapes are used to promote areas for visitor consumption, the 'naturalness' or nature of an area being presented to the public as something worth seeing. Paintings by Thomas Moran, financed by the Atchison, Topeka and Santa Fe Railway in 1901, were instrumental in presenting an image of the Grand Canyon to the public (Neumann, 2002). Paintings of the canyon by further artists followed, as did photographs, film and descriptive writings, from which followed visitors wishing to see this natural wonder for themselves. That Moran's original painting, '*The Chasm of the Colorado*', was compiled from sketches and photographs of different views along the canyon rim, is incidental, as is the fact that it was painted in Philadelphia. The image and anticipation the painting created in the public mind is the critical aspect (Neumann, 2002). This visual encouragement is also noted by Bell and Lyall, (2002), in commenting on the television series, '*Last of the Summer Wine*'. The series presents an image of England, its landscapes and occupants, from a former, more leisurely time. This image is an image that can be repeated indefinitely through television and video, almost as an "*invitation*" (Bell and Lyall, 2002, p.49), creating visitor anticipation of what to expect on visiting the region, at least in landscape terms, (but not necessarily Compo and Nora Batty).

The images of mountains, hills, and much of the English countryside, are therefore presented in a manner to highlight the natural image, even though it may not be natural. The 'natural' vegetation of the valley floor in Yosemite National Park, California, resulted from management by fire, courtesy of the Ahwahneechee Indians prior to visits by Europeans (Sharma, 1995). The Lake District, that place presented as natural in nineteenth century, Urry's place-myth, is the result of management over many years (Urry, 1995). Wild perhaps in terms of weather, but a managed, unnatural landscape nonetheless. The public seem uncaring that what is presented is in fact an unnatural landscape. The enjoyment of being outdoors is reason enough. For many, natural and rural may be the same thing, and it is the difference from the 'norm' of everyday life that the public seek (Tyrväinen *et al.*, 2001; Urry, 2002).

2.5.1.3. Lowlands and wetlands: out in the cold?

Conversely, whilst hills and mountains are praised, flat, low-lying and wet landscapes are often perceived as unpleasant, dull, bleak and boring landscapes. Regions such as the Humberhead Levels and the Fens receive few visitors compared to the Peak or Lake Districts. Low-lying landscapes are outside the everyday life and norm of the majority of the population. If this is considered as a result of a lack of visitor facilities in low-lying regions, then the assumption is that there were visitor facilities in the Lake District before the arrival of the Lake Poets and their colleagues, simply waiting for the arrival of visitors. This is an unlikely scenario. Low-lying and wetland landscapes do not seem to catch the Public imagination as mountains, moorlands and hills do. The image of low-lying landscapes is not presented to society as the image of mountains are; as aesthetically beautiful, as natural, as somewhere to visit. Wetlands are more often presented as places of primeval danger and fear, as wastelands, or wasted land. As Giblett (1996) observes, wetlands have been presented in a poor light, as and associated with places of disease, of danger, of evil, and of Hell, by writers such as Hippocrates, Aristotle (*Problemata*), Shakespeare (*King Lear*, *The Tempest*), Dickens (*Martin Chuzzlewit*), Milton (*Paradise Lost*) and C. S. Forester (*African Queen*). More recently, the public, through Peter Jackson's film adaptation of Tolkien's 'Lord of the Rings', have seen the untrustworthy Gollum presented as a creature who is more at home in damp, dark caves and swamp lands than in drier surroundings. The hero Frodo Baggins, however, originates from the picturesque Shire. The aesthetically beautiful image of mountains and much of the UK countryside is thus reinforced in the public consciousness through regular exposure in the media. Whist "*the category of the picturesque was (is) elastic*" (Taylor, 1994, p.266), low-lying and wetland landscapes rarely receive such positive exposure. Consequently, whilst "*any fool can appreciate mountain scenery, it takes a man of discernment to appreciate the fens*" (Anon., in Caufield, 1991, p.58), the ignoring of fenland landscapes by mainstream media sources eliminates any chance of public discernment and wetland appreciation.

2.5.1.4. An increased exposure of the landscape.

Irrespective of 'naturalness', that landscapes in general are becoming of greater interest to the public as more than the backdrop for a holiday is witnessed via the media, through the number of programmes on television with a landscape context. Since 2000,

the BBC have aired at least five series based around the landscape: '*Talking Landscapes*' (2001), '*Landscape Mysteries*' (2003), '*This Land*' (2003), '*A Picture of Britain*' (2005), and '*Coast*' (2005) (Goodey, 2005). Many other programmes, whether wildlife-based or considering the UK's industrial history, use the landscape as a backdrop for the programme content. So do articles and photographs within the printed media. As such, the BBC is not alone. Grampian TV aired a seven part photographic series, '*Seeing Scotland*', in the autumn of 2005, with the series aiming to capture some of Scotland's more visually attractive scenery (Waite, 2005). Thus, landscapes and their history are becoming less the preserve of the relative few who venture into them, and more of an interest even for those whose landscape access is via the television or other media. So in addition to the productive value of landscape (agricultural or tourism), the economic and social value of landscape through the media is increasing.

Much content of such television programmes is based on the dramatic and picturesque elements in the landscape. Nonetheless, flat and fen landscapes do receive attention and increased exposure. In conjunction with the BBC's '*A Picture of Britain*' series, the Tate Gallery's '*Flatlands*' exhibition details paintings from within the fen landscape of East Anglia, with works by Constable, Stubbs, Turner, and more recently Gilbert and George (Tate Online, 2005). As such, flat landscapes receive greater public exposure, and are thus potentially seen by a greater number of potential visitors.

2.5.2. Factors affecting preferences for landscape types.

Much research has been undertaken into public perceptions of landscapes, the preferences for landscape types, and the reasons for those preferences (Strumse, 1996; Múgica and De Lucio, 1996; Clay and Daniel, 2000; Brush *et al.*, 2000; Herzog *et al.*, 2000; Kaltenborn and Bjerke, 2002; de Groot and van de Born, 2003). With many of the factors identified being of a subtle, sub-conscious nature, the aesthetics of landscapes are of concern. The research focus varies from psychological and cultural issues, to landscape management affecting visitor enjoyment and perceptions.

Cultural, occupational and educational factors associated with landscape preferences are noted in research papers (Brush *et al.*, 2000; Kaltenborn and Bjerke, 2002; Chhetri *et al.*, 2004). Landscapes containing water, mountains and natural aspects are regularly

presented as preferred landscape types, as are traditional forms of agriculture (Strumse, 1996; Múgica and De Lucio, 1996; Tyrväinen *et al.*, 2001; Kaltenborn and Bjerke, 2002; de Groot and van de Born, 2003; Nasar and Minhui, 2004). In contrast, flat, open, orderly and regulated landscapes, particularly those associated with modern agricultural techniques, are noted as least desirable (with allowances for cultural influences) (Strumse, 1996; Kaltenborn and Bjerke, 2002; de Groot and van de Born, 2003). Factors such as upbringing, memories of holidays, familiarity, employment and professional experience are all presented as reasons for individual preferences regarding landscape types (Strumse, 1996; Múgica and De Lucio, 1996; Brush *et al.*, 2000; Herzog *et al.*, 2000). Eco-centric and anthropogenic factors, along with personality characteristics, have also been attributed to landscape preferences (Abello and Bernaldez, 1986; Kaltenborn and Bjerke, 2002). Further considerations given include evolutionary factors (Herzog *et al.*, 2000). Thus an individual's response to the wider landscape is the product of many factors. Whilst some will be unrecognised, ingrained traits within an individual's character, and therefore difficult to alter, others, such as eco-centric, water-related and traditional agricultural factors, offer opportunities for encouraging visitors to particular landscapes. The identification of such factors in the literature provides opportunities for landscape management to meet some of the identified perception factors, and visitor types. This might encourage visitors to a region. A similar strategy in destination marketing is noted by Downward and Lumsdon (2003).

2.5.3. The destination image.

The image, and therefore perception, of a destination is thought to be critical in the selection process of visitor destinations, even if that image is an inaccurate representation. Destination images can be more effective in creating visitor interest than factual information (Ross, 1998). With a concerted effort, the Public image of low-lying and wetland landscapes could perhaps be changed through the use of the media. Such landscapes could be presented as places of interest, ecological importance, and historical value. The establishing of reserves to protect wetland sites illustrates that the importance of such landscapes has been realised (Múgica and De Lucio, 1996). However, negative perceptions of low-lying landscapes and wetlands based on nurture and evolutionary factors would be considerably more difficult to overcome. To

understand the negative perceptions of low-lying and especially wet lands, it is importance to briefly consider evolutionary factors and historical contexts.

2.5.4. Lowlands and wetlands in a societal context.

In an evolutionary context, water is critical for Life. Thus, that a preference for landscapes containing water is noted by many studies should not be surprising. An instinctive, subconscious desire to be close to fresh water is perhaps a Human condition. As societies developed, evolutionary needs will have been complimented and nurtured by cultural factors. Community viability relies on a dependable water supply. Water-bodies as places for recreational activities in modern societies will have further strengthened this cultural link. However, whilst landscape preferences have been noted with respect to rivers and lakes (Múgica and De Lucio, 1996; Herzog *et al.*, 2000; Kaltenborn and Bjerke, 2002; Tyrväinen *et al.*, undated), this appreciation does not appear to have included wetlands, particularly in respect to preservation of such landscapes (Múgica and De Lucio, 1996).

In an historical context, wetlands were places of not only produce (fish, wildfowl, reeds, withies, peat *etc.*), but also noted places of danger. Difficult to traverse, wetlands contained bogs, water of often poor quality, methane gas emissions in the form of Wil o'er the Wisp (Raeymaekers *et al.*, undated), and were often the haunt of people on the fringes of society. The difficulty of traversing wetlands made them ideal hiding places for those facing persecution, and ideal locations for outlaws, brigands and even armies to live. Those hiding in and making use of the defensive aspects of wetlands include Alfred the Great and Hereward the Wake (Purseglove, 1988). More recently, the Viet Cong army used the wetlands of the Mekong Delta and the Plain of Reeds from which to hide and attack French and American forces (Giblett, 1996), whilst Saddam Hussain attacked and drained the homeland of the Iraqi Marsh Arabs at the confluence of the Tigris and Euphrates rivers. Difficult to access, the marshlands provided a safe haven for political opponents and army deserters (HRW, 2003).

Wetlands were also places of disease (Rackham, 1986; Múgica and De Lucio, 1996; Giblett, 1996; Countryside Agency, 1999b), including malaria and ague. As a native UK disease, the last recorded case of malaria occurred in Kent in 1918 (Rackham,

1986). Recipients of bad press, fenland people were depicted as "*as race apart, fiercely independent, ague-ridden, web-footed*" (Rackham, 1986. p.347), and as "*wild*" (Caufield, 1991. p.61). Fenlanders were able to roam unchecked across many miles of wetland, whilst making a comfortable living without many of the restraints imposed on other rural dwellers by powerful landlords. Consequently regarded as "*centres of resistance*" (Purseglove, 1988, in Caufield, 1991. p.63.), wetlands have been drained since the Roman era at least. This was both as a form of improving land for agriculture, but also as a means of controlling fenland regions and their populations, and under the guise of reducing the outbreak of disease (Giblett, 1996). Large landowners, including the Crown, have sought to control many of the common rights afforded to fenlanders (Rackham, 1986). Resistance to drainage operations, in the forms of battles and riots, have encouraged further drainage operations as a means of controlling dissent, and increased the popular image of wetlands as places of no value, commercially or socially. With land acquiring the status of an industrial commodity following the Industrial Revolution in the Eighteenth Century, unusable land was considered '*waste*', being culturally labelled as '*worthless*' (Raeymaekers *et al.*, undated, p1). Consequently, wetlands have assumed little value as a landscape, other than to be controlled, up until the latter Twentieth Century.

With controlling authorities in the past having little regard for wetlands, it is unsurprising that the general public is of the same opinion. The national park status traditionally afforded to regions such the Peak and Lake Districts, whilst not affording such status to (presumed) aesthetically unattractive, low-lying and wetland regions, reinforces this lack of value. By dint of lower status, such landscapes are deemed "*suitable for modification*" (Múgica and De Lucio, 1996. p.230).

2.5.4.1. Illustrations of change in the valuing of wetlands as important landscapes.

However, with the above and the general increased exposure of landscape topics as noted, appreciation of wetlands as landscapes of importance appears to be increasing. Recognised as important on an international scale through the 1971 Ramsar 'Convention on Wetlands' treaty, and with wetlands being given UNESCO, World Heritage Status (RCB, 2005), their importance as landscapes of ecological, social and economic value is recognised. More recent example of this increased recognition for wetlands is noted by

Purseglove (1988), Giblett (1996) and Smith (2004) raising the profile of wet and low-lying landscapes for a broad readership. The establishment of numerous wetland nature reserves and visitor attractions (WWT Welney, RSPB Ouse Washes, The Great Fen Project, RSPB Old Moor) introduces increased numbers of the public to wet, fen landscapes. With wetlands linked to water management at European policy level, recent EU legislation such as the Water Framework Directive (Directive 2000/60/EC) and programmes like the EU Life-Environment Projects¹, supported by Directives on habitat and wildlife protection (Habitats Directive 92/43/EEC; Birds Directive 79/409/EEC), demonstrates a wider policy change. This is regarding the overall value of sustainable water management, including wetland management and the wider environmental benefits. Within these policies, management of wetlands for wildlife is noted, as exemplified by the EU Life Fund 'Reedbeds for Bitterns' programme², as are the benefits of human activity in maintaining biodiversity (Life, 2005).

As a popular visitor destination and a region of historic and environmental value, the nominal national park status given to the Norfolk Broads illustrates further the increased recognition of the value of wetland landscapes as landscapes worthy of protection. Instigated through an Act of Parliament in 1989, the Norfolk Broads differ in their national park status through a responsibility for waterways navigation, a criteria not required of the more 'traditional' dales and upland national parks within the UK (Broads Authority, 2001). Such recently afforded status illustrates a growing policy awareness of the multiple value of such wet landscapes. This is further illustrated through the publicly funded buy-out, via English Nature, and cessation of peat cutting operations on Thorne and Hatfield Moors in the Humberhead Levels. A little visited wetland landscape, Thorne and Hatfield Moors nonetheless achieved publicly owned status as a National Nature Reserve as their value became recognised through the efforts of concerned individuals (Smith, 2004). As such, and in conjunction with nearby Crowle Moors, Thorne and Hatfield Moors potentially form a central component of wetland, nature-based recreation and leisure within the Humberhead Levels.

¹ LIFE: <http://europa.eu.int/comm/environment/life/home.htm>. Wise Use of Floodplains: www.floodplains.org.

² Life-Reedbeds for Bitterns. www.bitterns.org.uk/

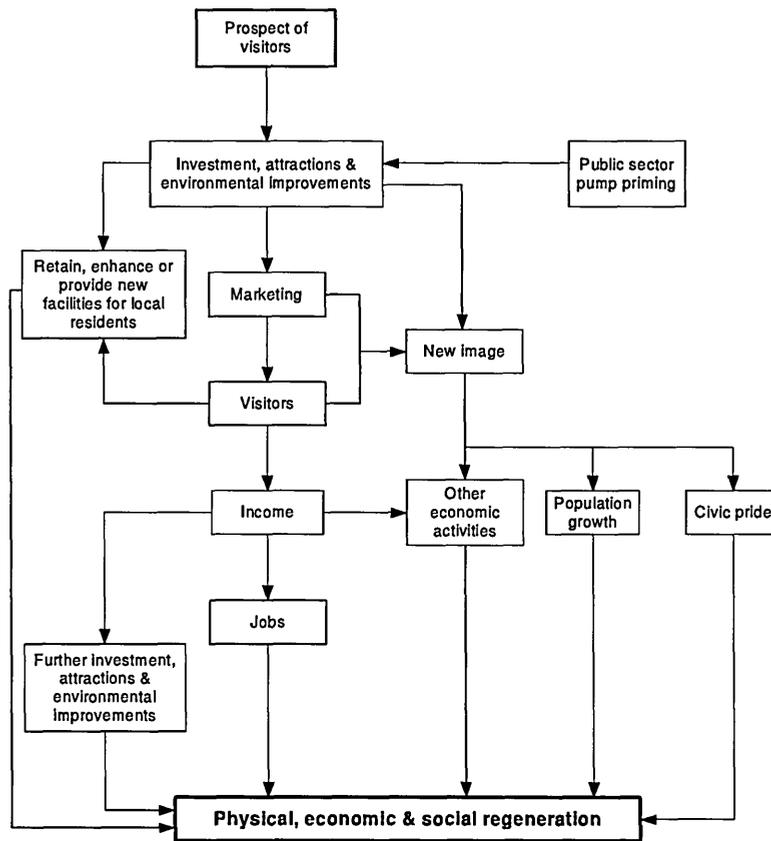
2.5.5. Visitor attractions as factors in improving regional perception.

Whilst improved landscape perception is one aspect of attracting visitors, the establishment of visitor attractions can also play an important role in improving public perceptions of regions or cities not considered visitor destinations. Law (2002) suggests that a selection of visitor attractions within a region, both in reality and an awareness of, may collectively act as a "*magnet*" (Law, 2002, p.95) in attracting visitors and further investment, and thus create a critical mass of businesses that encourages the maintenance rural communities. Convery (1990, p.34) notes that the use of bogland (and therefore wetland) areas, associated with an attractive built environment, "*as a tourist magnet has great intuitive appeal*". The built environment in this respect being potentially represented by the local community infrastructure and visitor attractions. Importantly, a conglomeration of visitor attractions may go some way to altering public perception of a region and landscape, offering potential for the region to become known as a visitor destination in its own right.

With considerations of inward investment, whilst subjective, improvements in the image of a region through changes in perception can increase the confidence of those wishing to invest in an enterprise (DoE, 1990). That tourism development projects raise awareness of locations and are perceived as beneficial by local people and businesses alike is noted in the DoE (1990) report on tourism in inner cities. Thus changes in image and perception can have an economic effect by attracting inward investment, which itself may attract further, similar investment or income through visitors (Rotherham *et al.*, 2002a; Law, 2002).

In noting the importance of destination image, Law (2002), with respect to urban tourism, offers a diagrammatic representation of the potential for visitors and associated visitor development to stimulate economic development. This is shown in Figure 3 and includes considerations of environmental improvements. Whereas Bonnieux and Le Goffe (1997), in Figure 2, illustrate the differing aspects and links between uses and values associated with a restoration programme in market-non-market, use-non-use forms, and thus in a more esoteric manner, Law (2002) details factors of a more specific nature. In identifying the aspects detailed in Figure 3, Law (2002) illustrates numerous components of the literature review and considered important for the research, including employment, destination image and so visitor perception, marketing, the retention of

economic benefits and associated community and social viability. In conjunction with Figure 2, the approach shown in Figure 3 informed the development of the research framework, Figure 4.



Source: After Law, 1992; in Law, 2002.

Figure 3: Strategy of urban tourism.

2.6.0. Section Six: Landscape, agricultural management, and the influence of policy.

The UK landscape is the product of many differing uses and many generations of what could be termed 'land managers', i.e. farmers, woodsmen, industrialists, landlords and nobility. There was also an input on the landscape by the general population using it as a source of supplies (Rackham, 1986; Hoskins, 1988). In today's post-industrial revolution and predominantly urban-based society, the management of the land is entrusted to the relatively few. The results of generations of land management, however, are enjoyed by today's urban populations in a way in which their forebears were unable: for pleasure and enjoyment without the difficulty and danger of travel and communication.

The provision of lodgings for travellers, traders and pilgrims is long established (Ousby, 1990), encouraging the development of hospitality trades and thus the development of tourist facilities, both within urban and rural areas. With the rise of a more affluent, professional middle class, improved road transport and the onset of the railways, and latterly personal transport through the use of motor cars, a new market emerged within the rural landscape. This was of the visitor and those seeking leisure and recreation away from their everyday existence (Andrews, 1990; Taylor, 1994; Bell and Lyall, 2002). The development of this "*mobile class*" of person (Taylor, 1994, p.90) provided rural areas with an increasingly valuable source of income, that of mass tourism, and thus by dint of increasing visitor-related revenue, the rural landscape became a place of leisure and enjoyment, a park to be played in.

Agriculture, the predominant developer of the landscape (Dwyer and Hodge, 1996), whilst responsible for the maintenance of the countryside, contributes considerably less to the national economy than rural tourism income. This situation was highlighted by the drop in tourism income resulting from the 2001 Foot and Mouth outbreak. For the year 2000, estimated farm income totalled £1.88 billion, down from a 25-year low of £2.51 billion in 1999 and at their lowest level since the 1930s', whilst income from tourism in 2000 totalled £12 billion (Countryside Agency, 2001b and 2005b). Thus issues of rural and agricultural policy, formerly concerned with producing sufficient quantities of food, must now consider the wider impacts on the landscape associated with agriculture, visitor spend and increasingly, water management and conservation.

The marginal value of "countryside goods" has increased relative to the marginal value of agricultural output. Thus agriculture is required to compete with alternative landscape demands (Hodge, 2001. p. 100). In deciding policy issues, therefore, policies which could impinge on the greater value visitor market and increasingly important environmental issues must be considered.

2.6.1. Rural and agricultural policy: an outline.

Post-World War Two, UK and EU agricultural policy concentrated on increasing food production as a result of food shortages experienced during and following the war. The 1942 Report of the Committee on Land Utilisation in Rural Areas (The Scott Report), and the 1947 Agriculture Act encouraged greater efficiency in agriculture, guaranteeing prices and markets for produce and theoretically maximising the potential for rural employment, and thus supporting rural populations. With agricultural subsidies linked to agricultural output, such policies encouraged intensification of agriculture, the consequences of which impacted greatly on the UK flora and fauna (Dwyer and Hodge, 1996; Stoate, 1996; Evans and Morris, 1997; Hodge, 2001; BI, 2004). Similarly to UK policy, the 1957 Treaty of Rome and the Common Agricultural Policy (CAP) encouraged intensification of agriculture to overcome European food shortages. With the entry of the UK into the European Community in 1973, UK agricultural policy was subsumed by Article 39 of the Treaty of Rome, which bore a close resemblance to the 1947 Agricultural Act, specifying many of the same aims, Table 1 (Dwyer and Hodge, 1996).

| Agricultural aims: Article 39, Treaty of Rome (1957) |
|--|
| <ul style="list-style-type: none"> • To increase agricultural productivity by promoting technical progress and by ensuring the rational; development of agricultural production and the optimum utilisation of the factors of production, in particular labour; • thus to ensure a fair standard of living for the agricultural community, in particular by increasing the individual earnings of persons engaged in agriculture; • to stabilise markets; • to assure the availability of supplies; • to ensure that supplies reach consumers at reasonable prices. |

Source: Dwyer and Hodge, 1996, p. 4.

Table 1: Agricultural aims within Article 39, 1957 Treaty of Rome.

The success of the post-war agricultural initiatives in increasing agricultural output is not questioned. In comparison to 1950's output, yields of cereals, root crops and milk have doubled and even tripled per hectare (Pretty *et al.*, 2000). However, whilst

agricultural production has increased, technological advances and mechanisation have lead to a decrease in agricultural employment, and CAP has failed to ensure suitable and consistent levels of income for farmers, with consequences for rural communities. Inadvertently encouraging a disparity in farm incomes, around 20% of farmers receive 80% of subsidies, with, in many instances, larger, more intensive farms receiving subsidies at the expense of smaller farms (BI, 2004). Excessive European agricultural production has ensured an over-supply of produce, maintained by an increasingly high proportion of the EU budget, with produce being released onto the World Market at less than cost price, thus impacting on non-European countries and distorting global agricultural prices. Furthermore, through the payment of subsidies, European food prices are maintained at an artificially high level (Dwyer and Hodge, 1996; BI, 2004).

Further to issues of production, employment and income, CAP-related impacts on the wider environment have been considerable. Increased intensification has lead to marginal land being improved for agricultural production, whilst the economies of scale have encouraged concentration of crop varieties, thus lessening regional and ecological diversity. Such concentration of crop varieties increases susceptibility to disease and crop failure, with resultant insecurity of income. Increased intensification has lead to increases in fertilizer and pesticide use, whilst larger fields have given rise to problems of soil erosion, and high stocking densities to problems of effluent contaminating water courses. As a consequence, flora and fauna species have suffered, with species numbers declining rapidly in recent decades (Stoate, 1996; Dwyer and Hodge, 1996; Pretty *et al.*, 2000; Hodge, 2001; BI, 2004).

In considering the overall, external costs of UK agriculture, Pretty *et al.* (2000) considered environmental factors such as loss of biodiversity, pollution and disease, losses of hedges and walls, declines in bee colonies and damage to human health. Although such non-market values are difficult to substantiate, Pretty *et al.* (2000) conservatively estimate that around £2,343m (at 1996 prices), or 89% of average net farm income, is attributable to such external costs. This equates to £208/ha/year for arable and permanent grassland (excluding rough grazing), assuming 11.28m ha of such land within the UK. Such costs have implications for agricultural and rural policies, with Pretty *et al.* (2000, p. 118) noting the "*substantial external costs per hectare*" of modern farming.

2.6.2. Agri-environmental policies.

Such problems associated with CAP have not gone un-noticed, with reforms being undertaken in 1992, 1999 and 2003, Table 2. Whilst aspects of these have been related to agricultural output and world trade, reforms have also targeted environmental concerns. The gradual rise in awareness in conservation and environmental issues during the Nineteenth Century, coupled with an increasingly mobile, environmentally aware and educated public, combined to influence environmental and conservation policy, including those related to agriculture. In this respect, environmental and conservation organisations, such as the RSPB, the National Trust, CPRE, Greenpeace and Friends of the Earth, and numerous smaller, local organisations, applied pressure upon and influence to policy with respect to agricultural and environmental reform. Thus environmental and 'quality of life' issues have become integral components of agricultural and rural policies (Dwyer and Hodge, 1996), as reflected in CAP reforms and agri-environmental schemes (Table 2 and Table 3). Further to this, the more holistic approach to water management entrained within the 2000 Water Framework Directive offers opportunities to restore the balance between agricultural production, water resources and wetland loss. In a European context, agricultural development is considered to be the greatest cause of wetland loss. Citing 1984, Nature Conservancy Council data, Hodge (2001) notes that 60% of lowland bogs and 50% of lowland marsh were lost to agricultural development in the 40 years following World War Two. CAP reforms that consider agriculture in a wider environmental context and in conjunction with the Water Framework Directive offer potential to harmonise such areas of discord (Maltby and Thorne, Undated).

| Common Agricultural Policy reforms |
|---|
| <ul style="list-style-type: none">• 1992: McSharry Reform - aimed at reducing over production, limiting price support and introducing direct payments, introducing agri-environment schemes.• 1999: Agenda 2000 package - further limiting of guaranteed prices & increase in direct payments. Rural development and agri-environment policies grouped in a legal framework, with increases in funding.• 2003: Payments de-coupled from agricultural production and paid to farmers under a single farm payment scheme. De-coupling removes subsidy-related incentives to increase crop output. |

Source: BI, 2004.

Table 2: Common Agricultural Policy reforms.

Whilst CAP reforms have attempted to stimulate rural development, sustainable agriculture and protect the environment, their instigation is not without issue, and their effectiveness with respect to countryside management questioned. In many instances

having to vie with price support systems, agri-environmental polices and schemes associated with CAP are viewed as unsystematic, incomprehensive, incoherent, and limited in their ability to generate sustainable agriculture (Evans and Morris, 1997). With the voluntary nature of many agri-environment schemes and the potential profits in arable production combined with market prices, the take-up of agri-environmental schemes in intensively farmed, arable, lowland regions has been low (Hawke and Kovaleva, 1998). This affects areas such as the Humberhead Levels and Fens. Thus the effectiveness of such voluntary schemes is questioned. However, the 2005 introduction of the 'Single Farm Payment' scheme and de-coupling subsidies from agricultural production presents new opportunities for landowners and environmental protection. Further reforms and the instigation of rural development policies are also expected (BI, 2004; Fish *et al.*, 2002). Table 3 details a selection of agric-environmental schemes introduced since the introduction of Sites of Special Scientific Interest in 1949.

| Agri-environment policy | Date of instigation | Aims & Effectiveness |
|--------------------------------------|--------------------------------------|---|
| Sites of Special Scientific Interest | 1949, up-dated in 1981, amended 2000 | Originated in the 1949 National Parks & Access to the Countryside Act, updated in the 1981 Wildlife & Countryside Act & amended by the Countryside & rights of Way Act 2000. Designed to protect small areas of land important for conservation and geology. SSSIs imposed on landowners. Limited activities can be undertaken in designated areas, in return for financial compensation for lost profits. Landowners can appeal against designations. Prosecution can follow SSSI infringements. Limited funds available to manage SSSI sites. Agriculture accounts for 37% of damaged SSSIs per year. |
| Environmentally Sensitive Areas | 1986 - 1994 | Encourages environmentally friendly farming in return for flat rate payments. A popular scheme considered a success, but effectiveness in question. |
| Countryside Premium Scheme | 1989 | Limited to seven, Eastern England counties as an experimental process of assessing set-aside as a method of benefiting flora and fauna through beneficial land management in return for payments. Subsequently taken up in CAP set-aside schemes. |
| Nitrate Sensitive Areas | 1990 | MAFF instigated scheme to reduce nitrate levels in water supplies. Landowners in affected areas offered payments in return for voluntarily adopting methods limiting nitrate pollution from agricultural use. Seriousness and source of nitrate pollution in water supplies questioned, as is the policy of a voluntary rather than statutory scheme. |
| Woodland Grant Scheme | 1991 | Launched in 1991 by the Forestry Commission following a three year experimental period. Voluntary scheme in which landowners receive payments towards the expense of planting woodlands, including allowing for the time period between planting and harvesting timber. Higher payments for establishment of deciduous trees requiring longer maturation period and return on investment. Poor take up as farmers do not consider themselves woodsmen. |
| Wildlife Enhancement Scheme | 1992 | English Nature scheme designed to simplify SSSI management agreements and enhance conservation interest. Encourages positive action, allows for flexibility in supported practices, with landowners receiving standard payments for specific management types. |
| Countryside Access Scheme | 1994 | Operated in conjunction with set-aside schemes (previously Arable Area Payments Scheme in association with 1992 CAP reforms) offers payment to landowners offering public access to set-aside land. Limited uptake due to limited publicity and payment. Does not require landowners to undertake environmental beneficial management practises. |
| Countryside Stewardship | 1995/1996 | Countryside Commission experimental initiative seen as a success & re-launched by MAFF in 1996. Encourages landscape protection through payments for appropriate management. Landscape approach results in piecemeal uptake and questionable effectiveness. Budget constraints limit the number of farmers involved. Scheme closed 2004. |
| Environmental Stewardship | Launched 2005 | Following a review of agri-environment schemes in 2002-2004, the Environmental Stewardship Scheme provides funding to landowners whose land management practices encourage flora and fauna, protects and enhances landscape quality, and the historic and natural environment, as well as promoting public access. Further objectives include flood management and genetic conservation. Sub-levels of scheme include organic and higher levels of participation. Scheme start date 1 August, 2005. |

Adapted from Evans & Morris, 1997, p.192.
With additions from: Burgess *et al.*, 2000; English Nature, 2005; DEFRA, 2005b.

Table 3: Summary of principle agri-environment schemes within the UK.

2.6.3. Non-farm agricultural policies and associated initiatives.

Further to policies related to agriculture and environmental issues, the decline in agricultural labour markets and the viability of rural communities has given rise to the

introduction of policies aimed at stimulating wider rural development and regeneration. Whilst associated with agriculture and the environment, such policies also consider the rural, non-farm economy as aspects of increasing importance in a period of agricultural decline (Countryside Agency, 2004b). In conjunction with agri-environment schemes contained within the England Rural Development Programme, non-farm policies consider the importance of the rural economy as a whole. These include, for example, diversifying business opportunities both on and off-farm, rural crafts and produce, and, of importance to this research, the benefits associated with a diverse and attractive landscape as a means of attracting visitor income, including the importance of vibrant, sustainable rural communities. In this respect, the importance of an attractive landscape as a visitor attraction is noted within the Countryside Agency's Land Management Initiatives, in association with Market Town and Vital Villages Initiatives (Countryside Agency 2001c & 2004a). In recognising the holistic nature of rural communities and the association with an attractive landscape, non-farm policies and initiatives aim to encourage rural development through a multifaceted approach, thus lessening reliance on one individual sector. Table 4 details examples of past and current Countryside Agency initiatives emanating from policies associated with the England Rural Development Programme.

| Initiative | Aims |
|---------------------------|--|
| Market Town Initiative | To re-vitalise market towns through the dissemination of advice and grant aid in collaboration with local agencies and communities, thus encouraging benefits for local communities and visitors, including the provision of local services, diversity of opportunities and thus the maintenance of rural economies. |
| Vital Villages | To help sustain rural villages through the development and maintenance of community services, employment opportunities and transport systems, with assistance through grant aid and local representation on governance and development. Initiative closed to new applicants, April, 2004. |
| Countryside Capital | Promoting the benefits and products contained within the countryside, and enhancing regional benefits and character through programmes such as 'Eat the View'. Encouragement of income and investment associated with the landscape through the promotion of rural tourism and landscape heritage. |
| Wider Welcome | Promoting the countryside for recreational use and thus associated economic benefits for rural communities. Disseminating advice on access to landowners and the public, and offering development grants where applicable. |
| Local Heritage Initiative | Encouraging and assisting local communities to understand their local heritage and thus encourage protection and maintenance. Assistance in the form of advice and grant aid, in conjunction with the Heritage Lottery Fund, to ensure community involvement and wider public benefit. |

Adapted from: Countryside Agency, 2001c & countryside.gov.uk, 2005.

Table 4: Examples of Countryside Agency rural development initiatives.

2.6.3.1. Issues of future policy, future landscapes and visitor appeal.

As discussed above and observed through the well intentioned instigation of comparatively recent agricultural policies, the ability to inadvertently alter the landscape in a manner detrimental to flora and fauna and perceived public appeal is entirely feasible (Hodge, 2001). Furthermore, agricultural policies such as CAP, in conjunction with technological and social advances, also inadvertently lessened the viability of many rural communities, with the consequences becoming apparent in empty properties and abandoned farm buildings. Such features, in a modern day context, can be considered detrimental to the wider landscape appeal, as noted by visitor responses, Table 53, and by Kaltenborn and Bjerke, (2002). However, landscape and agricultural policies of the more distant past, though in many instances unpopular at the time through wholesale landscape changes and the resultant abandonment of buildings and entire villages (Hoskins, 1988, Purseglove, 1988), now provide much of the historic context and interest in today's rural landscapes. It is often this human element that provides the focus for wider landscape appeal. Whilst pristine landscapes are much admired, it is often the human influence and artefacts that draw the public, and present an element of scale within a landscape. As de Groot & van den Born (2003, p.137) note:

"People may express a preference for the wild open spaces on the highest level and yet, on the behavioural level, spread their picnic blanket in a cosy corner of the forest".

In the context of the modern, farmed landscape, 'forest' could be substituted for 'farmer's field'. Thus, in considering future landscape policies, today's landscape is as important as those of the past which Society protects and admires. With the research demonstrating that visitors appreciate and admire many aspects of the fen landscape within the Humberhead Levels and the Fens, such as the open space, wide skies and remoteness, whilst landscape improvements that benefit the environment and encourage visitors have merit, such improvements also have potential to be detrimental to the visitor market. Thus policy implementation based around landscape and environmental improvements in order to encourage a visitor market needs to consider the elements that make the Humberhead Levels and Fens attractive as they are, as identified within this research and previously discussed, and to capitalise on those elements. Any such landscape changes should enhance the landscape of the Humberhead Levels, maintain

its distinctiveness (Steadman, 2003), and thus present the region as different from other visitor destinations.

2.6.3.2. Visitor demand, public access and considerations of the CRoW Act 2000.

Whilst not strictly an agricultural policy, nonetheless, the instigation of a visitor market is likely to encourage demands for increased public access to the Humberhead Levels landscape. As such, it is possible that conflict could arise between landowners and the public with respect to access and rights of way. In this respect, recent policy encouraging public access enshrined within the Countryside and Rights of Way Act 2000 (CRoW Act 2000), requires consideration.

Introduced on November 30, 2000, through Royal Assent and progressively applied throughout England and Wales during the following years, the CRoW Act 2000 allows for public foot access and the so called 'right to roam' across land designated as and thus comprising of mountain, moor, heath, down and registered common land, with further considerations for coastal areas (JNCC, 2004). The designation of such access land is determined by either the access authority, e.g. a national park or local highway authority, or the controlling countryside body, i.e. the Countryside Agency within England (HMSO, 2000). Provisionally identified by Harrison (2005), and confirmed by area access maps (The Countryside Agency, 2005c), access land in the Humberhead Levels is limited to areas of registered common land and occasional, small areas of open land. Of the registered common land within the Humberhead Levels, Thorne Moors comprises the largest, individual area.

Identified as public access land, Thorne Moors is also a landscape of national importance with respect to flora and fauna and a designated Site of Special Scientific Interest (SSSI) (Caufield, 1991b; Smith, 2004). As such, difficulties could arise with respect to access and the protection of flora and fauna habitat. However, the CRoW Act 2000 contains provisions for the diversion of access rights of way to protect flora and fauna, whilst strengthening aspects of the Wildlife and Countryside Act 1981 with respect to threatened species and designated conservation areas, such as SSSIs (JNCC, 2004). Thus, should public access to Thorne Moors and similar sites increase, provision exists to ensure that access is managed in a manner beneficial to the continued protection of flora, fauna and associated landscapes.

With respect to the wider, predominantly intensively managed agricultural landscape within the Humberhead Levels, such landscapes, along with improved and semi-improved grasslands, are not included within the scope of public access lands as detailed within the CRoW Act 2000 (HMSO, 2000). In terms of a potential increase in access demand through increased visitor numbers, the CRoW Act 2000 will have less effect in the Humberhead Levels due to their intensively managed, agricultural use. However, this does not negate the possibility of conflicts over access and the use of existing but little used access routes. An area currently of few visitors, the simple fact of an increased number of visitors to the region may be unsettling for some local residents. This may be particularly so for landowners unused to seeing people accessing infrequently used footpaths adjacent to farm buildings and thus their contents of harvested crops or equipment. With increases in visitor and tourism activity often associated with increases in crime (Ryan, 2003), the isolated nature of many communities and farm buildings within the Humberhead Levels in association with a potential increased public use of access routes, may heighten the possibility of theft and vandalism. This could inadvertently increase issues of conflict between local populations and visitors, access-related or otherwise.

2.6.4. Conclusion: Nature-based recreation and leisure - development of the research framework.

In considering aspects of visitor and economic development, definitions of terms and landscape perceptions, and with the potential for tourism and visitor development to have both positive and negative effects, the literature review summarises key issues. Of critical importance to this research in investigating recreation and leisure as economic contributors, is the definition of 'tourism', eco-, nature-based, or otherwise. With the aim of considering the wider economic benefits attributable to all those visiting the case study regions, and the limitations imposed by many definitions of 'tourism' and thus what can be attributed to tourism and tourists, the literature review highlighted the need to adopt an encompassing term for assessing economic impacts. As such, 'visitor' enables the economic impacts of all those visiting attractions within the case study regions to be considered, and is thus the term used to include tourists and non-tourists as discussed within tourism literature (Mathieson and Wall, 1982; Flognfeldt, 1999; WTO, 2000; Sharpley, 2002b).

Further to assessing economic impacts, and associated with the benefits of cluster development and the import and export of goods, including financial capital and employees, is the inclusion of local visitor spend within economic impact studies. Whilst literature questions the inclusion of local spend, or 'existing money', within economic impact studies (Crompton, 1995; Hudson, 2001), nonetheless, such spend is considered important in assessing the overall impacts of nature-based attractions within the case study regions. After all, local people visit attractions within their local area, and their visits contribute to business viability. Because of this, the exclusion of local spend is questioned and rejected within this research. Such exclusion lessens the benefits attributable to visitor attractions within associated local economies. In relation to 'local' spend and in accord with many discussions of tourism, and with the term 'local' noted as having no clear definition, the literature review highlighted unresolved issues. With no agreed definitions for terms commonly used (as discussed in the literature review), assessment of visitor impacts and visitor attractions is made more difficult, and findings potentially more diffuse.

With landscape and an attractive countryside identified as being important to visitors (Rilla, 2004), the literature review illustrated the currently often poor view and public perception of flat and level landscapes, and in particular intensive agricultural environments (Strumse, 1996; Kaltenborn and Bjerke, 2002). Of critical importance in considering the development of a visitor market within such environments is public perception of the landscape. The potential for improvements to a perceived poor, agriculturally-dominated environment becomes important. Whilst there are indications that the value of fens and wetlands as landscapes of importance are being realised (Purseglove, 1988; Smith, 2004; RCB, 2005), in terms of the general public, this view is uncertain. It is thus a critical aspect of the research identified through the literature review. Without an understanding of the public perception of fen-type landscapes, the development of a visitor market associated with nature-based attractions in such areas is unfounded.

In considering the wider issues of tourism and visitor development, the literature review noted aspects of the destination life-cycle and tourism system (Butler, 1980; Mill and Morrison, 2002). These are considered important aspects in the development of a visitor market and to maximise local benefits. An understanding of the tourism system and the potential life-cycle of a visitor attraction or region provided insight to factors less

directly related to the practical operation of visitor attractions and maintaining the wider environment. Rather, such factors are more associated with issues of policy and management. The literature review therefore enabled the development of a research framework to assess relationships between related aspects of nature-based recreation and leisure. This framework is presented in Figure 4.

Detailing input and feedback links between nature-based recreation and leisure and associated factors, Figure 4 also illustrates 'routes of failure'. In this manner, the framework suggests that if an identified factor is missed or poorly implemented in the development of nature-based recreation and leisure, then development and economic benefit are likely to stall and fail. Such factors have been identified during previous studies (Rotherham *et al.*, 2002c), and their importance is emphasised through the literature review. Potential routes of failure therefore form integral components of the research framework.

Previous work undertaken in the Humberhead Levels (Rotherham *et al.*, 2002a and 2002b) provided prior insight into the research subject. This highlighted many of the interlinked factors related to the region as a visitor destination. Such foreknowledge provided direction to the literature review and consequential development of the research framework. The use of foreknowledge engendered a deductive element to the research (Saunders *et al.*, 2003), upon which academic underpinning of the research, through the literature review, could be placed. As a means of visualising the elements of the research and the links identified through the literature review, the framework developed thus informed the research process and the methodology chosen (Punch, 1998), and therefore the primary data collection process. In so doing, the framework provided a guide to determine the potential for nature-based recreation and leisure as factors in fenland, rural economies.

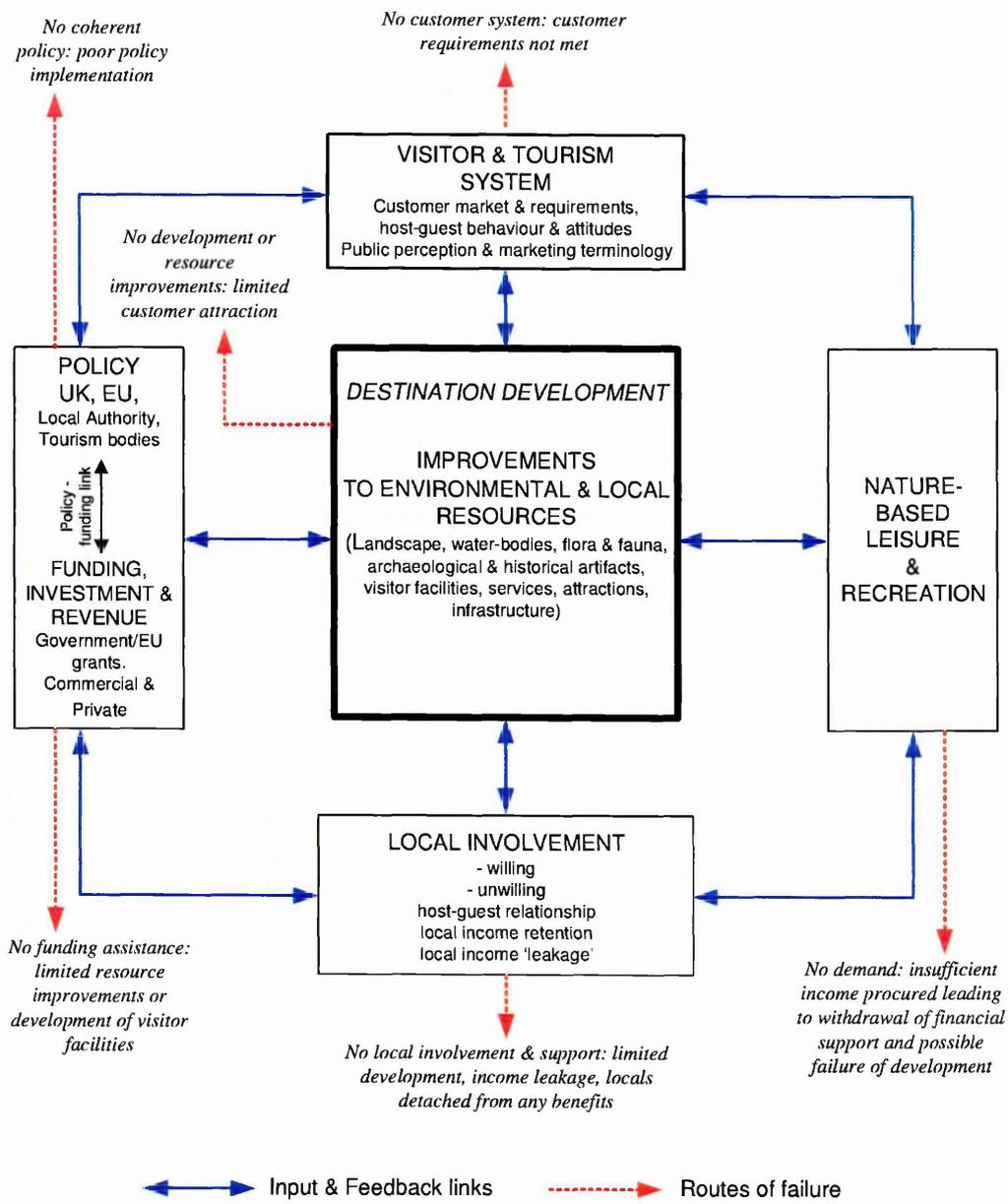


Figure 4: Nature-based recreation and leisure framework.

Chapter Three: Methodology, study region selection and data collection.

3.0.1. Introduction.

The research process of collecting and analysing data in order to answer questions posed and assumptions made requires consideration and thought in order to ensure an accuracy of findings. The lack of a coherent approach to research is likely to lead to questionable and inconclusive findings. As well as an understanding of the research topic, an understanding of the underlying principles of research is required. Through this, the most appropriate techniques and methods can be adopted, and comparisons made with similar studies and methodologies, thus providing a measure with which to compare progress and results. Further to this, an understanding of the research principles will engender a better understanding of the process of data collection and analysis, and the potential to foresee difficulties within the research process, thus enabling remedial action to be taken. Thus time spent developing an appropriate research methodology in the first instance will greatly assist in the practicalities of undertaking the research itself.

With these considerations in mind, a review of the more appropriate philosophical approaches and research methods is undertaken to inform the research process, and thus provide focus to the data gathering and following analysis stages.

3.1.0. Section One: Philosophical considerations of research.

The philosophical underpinnings of research have an important contribution to make to the research process in that they ask questions of the research process, and thus focus research attention on what the research is asking, and assumptions that are being made. There are multiple philosophical viewpoints regarding research, and each of these influences the research process chosen to complete the research task. The differing viewpoints on research philosophy are eloquently discussed elsewhere in the literature (Patton, 1990; Bryman, 2001; Robson, 2002; Creswell, 2003; Denzin & Lincoln, 2000 and 2003), and do not require reiteration here. However, their influence on the research methodology chosen requires clarification.

Saunders *et al.* (2003) provide three main philosophical approaches to research: Positivism, Interpretivism, and Realism. Creswell (2003), whilst making additions of postpositive and advocacy/participatory approaches, also introduces another philosophical approach, that of pragmatism, an approach also noted by Patton (1990), and Robson (2002). Figure 5 illustrates the differences of four philosophical approaches adapted from Creswell (2003). Whilst other authors could no doubt add to this list, it is the latter, pragmatic approach that has most resonance with this research.

| | |
|--|--|
| <p>Positivism & Postpositivism Determination Reductionism Empirical observation & measurement Theory verification</p> | <p>Constructivism/Interpretivism Understanding Multiple participant meanings Social & historical construction Theory generation</p> |
| <p>Advocacy/Participatory/Realism Political Empowerment issue-oriented Collaborative Change-oriented</p> | <p>Pragmatism Consequences of actions Problem-centered Pluralistic Real-world practice oriented</p> |

Source: Adapted from Creswell, 2003. p.6.

Figure 5: Philosophical knowledge approaches.

3.1.1. Positivism and postpositivism.

Formerly the predominant research philosophy, for social research positivism has been seen as being too structured and detached from the research subjects, i.e. people, relying as it does on value-free, objective facts and figures, and less so on the human interaction that has generated those figures. With a scientific, quantitative emphasis, positivism assumes a detachment from the reality of the World, and asks the researcher to do the same. One reality exists without any considerations of social or individual interactions (Bryman, 2001; Robson, 2002; Saunders *et al*, 2003). However, the reality of existence imposes on an individual's cultural and personal constraints, and to expect an individual, subject or researcher to be completely detached from such constraints is naive. Thus it is important for a researcher to become aware of potential research bias resulting from their own life experiences, through the process Epoché, and then to bracket out those limitations by 'divorcing' themselves from the practicalities of the real world and their own experiences (Patton, 1990; Creswell, 2003). Positivism, however, assumes this detachment of its research subjects and related data, and has been much criticised for this. The resultant postpositivism, generated as an answer to some of the criticisms of positivism's detachment, is seen by some as little more than a rearguard action created by those "*hankering after the mantle of respectability and authority that it (positivism) conferred*" (Robson, 2002. p.27).

As a progression of positivism, postpositivism, with respect to both the researcher and research subject, acknowledges the cause and affect aspects of human behaviour, i.e. that the complete detachment required of positivism is impractical and that value free, 'absolute truth' is therefore unobtainable. Observed 'effects' or 'outcomes' are likely the result of an unobserved 'cause' (Robson, 2002; Creswell, 2003). Thus the 'cause' which produced the 'outcome' can also be of interest to the postpositivist researcher, and in this manner, postpositivism leans towards Realism. Whilst accepting the foibles of human interaction as a factor in research (Patton, 2002), Postpositivism nonetheless relies on statistical, numeric data as a means of identifying the realities of the World, with the objective, scientific approach of postpositivist research echoing that of positivist research. Data is thus reduced to discrete ideas which can be tested and measured in a numeric fashion (Creswell, 2003). In doing so, and in considering the input of human interactions inherent in collecting research data, postpositivism suggests that differences

between "*belief and valid belief*" can be established (Campbell, 1999, in Patton, 2002, p.93), and thus the World better understood.

3.1.2. Interpretivism.

As a remedy to positivism's detached approach, interpretivism, in association with constructivism and also referred to by some authors as social constructionism or constructionism (Saunders *et al.*, 2003), adopts the philosophical view that an individual's view of the world is unique. Each individual has a unique story to tell, and it is this story that provides the data that will enable the researcher to understand the research subject, or the World, fully. Thus, the research subject is not detached from the data, but rather is central to it. Further known as naturalistic inquiry, interpretivism/constructivism uses everyday events and instances in which to investigate social phenomenon. Manipulation is limited, and outcomes unconstrained (Patton, 1990). For interpretivism/constructivism, reality is a socially constructed phenomenon. Individuals view the world from their own perspective, interpreting and interacting with their surroundings in line with their own, individual 'reality' (Robson, 2002; Saunders *et al.*, 2003). By obtaining many versions of this 'individual reality', researchers attempt to understand the reality of the World, from which theories can then be generated inductively (Creswell, 2003). Although criticised for not maintaining the scientific objectivity of positivism, and thus being less credible (Robson, 2002), nonetheless, interpretivism and constructivism have much to offer qualitative research in the placing of data in a real world context.

3.1.3. Realism.

The philosophy of realism, as applied to social research, considers that an individual's perception of their World is subject to the forces bearing on that individual through the cultural limitations of their experiences. Often unidentified or unconsidered, these external factors influence the way an individual behaves, and thus generates an interpretation of an individual's World that reflects their cultural upbringing. Thus realism suggests that reality exists independent of an individual's existence (Saunders *et al.*, 2003). It is the cultural reality that an individual lives within which controls the individual, determining their beliefs, thoughts and actions. Consequently, realism is

concerned with understanding the wider social reality and context within which individuals live (Bryman, 2001; Saunders *et al.*, 2003).

Adopting a more scientific approach than interpretivism, realism, and its subsets empirical and critical realism, nonetheless considers the complexities of the social context from which data is obtained. Through this, realism attempts to bridge the gap between scientific positivism and the less scientific approaches of interpretivism and constructionism. (Bryman, 2001; Robson, 2002). In considering such complexities, realism is similar to advocacy/participatory approaches noted by Creswell (2003), in which marginalised sections of society are studied, with a view to potentially emancipating those concerned. This approach entails the researcher becoming involved with the research participants, thus potentially having a considerable effect on the research outcomes. Robson (2002) provides numerous examples of literature discussing the potential of realism-based social research.

3.1.3.1. Considerations of Positivism-Postpositivism, Interpretivism and Realism.

The above review illustrates a predominantly scientific approach to data collection and analysis, and as such, the collection of statistical data is to the fore. Whilst postpositivism and realism do take into account an individual's view of the World, and the constraints placed on individuals by their cultural surroundings, unlike positivism, nonetheless, with respect to social research and an understanding of the reality of individuals, such approaches are limited. Interpretivism, by contrast, offers greater scope for understanding the World according to individuals, and the effects of cultural restraints. As such, Interpretivism is more suited to social research. However, with this current research investigating not only social considerations such as opinions of landscapes and the importance of visitor income, but also quantifiable data such as visitor spend, interpretivism lacks the scientific detachment required of quantitative data collection and analysis. Thus, in considering the research aims and objectives, a philosophical research approach that combines qualitative and quantitative, and social and scientific, aspects of research is required. In this respect, the philosophical approach of 'Pragmatism' (Patton, 2002) is considered.

3.1.4. Pragmatism.

As Saunders *et al.*, (2003) note, combining approaches to research methodology and methods is not only possible, but advantageous. A respected and predominantly American philosophical approach, pragmatism encourages a combined approach to research philosophy and methodology (Robson, 2002).

For pragmatism, the research topic is important, not the methods used (Creswell, 2003). By adhering to one doctrine or another, researchers can limit themselves to using certain approaches and methods, thus potentially stifling research opportunities. A pragmatic philosophical approach lends itself to a mixed-methodology and mixed methods, using, as Robson (2002. p.43) notes, "*whatever philosophical or methodological approach works best.....*". Pragmatism enables the combination of qualitative and quantitative methods as compatible bedfellows on the basis that modern researchers believe that reality is "*multiple, complex, constructed and stratified....*" (Robson, 2002. p.43). Thus, if reality is complex, why limit the tools available to study reality? This practical approach is noted by Patton (1990), who observes, with the concern of being accused a heretic, that "*one need not even be concerned about theory*" (Patton, 1990. p.89). Indeed, Patton further notes that not all questions are theoretical and not all studies need to be placed in a theoretical framework. The lack of theoretical framework does not lessen the value of the study. It is "*methodological appropriateness*" (Patton, 1990. p.39) that is important, not methodological orthodoxy. Table 5 illustrates some of the knowledge claims associated with a pragmatic philosophical approach, as noted by Creswell (2003).

| |
|---|
| "Pragmatism is not committed to any one system of philosophy and reality". Researchers use both quantitative and qualitative assumptions in research: a mixed methods approach. |
| Researchers have freedom of choice in methods, techniques and procedures that best meets their requirements. |
| For pragmatists, the world is not one " <i>absolute unity</i> ". Mixed methods researchers adopt numerous approaches in order to conduct research, rather than adhering to one approach only. |
| Reality and the mind are not independent. The use of quantitative and qualitative methods together enables the best understanding of the research topic. |

Source: Adapted from Creswell, 2003. p.12.

Table 5: Selected knowledge claims of a pragmatic philosophical approach.

Pragmatism is also "*real-world orientated*" (Creswell, 2003. p.6) and therefore complements the practical aims of this research with respect to the research sponsor, the

Countryside Agency. This real-world approach allowed the research and its outcomes to be examined in a practical manner, combining the basic approach of academic research with the applied and practical outcomes demanded of practitioners (Saunders *et al.*, 2003). Furthermore, Saunders *et al.* note that the input and preferences of the researcher should also be considered, central to the research as the researcher is. Whilst a too greater emphasis on this could be detrimental to the research, nonetheless, it is preferable to play to an individual's strengths. Pragmatism allows for this.

3.1.4.1. Adopting a pragmatic approach.

In enabling aspects of positivism-postpositivism, interpretivism and realism, as well as numerous other philosophical considerations, to be combined within one philosophical concept, and thus within the research methodology, the philosophical approach of pragmatism is considered most appropriate for this current research, and is thus the approach adopted. As such, and as noted above, pragmatism is compatible with the academic aims of the research and the practitioner outcomes required by the research sponsor, the Countryside Agency. Further to compatibility, pragmatism allows the use of qualitative and quantitative assumptions, with qualitative and quantitative data therefore supporting research findings. The mixed methods approach to research thus generated (Robson, 2002; Creswell, 2003), engenders the collection of more holistic data whilst placing findings in a real world context (Creswell, 2003), and as such is an important research consideration. As further put by Creswell, (2003. p.12)

"Pragmatism opens the door to multiple methods, different worldviews, and different assumptions"

and to

"different forms of data collection and analysis in the mixed methods study".

Thus, with the academic and practical outcomes required of the research understood, pragmatism enables the 'truth' to be identified, and 'truth', according to Robson (2002. p.43), is "*what works*".

3.1.4.2. Terminology, labels and pragmatism.

In discussing and using the above, a wide variety in terms used by authors to describe the various philosophical and methodological approaches to research is noted. Furthermore, authors frequently disagree on the application of terminology. Whilst without an understanding of the underlying principles the philosophical and methodological assumptions cannot be questioned, the excessive and misleading use of terminological labels complicates the issues and serves no practical use (Saunders *et al.*, 2003). Issues of concern and importance can be lost in the excessive use of labels, a practice described as "*dangerous*" by Schwandt (2003. pp. 292 & 319), who, quoting Bernstien (1986), adds that labels

"can poison and kill, and they can remedy and cure".

Pearce (1998, p.17) adds weight to the "*labelitis*" argument, claiming that not only can more than one label be worn at once, but that labels are applied

"mainly with the aim of compartmentalising everyone so they can be dammed for being in some compartment different to one's own"

and following up with

"Labels become terms of abuse".

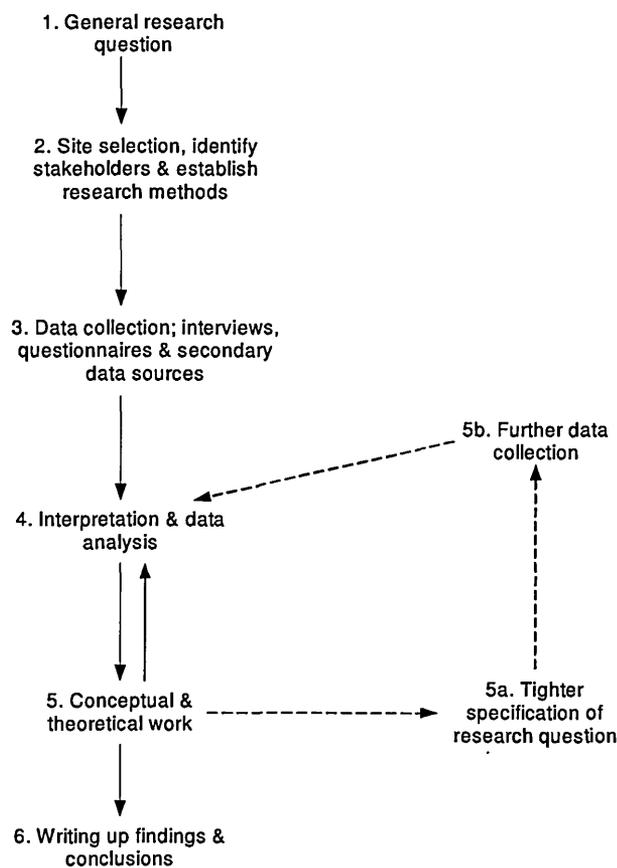
So, in understanding philosophical and methodological issues in social research, first the researcher must understand the complex labelling system, a system not necessarily understood or at least agreed upon by the literature. Thus, in light of the complex and clearly yet-to-be finalised philosophical and methodological discussions to be found in the literature, the choice of a pragmatic philosophical approach enabled the researcher to adopt the most appropriate method for a particular phase of the research. Whilst possibly a 'one-size-fits-all' approach, pragmatism enables the research to be concentrated on, and not the label.

3.2.0. Section Two: Development of the research design.

As in common with many research proposals, no ideal research strategy or method exists. Thus, with the varied nature of the research topic, and the variety of interests and stakeholders potentially involved, the research has adopted a mixed method approach, in line with the underlying, pragmatic philosophical approach, using primarily qualitative but also quantitative data (Patton, 1990; Creswell, 2003; Saunders *et al.*, 2003). Originating around 1959 during psychological studies by Campbell and Fiske (Creswell, 2003), a mixed method approach allowed differing research techniques to be applied to different aspects of the research, engendering a greater range and understanding of the issues involved, and thus to the greater benefit of the research (Saunders *et al.*, 2003). Figure 6 illustrates the basic steps in the research design.

In essence, this research is of an exploratory nature, and in adopting a pragmatic approach explored the potential for nature based leisure and recreation as a potential income generator by examining existing situations and feasibilities. An advantage of using an exploratory approach is that the research can respond and adapt to issues arising as the research progresses. Whilst this could be viewed as a lack of research direction, the inherent flexibility within the exploratory process encourages a greater variety of data to be initially collected, from which the research can progress and focus (Saunders *et al.*, 2003). Although it is critical that the research does gain focus and direction in order to eliminate extraneous influences, an overly rigid approach at the outset could result in issues being overlooked, resulting in a less than complete picture of the research topic.

A further advantage of using a mixed methods approach, underpinned by the pragmatic philosophy, is that it enables triangulation of data (Saunders *et al.*, 2003). Data gained through one method can be compared with data gained through another method, highlighting similarities or differences. If unexpected results are identified by triangulation, such factors require investigation, either because they inform the research, or because they occurred due to an error in the research process which therefore requires correction. Similarly, previous research can be used to assess and triangulate the information gained in the current research. By doing so, an indication of validity can be provided (Creswell, 2003).



Adapted from Bryman, 2001.

Figure 6: An outline of the main steps in qualitative research

3.2.1. Adopted components of the mixed method approach.

3.2.1.1. Multiple-case & comparative studies.

In order to undertake the research, three regions within the UK (section 3.3.0.) were selected as study regions, it being proposed that data from two of these regions would inform, through data collection and comparison, the theoretical potential for nature-based leisure and recreation in the primary study region. Thus, in this respect, the research had elements of a case study. Each region was considered a 'case', and a focussed, in-depth study was undertaken of each region. However, although selected because they are similar, each study region is unique, and therefore, as in case study research, each region and the data obtained within that region is representative only of itself, and not of a wider population (Black, 1999; de Vaus, 2001). Thus data gained was not directly applicable to the primary research region. However, using this approach to obtain data to inform the primary study region, and in conjunction with data from previous, similar studies, theoretical generalisations can be made (de Vaus, 2001),

and thus is the aim of the case study style approach. In this manner, findings can be compared not only between the three case study regions, but also in relation to secondary data within the literature, much in the manner of lesson drawing (Rose, 1991), discussed below. In doing so, the case study approach allows the triangulation of data and is thus suitable to the mixed methods approach adopted by the research (Denscombe, 1998; Saunders *et al.*, 2003). Also noted as being suitable for small-scale research, the case study approach further enables the use of multiple research methods, with Denscombe, (1998, p. 39) suggesting that a case study approach "*more or less encourages the use of multiple (research) methods*" to ensure a full understanding of the research subject. The applicability of the case study approach is therefore strengthened with respect to the mixed methods research approach adopted.

With the benefits of a case study approach thus highlighted, it should however be noted that the credibility of case study generalisations can be open to question, with such data being considered '*soft*' and case studies a methodologically "*soft option*" (Denscombe, 1998, p.40; de Vaus, 2001. p.219). However, the process of theoretical generalisation is one of the main benefits of a case study approach, and in this instance is used to inform the research with respect to the primary study region.

Further to the case study approach, Bryman (2001) notes that the multiple case study approach is in effect a comparative research design, with a greater understanding of phenomena being developed through the use of multiple case studies. Such a process can assist the generation of theories, and the applicability of theories. However, Bryman also notes that such research designs can encourage an inappropriate focus at the beginning of a research period, eliminating the benefits that can be gained from an initial, less focussed approach. Furthermore, Dyer and Wilkins (1991 in Bryman, 2001) suggest that specific context can be lost in the search for contrasts between cases, and by association, presumably, specific context can also be lost in the search for similarities between cases. With respect to this research, this comparative, case study style approach however generated focus for the research in as much as it enabled the study regions to be identified. By identifying and eliminating inappropriately contrasting and dissimilar regions through an initially broad and therefore less focussed approach, the task of identifying the comparative study regions became simpler. Without a research focus, findings from the study could be sufficiently diffuse as to be of little use, and the variety of factors identified in the study aims, and also present in

the comparative study regions, indicated a need to control associated but less relevant influences which could distract from the study aims.

3.2.1.2. Lesson-drawing from comparative regions & similar studies.

By the use of comparative study regions, and accessing reports of similar studies through secondary research, the study also adopted the approach of 'lesson-drawing' (Rose, 1991; Baum and Hagen, 1999; Baum, 1999; Brocklehurst *et al.*, 2000; Nash, 2003). A channel for information rather than an exact science (Brocklehurst *et al.*, 2000) lesson-drawing "*lends it self to tourism research*" (Nash, 2003, p. 133) as a method of learning from the experiences of others. Noted as a method used in policy studies (James and Lodge, 2003), including tourism policy and peripheral areas (Baum and Hagan, 1999; Nash, 2003), experiences identified could then be applied, where appropriate, with consideration and in a critical manner, to the research in question (Baum and Hagen, 1999). Although not named as such, elements of lesson drawing were adopted by Rotherham *et al.*, (2002a, 2002b, & 2005a), and Rilla, (2004), as examples, in studies related to wildlife, rural tourism and leisure, in considering ideas that could be transferred between study regions and even countries.

As such, lesson drawing enabled the research to assess and make comparisons between the three selected comparative study regions, and consider the most appropriate approach to nature-based leisure and recreation within the primary study region. Furthermore, lesson-drawing enables comparisons to be made with urban as well as rural regeneration-based visitor and tourism developments, their success and failures, and the potential application of appropriate experiences to the research. After all, with the concepts of ecotourism being applied to urban regions, "*urban ecotourism*" (Gibson *et al.*, 2003, p. 324), a similar but reverse approach may yield useful, urban-related information that can be applied to rural areas.

3.2.1.3. Survey approach.

Having identified the comparative, case study regions (section 3.3.5.), the research further adopted aspects of a survey strategy. That is, the elements pertinent to the research, i.e. stakeholders, were "*mapped*" or "*viewed comprehensively and in detail*"

(Denscombe, 1998. p.8). The process of stakeholder identification is detailed in section 3.4.0.

With a stakeholder analysis undertaken as an initial method of informing the research process, the resultant survey approach adopted enabled a broad spread of data to be collected from stakeholders within the study regions. This used methods that could be tailored to suit those identified for study or study regions. Particularly although not exclusively suited to obtaining quantitative data, a survey approach enabled standardised data to be collected. It offered opportunities for comparison, or "*patterns of association*" as put by Bryman (2001, p. 42), as well as benefits regarding analysis and cost factors. The design of the survey questionnaires used, and potential advantages and disadvantages, are discussed in section 3.4.8. Surveys are often undertaken in studies using high numbers of respondents. However, they can also be used effectively for small sample populations, although this will have considerations for later analysis. The smaller the sample population, the less generalisation can be drawn from conclusions. Consequently, analysis of small survey samples should be kept simple to ensure a sufficient number of respondents in each category used during analysis (Denscombe, 1998), and thus avoiding the drawing of conclusions based on limited data.

3.2.1.4. Ethnographic considerations.

As well as adopting aspects of case study and survey approaches, the research also borrowed elements of the ethnographic approach, in that the viewpoint and opinions of those living, working in and visiting the three comparative study regions was considered important. The term 'ethnography' is used here with a modern interpretation, with reference to discussions of all fieldwork and site visits, as opposed to the former meaning of spending a considerable time in residence with those being studied (Sharrock and Hughes, undated). Thus, and with reference to this research,

"the important feature of ethnography, and which the contemporary uses retain, is the very simple but important feature, namely, that of taking a first hand look at the phenomena that one is purporting to talk about".

(Sharrock and Hughes, undated. p2).

Adopting a "*naturalistic stance*", i.e. studying subjects in their everyday surroundings (Fielding, in Gilbert, 1993. p. 156), in essence ethnography enables the 'world views' (Kvale, 1996) of stakeholders to be considered, or, as put by Denscombe, (1989. p.69), "*grasp the native's point of view*" and thus accentuate the "*understanding (of) things from the point of view of those involved*". It is this latter quote that is pertinent to the research. As such, the pragmatic research approach of identifying and interviewing key stakeholders as a method of understanding more fully the research topic and associated subjects, prior to conducting more detailed research, was considered important. From the basis of knowledge thus gained, a more targeted and specific approach to the following data collection process was undertaken, with the context of that data and resultant findings being more fully understood.

Although for this research the ethnographic elements adopted did not include "*going native*" (Fielding, in Gilbert, 1993. p.158) by assuming a stakeholder identity and spending weeks in the field, nonetheless without the 'world view' of the stakeholders and participants so identified, the research would be divorced from the reality of the situation, and thus potentially without foundation.

As with a case study approach, ethnography, whilst holistic in nature, can be criticised for being specific, and thus not applicable to generalisation. Equally, ethnography can be described as a theoretical, generalising approach, enabling comparisons to be made (Woods, 1979, in Denscombe, 1989). However, regardless of such circular arguments, one of the principal benefits of an ethnographic, and indeed qualitative, approach is the production of "*thick*" data (Hammersley, 1990, in Denscombe, 1989. p.72 Robson, 2002. p.186), that is, data rich in the descriptions of the stakeholders studied. Such data was considered vital in understanding stakeholder perceptions to the research subject, and instrumental in adopting a more qualitative approach.

3.2.2. Data collection: issues of qualitative & quantitative approaches.

The mixed methods research approach adopted enabled aspects of both qualitative and quantitative research to be used in data collection, thus eliciting a greater range of data to be investigated. Within this mixed method approach, a qualitative research approach was adopted as the primary data collection method, through the process of conducting

interviews and surveys of visitors and recreational and leisure businesses. Quantitative data on visitor numbers and financial considerations, also gained through the conducting of surveys and supplemented by secondary research, was used to support and further inform the research. Noted by Kvale (1996) as tools of the research trade, and not mutually exclusive, different opinions surround the use of qualitative and quantitative data, with qualitative data in the past being thought of as a poor relation to quantitative data (Silverman, 1993; Davies, 2003). However, the aims of this research provided qualitative data with greater precedence.

Davies (2003) noted that qualitative research is sometimes undervalued, being described as "messy" and lacking rigour (Davies, 2003. p.99). Whilst Silverman (1993) noted qualitative research as a prerequisite to more rigorous quantitative research, which in itself is criticised for not considering the experiences of those being studied. However, as noted the qualitative approach allows the differing perspectives and 'world views' of interviewees to be accounted for in a manner that quantitative data would not (Kvale, 1996). The responses of those surveyed and interviewed are likely to vary according to their experiences, occupation and knowledge, thereby providing variety and 'colour' to the research. As Patton (1990) suggests, qualitative methods can produce information of greater depth and meaning, which can provide an important human element to the research findings, often lacking in quantitative research (Morrison and Teixeira, 2004). Contrastingly, quantitative research will not account for such variances, nor changes or behaviour in a real world context (Davies, 2003). For this research, however, quantitative research provided information on visitor numbers and income potential, thereby forming an important component of the data gathering process. Thus the mixed-method approach adopted enabled a fuller, more holistic picture of the research to be established (Patton, 1990; Creswell, 2003; Saunders *et al.*, 2003).

3.3.0. Section Three: Case study region selection.

Practical considerations dictated that the comparative study regions be within the UK. However, that aside, several factors were considered important in the selection of study regions to enable the research questions to be answered. Amongst these, and discussed below in the context of selecting study regions, are issues of rural and associated agricultural policy, water management, the value of wetlands and the wider environmental resource, and the potential value of a visitor market, including the potential for or existence of a visitor market.

Further to these considerations, previous, associated studies undertaken within Sheffield Hallam University (Rotherham *et al.*, 2002a, 2002c, 2005a, & 2005b) have provided an opportunity to investigate a UK region in depth through the support of the Countryside Agency (Yorkshire & Humber Office). In this respect, the current research is supported by the Countryside Agency (Yorkshire and Humber Office) both financially and with regards to accessing relevant literature and data as required. As such, the Countryside Agency has an interest in the research findings, and whilst the adoption of the Humberhead Levels as the primary case study region was undertaken in consultation with the Countryside Agency, the research objectives and methodology were developed independently, as was the undertaking of data collection and analysis. Thus the Countryside Agency adopted an advice and support role, being privy to research progress reports and presentations as and when appropriate.

3.3.1. Primary study region selection.

Of concern to the Countryside Agency is the decline in rural communities affected by the decline in agriculture, coupled with issues of land and water management. As was demonstrated by the 2001 Foot and Mouth outbreak, a crisis in the agricultural sector can have serious consequences for rural communities. This not only affects those within the agricultural sector, but also non-agricultural sectors such as the visitor and tourism market (Countryside Agency, 2001b). As a response to this potential rural decline, and in view of the holistic aspect of the countryside as a place of livelihood and leisure, the Countryside Agency launched several programmes as a means of increasing the viability of rural communities, including Countryside Capital and Land Management

Initiatives. Countryside Capital looked at the wider countryside as a multiple economic resource developed through many generations of Human activity, resulting in the much varied landscape present today. The Land Management Initiatives (LMI), however, considered the countryside as a source of agricultural production in a changing rural environment, and the implications for sustainable agriculture and landscape management on changing demands. In particular, aspects such as water management, wildlife and non-market benefits were highlighted as important in future, sustainable land management policies. Furthermore, LMIs are proposed by the Countryside Agency as a means of stemming the decline in rural incomes by working with rural communities to manage resources more sustainably, whilst encouraging less of a dependence on public funding through private investment and the retention of income in rural communities (Countryside Agency, 2001a & 2002a).

The LMI process itself identified nine UK regions for investigations, Table 6. Encompassing upland, lowland, arable and urban fringe areas, two regions in particular offered similarities with studies previously undertaken at Sheffield Hallam University: Severn-Vyrnwy and the Humberhead Levels. Both regions contain issues of water and wetland management, and the potential for landscape management based around the development of a wetland resource benefiting both wildlife and local economies through the generation of visitor spend. Of the two regions, the Humberhead Levels is the larger, at 1,718 sqkm., compared to Severn-Vyrnwy at 150 sqkm. (Countryside Agency, 2002b; CQC, 2004). Thus, in respect of their size and potential to be considered identifiable regions in their own right with their own identifiable economies and infrastructure, and less influenced by neighbouring regions, the Humberhead Levels is the more appropriate region for this study.

| | |
|-------------------------|--|
| Arable | Humberhead Levels* Norfolk |
| Lowland pastoral | High Weald Severn-Vyrnwy* South West |
| Upland | North York Moors Northumberland Peak District |
| Urban Fringe | Great North Forest |

* Floodplain regions with issues of water & wetland management.
Source: Countryside Agency, 2002a.

Table 6: Countryside Agency Land Management Initiative regions.

Previous studies (Glynwood, 1999; Chamberlain, 2000; Rotherham *et al.*, 2002b) have identified the Humberhead Levels as a region worthy of further investigation. An intensively agricultural region, with increasingly expensive water management requirements, the Humberhead Levels is a comparatively economically poor region, with few employment opportunities outside of agriculture, exacerbated since the demise of local coal mining industries, and virtually no visitor demand. In studies undertaken on behalf of the Countryside Agency, and following on from LMI-related work undertaken by Chamberlain (2000) and independently by Glynwood (1999), Rotherham *et al.*, (2002b and 2002c) and IWE (2002) considered the potential for nature-based and water-based leisure and tourism respectively to act as a means of encouraging income generation within the Humberhead Levels. Visitor and tourism facilities and potential were assessed, as was the wildlife and water resource. Local stakeholders were interviewed with regard to their views on tourism within the region, with the studies enabling a comprehensive view of the Humberhead Levels to be established. Further, site specific studies by Rotherham *et al.*, (2002a, 2005a, & 2005b) into wildlife and outdoor related leisure within the Humberhead Levels region increased understanding of issues related to nature-based leisure, and the development of such visitor attractions in areas suffering economic decline. In building on this previous body of work, this current research provides a greater insight to the Humberhead Levels as a predominantly agricultural region which may have the potential for the establishment of a nature-based recreation and leisure market. Further to this, the use of a comparative case study and lesson drawing approach (Rose, 1991; Bryman, 2001) allows the comparison and potential application of suitable findings (Baum and Hagen, 1999) from within comparative study regions to be applied to the primary study region, the Humberhead Levels. As such, the research contributes to a further understanding of nature-based recreation and leisure as an alternative economic generator within fenland and rural regions.

As a region, the Humberhead Levels offers other considerations making it suitable as a study region, factors identified in the 2002 scoping study (Rotherham *et al.*, 2002c). Whilst identified by English Nature and the Countryside Agency as a natural and landscape character area respectively, unlike much of the UK it is a region of limited public identity, an area unknown. This limited knowledge gives rise to the minimum visitor demand, as noted by the lack of visitor facilities. The flat, open, orderly, agri-industrial landscape tends not to attract many visitors, being deemed an unpopular

landscape (de Groot and van de Born, 2003; Kaltenborn and Bjerke, 2002, Strumse, 1996). The region, although crossed by motorways and railways, has limited local infrastructure and public transport. That there is little visitor or tourism infrastructure or demand to influence any findings, allows the region to be considered a 'clean sheet' in terms of a visitor study, and thus indicates the region's suitability as the primary study region, free of existing visitor impacts. Further to this, whilst the impacts of tourism on various aspects of society, including economics, social and environmental factors, are well documented (DoE, 1990; Lindberg and Johnson, 1997; Cooper *et al.*, 1998; Countryside Agency, 2000c; Dudding and Ryan, 2000; Ryan, 2003), this is less so with respect to wetlands and associated nature-based recreation and leisure. Thus the lack of tourism and recreation within the Humberhead Levels compliments the lack of nature-based recreation research in respect of wetlands, further enhancing the region as the primary study region.

However, within the region there are several aspects that have potential to be developed into visitor attractions based around the landscape, wetlands, waterways, and wildlife, as noted by Glynwood (1999), Chamberlain (2000), Rotherham *et al.* (2002b) and IWE (2002). As well as historical and archaeological sites, the region contains several nature and bird reserves, and, most promisingly as regards unique attractions, contains the UK's most important lowland peat bog at Thorne and Hatfield Moors. Although the public are permitted to visit many of these sites, as yet this is in an ad-hoc and unaccountable manner, and any impacts are unknown. Thus, through previous work undertaken on behalf of the Countryside Agency and conjunction with research interests into nature-based leisure and recreation, an in-depth understanding of the Humberhead Levels has been fostered. Furthermore and on a practical note, the locality and ease of access to the Humberhead Levels relative to Sheffield Hallam University greatly assisted in the collection of data during site visits, and engendered further understanding of the region through frequent visits encouraged by the close proximity.

Therefore, with these factors considered and the previous work undertaken, and with the continued support of the Countryside Agency, the Humberhead Levels were selected as the primary study site upon which a model for the development of nature-based leisure and recreation was developed.

3.3.2. The requirement for secondary and comparative study site selection.

In order to inform the research, and to develop a model to establish whether or not nature-based leisure and recreation is a feasible option within the Humberhead Levels, it was necessary to identify comparative study regions from which to obtain information and data. By dint of selecting the Humberhead Levels as the primary study region, comparative regions required a similar landscape type to ensure applicability. However, a limited history of visitor and leisure activity is required from which comparative data can be drawn. Practicality again dictates that such sites be within the UK, and by virtue of the Humberhead Levels being a low-lying, level landscape, regions such as the Peak and Lake Districts, along with other hilly regions, are discounted. Likewise regions with a considerable visitor or tourism economy such as Devon and Cornwall. The popularity of such regions, and the importance of tourism to their economies, further makes their selection impractical. Indeed, studies show that these are the most visited regions of the UK outside of London (Anon., 2004), and thus data from such regions would be an inappropriate comparison to a region with limited or modest visitor income.

Further to the research aims of investigating the potential for nature-based leisure in rural areas, and particularly wetland landscapes, the potential for wetland creation depends on water and land management regimes in the target areas. Thus a further requirement of the study regions is a water management regime suitable for modification, and areas of land suitable for wetland creation. The regions within the UK that have suitable water management regimes, as illustrated by the presence of internal drainage boards, are often the low-lying regions comprising the flood plains of several of the UK's river systems. Such regions are often, although not always, on or near the coast in the lower reaches of river systems, and have in the past been major wetlands of considerable ecological and community value. However, agricultural and industrial innovation, along with personal ambition and authoritarian control (Purseglove, 1989), have led to many of these areas being drained and converted to rich, often intensively managed farmland, with remnants of wetland communities remaining in less intensively cultivated areas. In common through all such former wetland areas is the requirement to manage water levels to ensure optimum conditions for agricultural production. The Fens, the Somerset Levels, the Vale of Pickering, and the Humberhead Levels are examples of such former wet, low-lying landscapes that now represent some of the UK's

richest and most productive agricultural land. However, due to increasingly frequent flood events and the viability of agricultural production in light of planned changes in agricultural subsidy regimes, changes in the way water is managed offers potential for changes in land and water management regimes that could encourage wildlife, and therefore nature-based leisure and tourism. Such potential offers visitor income-related opportunities for rural communities in these areas. In this respect, regions such as the Fens, the Vale of Pickering, and Somerset Levels lend themselves to the research as comparative study areas.

As the selected primary study region of the Humberhead Levels has little visitor history or facilities, and in consideration of the case study approach adopted by the research, it was necessary to find similar regions within the UK from which to obtain comparative information. As such, comparative case study regions required some history of visitor or tourism demand from which information could be obtained as to their current visitor status, and the importance of visitor income to those regions. By this, a model could be developed which can then be applied to the primary comparative study region, and the potential of any visitor or leisure development examined. As noted, in order to ensure continuity in the model, the primary study region must be similar to any comparative regions in landscape type and management. Furthermore, it was considered, by necessity, that such regions be distinct regions in their own right, preferably with an identity and image, good or bad, in the Public mind. Within the UK, regions of suitable size which are better known within the Public conscience include the Fens and the Somerset Levels and Moors.

In considering the above factors, comparative regions therefore must;

- Comprise less popular and less visited regions of the UK, and thus have limited visitor facilities.
- Be regions with suitable water and land management regimes, with potential to alter such regimes to benefit the ecological resource and offer alternative sources of income for rural communities.
- Contain within the selected regions aspects that could be presented to the public as reasons to visit the regions, whether the presented aspects be wildlife, historic, cultural or activity-based.
- Be of a similar landscape type with similar management processes.

3.3.3. Potential comparative study regions.

English Nature's and the Countryside Agency's (previously the Countryside Commission) joint Landscape Character Initiative map (English Nature, 1997b) and associated volumes (Countryside Commission, 1998; Countryside Agency, 1999a) were consulted to assess potential comparative study regions. The Countryside Agency's Land Management Initiatives (Countryside Agency, 2002a) and strategy document for sustainable land management (Countryside Agency, 2001a) were also consulted to give further insight to rural areas and issues within those areas which the research aims to investigate. Within these documents, issues raised include sustainable water and land management, involvement of local communities within rural initiatives, the maintenance and recovery of the agricultural sector, and the opportunity for activities outside of agriculture to be established as alternative sources of income and employment, all in conjunction with more sustainable uses of local resources. Such points complement the aims of the research.

As discussed above, in order to inform the research and provide examples of nature-based and wildlife leisure and visitor demand in similar landscape regions, it was necessary to identify regions similar to the Humberhead Levels in terms of landscape, water and land management. Ideally, such regions will have some history of visitor demand, but without that demand being the main income generator within the region.

Whilst there are many smaller regions within the UK that fit the majority of the requirements of the research, such as the Vale of Pickering, North Kent Marshes, Norfolk Broads and Romney Marsh, their often limited size precluded their use. Being comparatively small regions, they were not considered sufficiently large enough to be independent of, and thus less affected by, surrounding areas. Other regions, such as the Flow Country of Northern Scotland, are sufficiently remote from the rest of the UK that visitor interest will always be limited. With such practical considerations of potential comparative study regions noted and informed by literature previously consulted (English Nature, 1997b; Countryside Commission 1998; Countryside Agency, 1999a, 2001a, and 2002a), further literature was reviewed to obtain greater insight into regions preliminarily identified, i.e. rural regions of a low-lying, often wet nature with comparatively low visitor interest, and the potential for nature-based recreation and

leisure within them (Glynwood, 1997; Cranfield, 1997; Mills *et al.*, 2000; Rayment *et al.*, 2000; Oats, 2002; LAMP, 2002; PACEC, 2004).

A perhaps potentially obvious choice for a comparative study region is the Norfolk Broads, a landscape dependant on water management, with a public identity and a popular visitor destination. However, the Norfolk Broads were deemed inappropriate as a comparative study region, in part because of the region's long-term popularity, but also because it is a different landscape type. The Broads are comprised of flooded remnants of former peat cutting, a wet, grazing landscape amidst a highly productive arable landscape (English Nature, undated; Purseglove, 1989), almost the opposite of the Humberhead Levels, a landscape deliberately drained for arable production, containing remnants of former marsh and wetland landscapes. Whilst both regions contain rivers, canal-based waterways within the Humberhead Levels were constructed for transport, and are thus fundamentally different from the accidental creation of the 'waterways' through the abandonment of peat cuttings. Furthermore, the more enclosed landscape of the Norfolk Broads, caused by waterside reedbeds and trees, again gives a different perspective to the landscape than in the more open Humberhead Levels landscape. Whilst lessons can be drawn from the example of the Norfolk Broads as a visitor destination, it is impractical to consider the Humberhead Levels reaching the same level of popularity in the foreseeable future, thus again, as a main comparative region, the Norfolk Broads were not considered suitable.

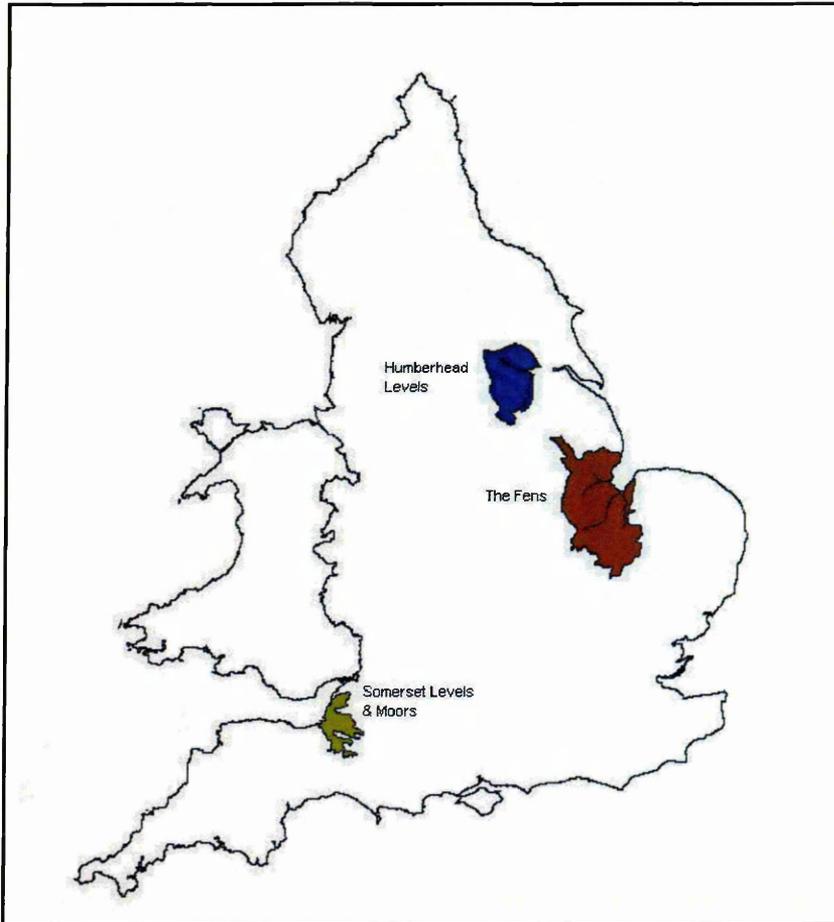
3.3.4. Comparative study region selection.

As noted, whilst there are many suitable but small areas and regions within the UK that could provide more generic information to support the research, in order to inform the research more fully, the Fens and the Somerset Levels and Moors (referred to as 'the Somerset Levels') were identified as candidate comparative regions. Both these regions are identified as natural areas and areas of individual landscape character by English Nature (1997b), the Countryside Commission (1998) and the Countryside Agency (1999a). Both regions are rural in nature, with a dependence on agriculture compromised by issues of water management, falling agricultural incomes and associated changes in agricultural subsidy regimes. As in the Humberhead Levels, settlement density is sparse. Leisure and visitor demand in both regions, and particularly

in the Somerset Levels, although comparatively limited is greater than in the Humberhead Levels, with both regions wishing to increase their share of the visitor market. Thus there exists an opportunity to apply the technique of lesson drawing (Baum & Hagen, 1999) from these regions. In particular, the Fen landscape is similar to that of the Humberhead Levels, as is the drainage history and intensive agriculture of the region, and thus offers the most appropriate comparison to the Humberhead Levels. The Somerset Levels, with a longer history of visitor demand and less intensive agriculture, provide an indication of the potential to be gained from the development of visitor demand, in conjunction with less intensive agricultural practises associated within wet landscapes. By selecting the Fens and Somerset Levels as comparative study regions, identified on Map 1 and in Table 7, the research identified three potential stages in visitor demand for similar landscapes:

- **Stage 1:** the Humberhead Levels - a region of limited visitor demand with few visitor facilities and little public profile or identity.
- **Stage 2:** The Fens - a region of increased but comparatively small visitor interest, including wildlife-based attractions, with a more acknowledged public identity (The Fens).
- **Stage 3:** The Somerset Levels - a region of greater, long-term visitor interest with a higher public identity based around the landscape, in association with well known, nearby visitor attractions (Wookey Hole, Cheddar Gorge, Weston-super-Mare, Glastonbury).

With respect to stages two and three, in terms of landscape type and visitor demand, as noted above, the Fens are more comparable to the Humberhead Levels, and as such and as informed by the research process, forms the predominant comparative study region.



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Map 1: Map of the locations of the Humberhead Levels, the Fens, and the Somerset Levels & Moors.

| | Humberhead Levels | | The Fens | | Somerset Levels & Moors | |
|---|--|--------------|--|--------------|--|--------------|
| Area (approx.) | 1718 sq km | | 3826 sq km | | 657 sq km | |
| Landscape character | Open, level landscape. At or below sea level, & traversed by drainage dykes & major rivers; the Ouse, Trent, and Humber Estuary. Requires extensive water management to maintain agricultural productivity. Intensive, arable agriculture, with small areas of enclosed fields. Former peat cutting industry now ceased operation. | | Characterised by rich soils, an intensive & productive agricultural region. Low-lying, rarely 10m above sea level, excepting 'islands' such as Ely. Limited woodland cover. Influenced by numerous drainage dykes and rivers, and extensive water management. Areas of marsh, wet meadow & reedbed indicate past vegetation. | | Low-lying, at or near sea level requiring extensive water management. Extensive agriculture based around livestock grazing, hay & silage production, & some willow beds. Orchards & associated industries on higher ground. Numerous drainage dykes, or rhynes, and rivers. Localised peat cutting industry. | |
| Centres of population | Doncaster & surroundings, Selby, Thorne, Goole, Howden, Bawtry, Epworth. | | Ely, Boston, Spalding, King's Lynn, Wisbech, Chatteris, Downham Market, Holbeach, March, Whittlesey. | | Bridgewater, Langport, Highbridge, Street-Glastonbury. | |
| Urban area¹ | 11121 Ha | 6.5% of CCA* | 13109 Ha | 3.4% of CCA | 5256 Ha | 8% of CCA |
| Cultivated area (June 1998 census) | 133406 Ha | 77.6% of CCA | 335346 Ha | 87.6% of CCA | 46599 Ha | 70.8% of CCA |
| Woodland area | 6388 Ha | 3.7% of CCA | 1716 Ha | 0.4% of CCA | 663 Ha | 1% of CCA |
| National nature reserve area | 1707.4 Ha | 1% of CCA | 1376.4 Ha | 0.36% of CCA | 1130.3 Ha | 2% of CCA |
| Site of special scientific interest area | 5538 Ha | 3.2% of CCA | 8826 Ha | 2.3% of CCA | 8306 Ha | 12.6% of CCA |
| Wildlife interest | Internationally important peatland at Thorne & Hatfield Moors, with areas of fen and reed. Important for rare flora and fauna species. | | Numerous wetland related habitats; swamp, reedbeds, wet meadow & neutral grassland. Nationally important area for migrating wildfowl. Examples of relic fen at Wicken, Woodwalton & Holme. | | UK's largest area of lowland wet grassland. Internationally important wetland habitat for wintering wildfowl and breeding waders. | |
| History & archaeology | Contains areas of historic and archaeological interest & importance, including battlefields, open field systems, 'cable' landscape & Sutton Common Iron Age site. History of the drainage of the region. | | Contains Flag Fen Bronze Age site, evidence of Roman drainage systems, & with numerous Bronze, Iron Age and Roman archaeological sites in the Fen margins. Detailed history of the drainage of the Fens. | | Historic landscape evidenced by prehistoric trackways, including the 'Sweet Track', lake villages and enclosures. More recent features include pollarded willows and neglected orchards. Site of last battle on English soil. | |

NOTE: All figures approximate. There is some discrepancy in the square kilometre and square mile area calculations given for the regions covered in documents accessed for information purposes. This may be due to differing agencies and organisations adopting differing boundaries for the same areas, and the use of differing conversion factors in calculations. For the purposes of this table, all area and related figures are sourced from CQC, 2004.

*Countryside Character Area.

¹ODPM 2001 urban area definition as in CQC, 2004.

Source; English Nature, 1997a; CQC. 2004.

Table 7: Comparative study regions.

3.3.5. Primary and comparative study regions; an introduction.

3.3.5.1. Humberhead Levels.

The Humberhead Levels, Map 2, is a predominantly flat, low-lying and intensively farmed landscape. Encompassing around 1,718 square kilometres, the region is one of the UK's most productive agricultural landscapes (CQC, 2004; Smith, 2004). Much of the land is at or below sea level, with several rivers traversing the region into which numerous drainage dykes flow. Beset by both an excess of water in winter and too little water in summer, water management through irrigation and drainage is a critical factor in maintaining agricultural production. On higher land within the region, areas of more traditional agriculture and historic landscape occur, presenting a more intimate landscape of hedges and trees missing in the more modern, agri-industry landscape. Wide open skies dominate views punctuated by vertical elements of cooling towers, pylons and farm buildings. A landscape rich in archaeological sites, remnants of former wetlands also exist, reminders of the landscape before extensive drainage began in the 17th century (Countryside Agency, 1999a; Chamberlain, 2000; Stedman, 2003).

The Humberhead Levels region is defined by the Countryside Agency's and English Nature's Landscape Character and Natural Area assessment (English Nature, 1997b; Countryside Commission, 1998), and as such the region encompasses areas of several Local Authorities, government and non-government agencies. Consequently, there is no single organisation responsible for the region in an integrated manner, and thus obtaining information regarding the region as a separate entity from other regions is less than straightforward.

Communities within the region are small, dispersed and often on the few areas of higher land within the region. Outside of agriculture, and aside from the engineering-based employment of Doncaster, employment and income opportunities are few. Whilst coal mining and associated industries have in the past provided employment, the closure of local coal mines, and also the local peat cutting industry, has removed this opportunity. Although unemployment levels within urban areas within the region are comparable with the UK national average of 4.6% (National Statistics, 2004), studies by Rotherham *et al.*, (2005a & 2005b) suggest that such statistics mask the true levels of deprivation

3.3.5.2. The Fens.

The Fen landscape is similar to the Humberhead Levels, and both regions have a similar history of being drained and converted to rich agricultural landscapes. The Fens, Map 3, cover an area of approximately 3,826 square kilometres (CQC, 2004), and are comprised of several Local Authority areas. As with the Humberhead Levels, the Fens are defined by English Nature and the Countryside Agency as a natural area, as does English Heritage (Oates, 2002). The open landscape and lack of trees present a visual image similar to the Humberhead Levels, with both regions containing areas of higher land upon which the majority of the dispersed settlements are located. The presence of Cambridge and Ely, as well as major road and mainline railway routes, encourage visitors into the region, as do Spalding and Boston in the north of the Fens. Although visitors frequent the Fens in comparatively greater numbers than the Humberhead Levels, nonetheless, the two regions share much in common regarding visitor facilities, with visitors numbers being low compared to other UK regions. Oates (2002) notes that visitors complain of a lack of attractive landscapes, long distances to travel, and a general lack of car parks, cafés and toilets. However, in other respects, the Fens are more advanced in visitor and tourism potential than the Humberhead Levels, and thus offer opportunities for comparative investigation. Whilst tourism in the region is generally underdeveloped, sites such as Cambridge and Ely are well known and a regular visitor draw. The UK's first wetland nature reserve, established in 1899 by the National Trust at Wicken Fen, is now a popular visitor destination (Purseglove, 1989), whilst Flag Fen, located adjacent to Peterborough and one of the UK's pre-eminent Bronze Age sites, offers an illustration of how the Sutton Common Iron Age site near Askern in the Humberhead Levels could be developed. A new visitor attraction, 'Fenscape', developed at a cost of £1.2 million and situated at Spalding, demonstrates the commitment of the Fens Tourism Group in not only dispelling the unfavourable, bleak, flat and boring image of the Fens, but also to developing the Fens as a visitor destination rich in history and a unique way of life (AHI, 2004). With respect to wildlife, the RSPB manage several reserves within the Fens, with further reserve development being planned. Such reserves not only benefit wildlife, but also visitors, local communities and local economies (Rayment *et al.*, 2000; RSPB, 2001; Rayment & Dickie, 2001). The Wetland and Wildfowl Trust's Welney Centre, which has no comparable in the Humberhead Levels, is one of the more popular destinations within the Fens, and, though under-used, the Fens contain more waterways than the ever

popular Norfolk Broads (Oates. 2002). As with the Humberhead Levels, the use of the waterways is encouraged, and several marinas are located within the region.

Unlike the Humberhead Levels, the Fens have never contained areas of heavy industry, having predominantly relied upon an agricultural economy. However, in line with the rest of the UK, agricultural incomes have dropped, and increased mechanisation has seen employment demand decrease in recent decades. Furthermore, the longevity of agricultural production relies on the fertility of the peaty soil. At current rates of erosion and decreasing soil fertility, up to 80% of the peat soils present in the Fens could become exhausted within 30 years (Oates, 2002). Thus agricultural investment will be located elsewhere, with such a scenario being compounded by increasing demands on water supplies. Consequently employment and income levels may fall, and the viability of the Fens economy and communities could fail. As a counter to this, wetlands are being considered as a way of improving the landscape and wildlife resource, maintaining water supplies, and as a way of attracting investment, in part through visitor and tourism demand (Oats, 2002; PACEC, 2004). Thus there is potential for developing alternative employment and income sources for the benefit of local communities. The Fens therefore offer a comparative region with several wetland projects under development, providing a potential insight into the development of the Humberhead Levels region with respect to visitor demand based around nature-based leisure and recreation. In conjunction with this is the potential for improved water management, an improved wildlife resource, and social benefits for local communities.



Map supplied by the Countryside Agency.
Not to scale.

Map 3: The Fens.

3.3.5.3. The Somerset Levels.

The Somerset Levels and Moors, Map 4, in common with both the Humberhead Levels and the Fens, lie close to sea level, and are prone to flooding. Traversed by numerous drainage dykes, or rhyes, and rivers, efficient drainage and water management is paramount to maintaining the productivity and protecting settlements within the region

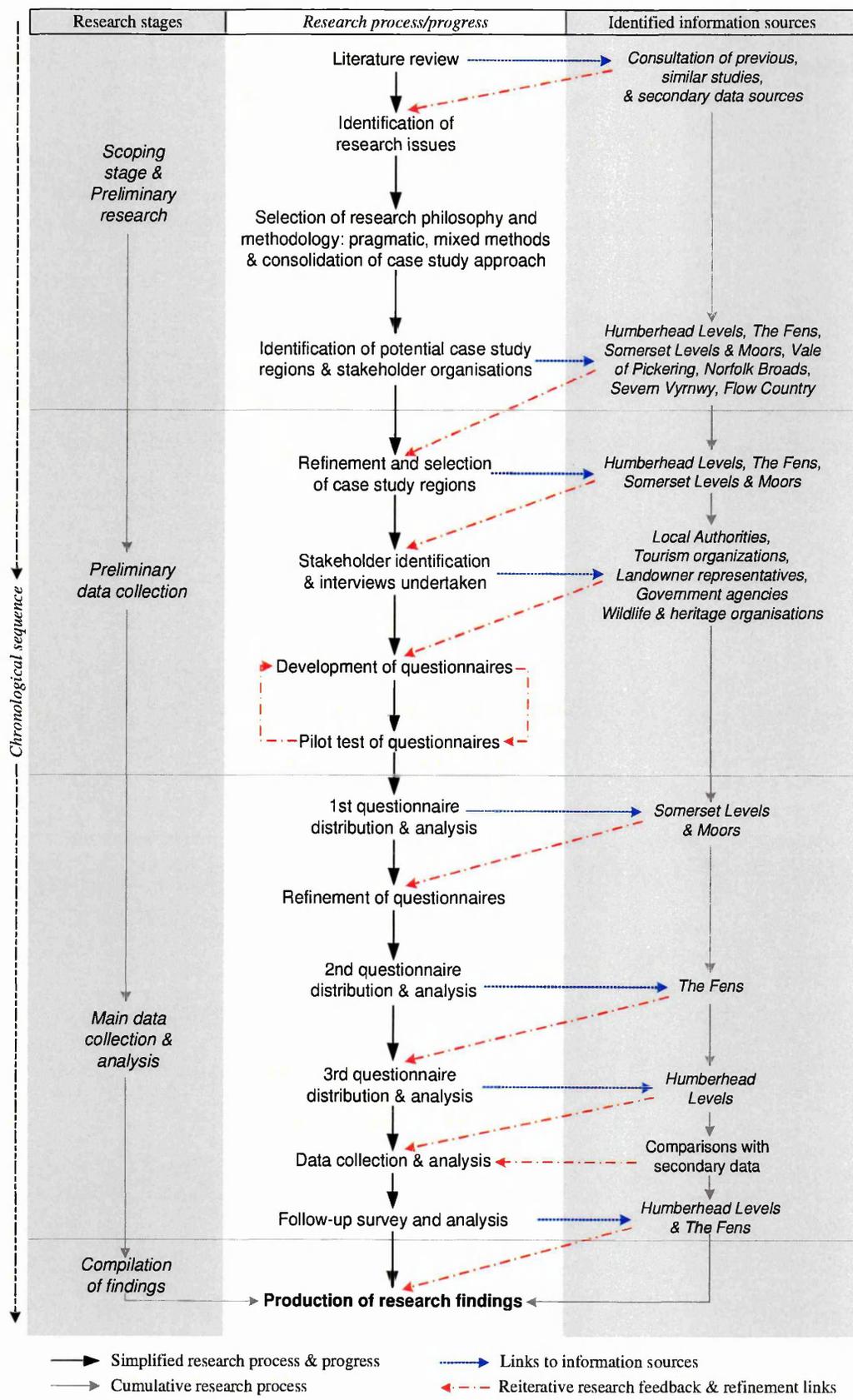
(Mills *et al.*, 2000). A comparatively small region, comprising around 657 square kilometres (CQC, 2004), the Somerset Levels and Moors are one of the largest and most important lowland wetland meadow sites within the UK (Glynwood, 1997; LAMP, 2002), and are identified as a natural area by English Nature and the Countryside Agency (English Nature, 1997b; Countryside Commission, 1998). Similar to the Humberhead Levels, the local peat cutting industry has, in the past, provided income and employment for local populations. However, though still in operation, the peat industry is much reduced. Several of the former peat cutting areas are now owned by the RSPB and English Nature, and form the basis of local nature reserves, and thus are an attraction for visitors with corresponding benefits for the local economy. Similarly, the former peat cutting areas of Thorne and Hatfield Moors in the Humberhead Levels are now owned and managed by English Nature, with a view to developing the sites as wildlife reserves and visitor attractions.

Sparsely populated with communities on higher ground, the predominantly agricultural Levels and Moors region consists of wet pasture, with arable and fruit orchards where conditions permit. Unlike the Humberhead Levels or the Fens, agricultural holdings are relatively small, and agricultural production extensive, with indications that take-up of agri-environment schemes may increase agricultural extensification (Mills *et al.*, 2000). However, declining farm incomes may also encourage farmers to cease agricultural operations, relinquishing land for other use, including development, with a possible move towards large-scale agricultural production. Through recent changes in land management, some areas of the Somerset Levels and Moors contain numerous trees which limit the views found elsewhere in the more open and actively managed landscape. Employment opportunities within the region are limited, with local communities' dependant on surrounding towns for employment and services. In common with the Humberhead Levels, public transport is poor, and a reliance on personal transport is evident (Mills *et al.*, 2000).

Tourism, although described as underdeveloped and with a poor public recognition (Mills *et al.*, 2000), is nonetheless more developed than in the Humberhead Levels. Much of the tourism is based around conservation, historic and cultural attractions and the rural landscape, with visitors comprising day-trippers and specialist markets, including wildlife and fishing. With a predominantly older demographic make-up, around a third of visitors are believed to be National Trust or RSPB members. Marketed

3.3.6. Illustration of the research process and selection of case study regions.

Following the identification of the primary and secondary case study regions, it was necessary to undertake a stakeholder analysis, as noted earlier, and thus informed by information obtained through interviewing stakeholder organisations, then commence the process of data collection from visitors and recreation businesses within the case study regions, as discussed in section 3.4.0. With data thus obtained, Figure 7 details an illustration of the research process undertaken by this research, and the manner in which the data obtained from the secondary case study regions of the Fens and Somerset Levels informed the research process and the potential for nature-based recreation and leisure within the Humberhead Levels.



After Bryman, 2001, & Babbie, 1998.

Figure 7; An illustration of the research processes undertaken.

3.4.0. Section Four: Data Collection.

Primary data collection was undertaken between March and November, 2004, through the conduction of interviews, planned and unplanned, and the distribution of questionnaires. Neither of these processes is without limitations, and each is discussed in the context of their use in sections 3.4.3., and 3.4.13. and following. With respect to the planned interviews conducted, whilst the data obtained are considered valuable, the interviews were conducted primarily to gain further understanding of the subject matter and the issues involved, much in the manner of the Delphi technique (Veal, 1997; Saunders *et al.*, 2003). Identified through stakeholder analysis and the use of snowball and chain-sampling methods (Patton, 1990; Mills *et al.*, 2000), information provided by interviewees, detailed in Table 8, enabled comparisons to be made with previous research into the Humberhead Levels (Rotherham *et al.*, 2002b and 2002c), and progress assessed, therefore aiding in refining the research process (Saunders *et al.*, 2003). Although undertaken as an aid to the research process, nonetheless, data obtained during planned interviews is considered relevant, and thus, where appropriate, is referred to within the discussion text.

3.4.1. Stakeholder identification.

Stakeholder analysis, with its origins associated with business, economic theory and early industrialism (Chevalier, 2001), enabled the identification of key personnel and interest groups relevant to the research to be undertaken (Mills *et al.*, 2000). As a flexible concept, stakeholder analysis, widely used across a variety of disciplines including environmental and policy concerns, enables a concentration on issues, opportunities and individuals associated with a project or development, for example (Chevalier, 2001). With respect to this research, whilst the comparative study approach adopted entailed focussing on stakeholders in specific regions, and interviewing and surveying relatively few people, this approach, noted Veal (1992), can nonetheless often provide a rich source of information.

The stakeholder analysis was initially undertaken through contacts established through previous work (Rotherham *et al.*, 2002b), and continued by accessing literature associated with the research and study regions. The potential for bias and selectiveness

being introduced by the researcher into the stakeholder analysis, and indeed questionnaire design and into the research in general, is noted, as is the potential to miss user groups out of a stakeholder analysis (Mills *et al.*, 2000; Allen and Kilvington, 2001). Whilst such bias can be noted and accounted for to some degree, it should also be noted that an individual's upbringing, life style and employment, whether the researcher or research subject, could influence questions asked and answers given, resulting in data collected being "*pre-conceptualised*" (Sayer, 1992, p.52). Thus it is important to obtain data from as broad a range of stakeholders as practical to prevent undue bias being introduced through an overly selective stakeholder analysis, with consequences for the data obtained.

3.4.2. Snowball & chain sampling.

As well as contacting known individuals and those deemed suitable for interviews due to their occupation and experience, via a stakeholder analysis, the research also adopted the method of snowball or chain sampling (Patton, 1990; Denscombe, 1998; Mills *et al.*, 2000) in order to obtain wider but relevant viewpoints, and thus lessen the chance of omitting user-groups from the study. Although not guaranteeing a representative sample, snowball and chain sampling in effect equates to subject or case identification by the recommendation of others. The method has practical advantages for qualitative research in that it can account for populations often missed in more rigid research methods (Hendricks *et al.*, 1992; Atkinson and Flint, 2001; Boys *et al.*, 2001; Thompson and Collins, 2002), as well as identifying issues linked to the research (Denscombe, 1998). A further advantage of snowball sampling is that it allows the investigation of aspects of social experience often missed by researchers and non-specialist personnel (Atkinson and Flint, 2001). Used in previous, similar studies (Rotherham *et al.*, 2002a, 2002b, & 2005a; Crowe *et al.*, 2002), this method allowed those people not represented on official bodies or organisations, but with relevant experience within the research region, to be contacted and their views noted. In order to ensure only relevant individuals were identified, reasons for recommendations were sought, and only those deemed most appropriate to the research contacted.

3.4.3. Interview procedure.

Although undertaken primarily as a method of understanding the research topic in greater detail, the process of conducting interviews is nonetheless important. The interviews themselves enabled an understanding of the research topic to be ascertained from the perspective of the interviewees, enabling their 'world views' to be obtained (Kvale, 1996). It is this viewpoint of the individual that differentiates the less structured qualitative interview approach from more a structured interview designed to obtain quantitative data and answers to set questions (Bryman, 2001). Through the use of an interview guide, i.e. a list of topics to be discussed and questions to be asked, interviews of a semi-structured, exploratory nature were undertaken (Oppenheim, 1992; Bryman, 2001). As such, and in respect of the research aims, objectives and aspects related to nature-based recreation and leisure detailed in Figure 4, interview guides and questions were tailored to meet the experiences and expertise of the selected interviewees (Rilla, 2004), thus enabling the collection of pertinent data that informed the research process. Factors such as experience and expertise can have a bearing on an individuals preferences, beliefs and opinions (Brush *et al.*, 2000), and thus can act as a "*cultural filter*" (Pepper, 1986. p.6) with respect to their responses, and thus in effect potentially introduce a bias, as previously noted. The use of a semi-structured interview format and open ended questions allowed the interviews to be directed according to the interviewee's responses, thus enabling a greater range of responses to be elicited. This approach allowed issues raised during interviews to be further investigated, with a greater depth of detail and insight providing more holistic results (Patton, 1990; Bryman, 2001). Interview guides and questions are detailed within Appendix Three.

With the aspects and themes detailed in Figure 4 providing structure for the research, the interviews undertaken were of necessity related to those themes. Thus it was important to contact organisations who could inform the research. As such, organisations considered important included:

- Local Authorities with reference to local tourism, visitor policy and local involvement.
- Government-related organisations with respect to wider, rural policy issues and funding opportunities, including support for visitor and tourism initiatives.

- Representatives of landowners with respect to issues of agricultural production, water and wildlife management, and issues of tourism, wetlands and wildlife potentially impinging on agricultural production.
- Tourism organisations and providers within the study regions to ascertain existing and potential levels of tourism and visitor within those regions.
- Wildlife organisations within the study regions to obtain information on the potential for wildlife and nature-based recreation and leisure, including potential conflicts detrimental to wildlife. Such organisations also provided information on existing wetland development within the case study regions.
- National heritage and water-related organisations considered to potentially have a visitor interest within the study region of the Humberhead Levels.

Identified through the use of a stakeholder analysis and through the use of the 'snowball' sampling technique relevant to the criteria detailed above, an initial list of potential contacts was compiled. Potential interviewees were prioritised according to their connection with the primary and comparative study regions, and their area of expertise. Once identified and prioritised, individuals were contacted in order to arrange interviews. Of those contacted, two declined to be interviewed. In total, fourteen face-to-face interviews were conducted, with a further six interviews conducted via telephone, with one other respondent providing an e-mail response due to time considerations. All but one of the interviews conducted in person were recorded, with the interviews being transcribed verbatim as soon as practicable after the interview. The interview not recorded was undertaken in an opportunistic manner as the chance arose, with notes being made immediately after. Notes were also made during and immediately after personal interviews to supplement recordings and to allow for failure of recording equipment. In the one instance where a planned interview in person was not possible, a telephone interview was conducted as a substitute. Similar methods used in previous studies have proved to yield useful data (Blanksby and Doncaster, 2000; Crowe *et al.*, 2002; Rotherham *et al.*, 2002a & 2002b, & 2005a). Table 8 details organisations contacted and interviewed.

| Organisation | Study Region association | Interview date | Method |
|--|--------------------------|----------------|-----------------|
| Somerset Levels & Moors Project, (a). | SL&M | 12/3/2004 | in person |
| Willows & Wetlands Centre, Somerset. | SL&M | 12/3/2004 | in person-NR |
| Lincolnshire Tourism. | HHL | 23/3/2004 | telephone-NR |
| Great Fen Project & Cambridgeshire Wildlife Trust. | Fens | 25/3/2004 | telephone-NR |
| Humberhead Levels Green Tourism Forum. | HHL | 26/3/2004 | in person |
| Fishlake Fine Foods. | HHL | 26/3/2004 | in person |
| NFU East Midlands. | HHL/Fens | 30/3/2004 | telephone-NR |
| NFU North East. | HHL | 30/3/2004 | telephone-NR |
| NFU East Anglia. | Fens | 31/3/2004 | telephone-NR |
| North Lincolnshire Tourism. | HHL | 6/4/2004 | in person |
| Doncaster Tourism Development, Doncaster Metropolitan Borough Council. | HHL | 14/4/2004 | in person |
| Rural Development Service, DEFRA, Leeds. | HHL | 19/4/2004 | in person |
| Selby District Council Tourism Department. | HHL | 19/4/2004 | in person |
| National Trust, East Midlands. | HHL | 20/4/2004 | e-mail response |
| Fens Tourism Group. | Fens | 21/4/2004 | in person |
| Tourism & Economic Development Department, East Riding of Yorkshire Council. | HHL | 23/4/2004 | in person |
| Country Landowners & Business Association. | HHL/Fens | 11/5/2004 | in person |
| British Waterways, Yorkshire. | HHL | 14/5/2004 | in person |
| South Yorkshire Business Link. | HHL | 19/5/2004 | in person |
| Somerset Levels & Moors Project, (b). | SL&M | 1/6/2004 | in person |
| English Nature, Humber to Pennines Region. | HHL | 5/11/04 | telephone-NR |

NR: Denotes not recorded - from notes made during/after interview.
HHL: Humberhead Levels. SL&M: Somerset Levels and Moors.

Table 8: List of interviewee organisations.

Whilst all of the interviewees allowed the interviews to be recorded for later transcription, once the interview had been conducted, and the recorder switched off, several interviewees continued to elaborate on their subject. Bryman (2001. p.323., referencing Hammersley and Atkinson, 1995., and Parker, 2000) suggests that such "*unsolicited accounts*" can often provide more informative and significant data than the interview itself. As such, information obtained within an interview and through following, unsolicited accounts enabled a refinement of the overall, subsequent interview process. Thus, matters raised during interviews and considered to be of importance were explored further during following interviews. In this manner, not only was the interview process refined, but the overall research process benefited from a more focussed approach as a result of the refinement of the interview process. Such links between data collection and on-going analysis are noted further within section 3.5.0.

With respect to unsolicited accounts gained following the more formal interviews, notes of such data were made as soon as possible after the interview. In order to maintain the anonymity of those interviewed, data thus obtained, as with data from recorded

interviews, is done so within the text with reference to organisations rather than individuals, whilst being identified as 'survey data'.

3.4.4. Secondary, 'ad hoc' interviews.

Whilst the interviews detailed above were planned, occasions arose where on the spot interviews were possible. Such occurrences occurred often as a result of the snowball process, in which recommended contacts or general enquiries resulted in impromptu 'interviews'. Of greater frequency were *ad hoc* interviews resulting from the distribution of questionnaires. During the data collection period, in many instances, individuals approached for the purposes of questionnaire distribution were engaged in conversations, conversations often instigated by the questionnaire recipient, whether a visitor or leisure and recreation business operator. In total, approximately ninety visitor-related and seventy leisure and recreation business related secondary 'interviews' occurred, ranging from one line comments to lengthy discussions. Such instances often yielded useful insights into issues related to the research topic, (as well as less useful data), adding further depth to the data gained through questionnaires and furthermore providing data for when questionnaires were not returned. Thus such *ad hoc* interviews represented and provided a hitherto unrecognised and impromptu source of qualitative data. This supported and often substituted data gained through questionnaire distribution, effectively increasing the 'response rate' of questionnaire distribution by default.

3.4.5. Research sample selection.

Much research is dependant on the cases, or subjects, in question being representative of the wider population, whether that population is confined to a single type, e.g. men, or to the whole population of a country. Representativeness allows conclusions to be drawn from using a study sample that is representative to the wider population. However, with respect to qualitative studies, in particular those with small sample populations, this is not always possible. Representativeness is not always a requirement, particularly if the research is investigating an understanding of social interactions from which theories can be developed (Gilbert, 1993). Furthermore and with respect to the case study approach partially adopted in this instance, "*case studies*" as Black (1999,

p.48) notes, "*do not use representative samples*", but seek to understand in detail the selected study subject, without necessarily generalizing to the wider population.

The use of a stakeholder analysis to identify interview subjects precludes any consideration of representativeness. The subjects identified are considered knowledgeable and expert in their field, and thus are not expected to represent a wider population. Additionally, the use of snowball and chain sampling further reduces representativeness, reliant as it is on personal contacts and recommendations between individuals to identify interview subjects (Gilbert, 1993; Beardsworth and Keil, 1992, in Bryman, 2001).

In considering the potential for nature-based leisure and recreation, the research is targeting a specific visitor market and related leisure businesses through the distribution of questionnaires. That these visitors and businesses may in actuality be representative of a wider, UK visitor-related industry is of little consequence for the research, and indeed difficult to ascertain. Of more relevance are the reasons that visitors visit the selected study regions and the attractions within those regions, including the impacts on the local, related businesses. Thus, to this end, the research adopted a non-probability, purposive sampling method, in which representativeness is considered less important.

3.4.6. Sampling techniques.

According to Denscombe (1998) and de Vaus (1991), there are two main sampling techniques available for social research: probability and non-probability sampling. Within these are several sub-techniques that can be used depending on requirements.

3.4.6.1. Probability sampling.

Probability sampling relies on foreknowledge of the research population and samples, in that population representativeness can be expected in the research sample (Bryman, 2001). Using this foreknowledge, the research sample can be selected to ensure representativeness in the wider population by the use of random, systematic, stratified and quota techniques. Thus quota and stratified techniques ensure that elements considered essential to the research are included within the sample population, e.g. male

and female, adults and children, either in proportion to the wider population for stratified sampling, or with quotas being decided by the researcher before hand. Random sampling, as the name suggests, selects sample cases at random, whilst systematic sampling adopts a similar approach, but systematically selects cases from the wider population in a sequence chosen at random by the researcher. However, not only do such techniques require foreknowledge of the wider population, but often high numbers of cases to ensure representativeness. Without high numbers, and particularly in relation to quotas and low case numbers, statistical bias can be encountered. Such options are not always available, thus non-probability sampling offers an alternative (de Vaus, 1991; Denscombe, 1998).

It should be noted, however, that whilst the purpose of quota sampling is agreed upon, there is some disagreement as to whether it is a probability or non-probability sampling technique. Denscombe (1998) suggests quota sampling resides under probability sampling, where as Gilbert (1993), Bryman (2001), and Robson (2002) suggests it belongs under non-probability sampling. Thus, as with much social research, there is room for discussion.

3.4.6.2. Non-probability sampling.

Non-probability sampling, according to Bryman (2001, p.97) is an "*umbrella term*" used to encompass all sampling techniques that fail to meet the requirements of probability sampling. Whilst this may be so, non-probability sampling offers criteria that suit social research based upon an understanding of the research topic, and thus adopting a more targeted approach. An allowance is also made for research using comparatively small numbers of cases, with a limited knowledge of the wider population and thus little opportunity to select a representative sample. A critical difference between probability and non-probability sampling is the element of randomness. In non-probability sampling, the identification of samples is not a random process, but rather done with a purpose to inform the research on the basis of existing criteria (Denscombe, 1998). Within non-probability sampling, two main sub-techniques exist appropriate to this research; purposive and snowball sampling, with each being discussed in the context of their use in this research, below.

3.4.6.3. Survey sample techniques adopted.

3.4.6.3i. Visitor surveys: adoption of the probability sampling technique.

In consideration of the above factors relating to probability sampling, and in conjunction with foreknowledge of the research topic (Rotherham *et al.*, 2002a & 2002b), with respect to the surveying of visitors to attractions within the case study regions, probability sampling was the technique adopted. As such, probability sampling allows for representativeness within the sample population (Saunders *et al.*, 2003), i.e. those who returned questionnaires, thus enabling statistical analysis where appropriate.

3.4.6.3ii. Use of a stratified sampling technique.

In order to maintain representativeness with respect to allowances for potential difference in visitor profiles on different days, as further discussed in section 3.4.12.2., aspects of stratified sampling were adopted (Saunders *et al.*, 2003). As such, sampling was undertaken on differing days in such a manner as to aim to capture a full cross-section of visitor types. Thus an element of control was introduced to the data collection, allowing for more representative findings and therefore a greater generalisation of research findings with respect to the larger, non-sampled visitor population (Denscombe, 1998).

3.4.6.3iii. Adopted elements of a cluster sampling technique.

In conjunction with stratified sampling, and with considerations of cost and time, the research also adopted elements of cluster sampling. Concurrent with stratified sampling (Denscombe, 1998; Bryman, 2001), cluster sampling allows for the targeting of sample populations occurring naturally. In the case of this research, such sample populations included visitors to targeted nature-based attractions, thus presenting an opportunity to maximise questionnaire distribution amongst a rich data source (Saunders *et al.*, 2003), i.e. visitors to nature-based attractions.

3.4.6.3iv. The convenience of sampling.

Whilst numerous authors (Denscombe, 1998; Bryman, 2001; Saunders *et al.*, 2003) commend the virtues of adopting a methodological approach to identifying samples in order to undertake research, in reality, and in respect of distributing questionnaires, the practicality of physically identifying and approaching samples for questionnaire distribution contains an element of convenience sampling. Whilst for example it might be methodologically correct to sample every fourth or fifth person, such an approach is not always possible or desirable. This is particularly so if time and cost constraints limit the number of site visits. In respect to this research, visitor questionnaires were distributed to as many visitors as was practical and convenient on the days of site visits. Such convenience sampling is not unknown nor uncommon in social research, but not particularly recommended as the sole criteria for identifying samples (Denscombe, 1998; Bryman, 2001). Lacking research rigour (Denscombe, 1998), convenience sampling does not necessarily equate to representativeness, and thus potentially introduces bias into research samples (Saunders *et al.*, 2003). As a result, although less of an issue in homogenous sample populations, convenience sampling can reduce the applicability of generalisations made from research findings. Thus its use can be questioned.

Although not considered a rigorous research method, nonetheless, within the context of this research, convenience sampling offered an opportunity to obtain rich data relatively quickly and efficiently, with issues of lack of representativeness reduced through the concurrent use of elements of stratified and cluster sampling techniques. Aided by research foreknowledge (Rotherham *et al.*, 2002a & 2002b), convenience sampling enabled access to "*cases which are easy to get to and hospitable to our enquiry*" (Stake, 1995, in Denscombe, 1998, p.17), or as succinctly put by Bryman (2001, p.97) as an "*opportunity to good to miss*". As such, and armed with foreknowledge, convenience sampling adheres to the pragmatic and practical approach adopted by this research.

3.4.6.3v. Recreation business surveys and stakeholder interviews: The adoption of non-probability, purposive sampling.

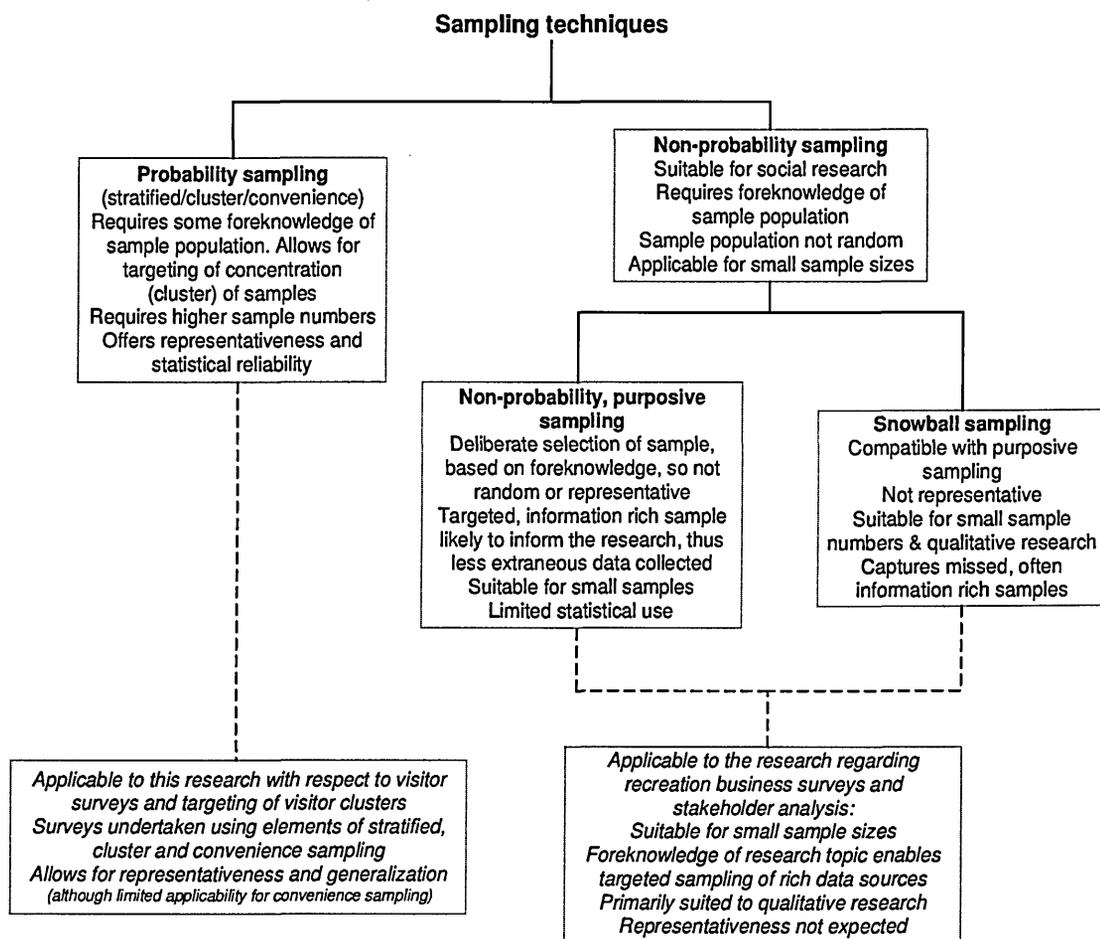
Non-probability, purposive sampling was identified as the sampling technique for this research with respect to stakeholder analysis and identification and survey of recreation

businesses. Through previous work (Rotherham *et al.*, 2002a & 2002b), and in conjunction with Rotherham *et al.* (2005b), knowledge of the research topic, stakeholders and visitors had been acquired, and thus encouraged the targeting of known, potentially rich data sources as suited for purposive sampling (Patton, 2002). Purposive sampling therefore enabled a deliberate selection of samples, in this case visitor attractions and stakeholder organisations, to be identified and questionnaires distributed, in order to satisfy the research requirements (Robson, 2002). Further to this, purposive sampling is not only a suitable approach for case study research, but also suitable for use with relatively small sample numbers (Saunders *et al.*, 2003), and as such fitted the case study research methodology adopted. As Denscombe (1998, p.15) notes, the knowledge of the research subject enables a targeting and selection of specific elements that would be most likely to inform the research, thus allowing a homing in "*on people or events which there are good grounds for believing will be critical for the research*". Whilst not a random process nor necessarily producing a representative sample (de Vaus, 1991), such a targeted approach can lessen the collection of extraneous data, with benefits for data relevance, analysis and research focus, as well as time and cost implications.

3.4.6.3vi. Snowball sampling.

As noted in section 3.4.2., snowball sampling was also adopted as a technique to identify interview subjects, and is discussed in that section. Both Denscombe (1998) and Robson (2002) note the compatibility of snowball sampling with purposive sampling, and thus both techniques are complimentary and appropriate for the selection of the research samples.

Figure 8 illustrates sampling techniques considered and adopted for the research data gathering processes.



After Saunders *et al.*, 2003, & sourced from Denscombe, 1998; de Vaus, 1991; Bryman, 2001.

Figure 8: Adopted sampling techniques.

3.4.7. Random elements.

Whilst the use of non-probability, purposive and snowball sampling removes much of the randomness from the research samples, an element of randomness is included within the sample selection. The visitors approached with a view to questionnaire distribution are present at visitor attractions by their own accord, and were therefore a 'convenience sample', according to Bryman (2001). With respect to recreation businesses, questionnaires could only be distributed to business proprietors if they were present on the day of questionnaire distribution, which was not always the case. Thus questionnaires were distributed on the basis of identified samples being present on the days of research site visits, the random element being the individual's freedom of choice with respect to visiting the attraction in the case of visitors, or being present at their place of business for recreation business proprietors. Further to this, a random element also exists with respect to an individual's decision to complete and return the questionnaire.

3.4.8. Questionnaires: advantages & disadvantages.

The use of questionnaires in the research allowed for the collection of standardized, quantitative data from the research subjects (Denscombe, 1998; Robson, 2002), i.e. visitors and leisure and recreation businesses. Such data includes visitor spend, business turnover, age, sex, number of employees, rates of importance and so forth. These data provide much of the supporting information for the research, but whilst relevant, does not provide a complete picture of the research. To achieve this, questionnaires also required more qualitative, non-standardized responses, and thus the questionnaires used were designed to allow qualitative and quantitative questions to complement each other, rather than being mutually exclusive. As Gallup (1947, in de Vaus, 1991, p.87) suggests, a closed question will address the "*specific aspects*" of an issue, whilst an open question will address the "*general feelings*" of the subject.

With respect to questionnaires, the use of qualitative and quantitative-type questions is mainly referred to as 'open' and 'closed' questions (de Vaus, 1991; Oppenheim, 1992; Denscombe, 1998; Robson, 2002). In either case, to ensure useable data, questions should be clear, concise and unambiguous. For closed questions, de Vaus also uses the term "*forced-choice*" (de Vaus, 1991, p.87) because respondents are forced to select a pre-determined answer, or not answer the question at all. Forced-choice, closed questions have distinct advantages in that such questionnaires are easy to complete, and, laid out correctly, can be simple to analyse. Typical closed questions relate to age, sex, income, scales of importance, i.e. Likert Scales, or require 'yes-no' type answers. For closed questions, the potential responses given are predetermined by the question asked. For example, a person is either a male or female, and thus ticks one of two possible answers, or alternatively, ticks one of a selection of possible answers available, as in 'please tick one of the following categories', or 'rate on a scale of one to five'. By comparison, open questions allow the respondent to provide information from their perspective, and provide space to do so. Rather than offering a choice of responses, respondents are able to provide their own thoughts and opinions on questions asked, and thus offer a more qualitative, rich response relative to their experiences (de Vaus, 1991; Oppenheim, 1992; Denscombe, 1998).

Being components of qualitative and quantitative research, much of the discussion around the use of questionnaires and open and closed questions is of a similar nature.

Closed, quantitative questions can provide reliable, standardized data that can be simpler to analyse although potentially at the expense of being detached from an individual's life experiences. The survey aspect of questionnaires can also be considered "*falsely prestigious*" due to the quantitative nature (Robson, 2002, p.231). Open, qualitative-type questions can result in unrefined data that require considerable time to analyse before useable data are extracted (Denscombe, 1998). As noted by Davies (2003), qualitative results are considered less rigorous than quantitative data.

However, aside from theoretical considerations, open and closed questions have practical advantages and disadvantages. Simple, well designed questionnaires based on closed questions that are quick and easy to complete will encourage completion and aid analysis. Similarly, open ended questions will allow those who wish to elucidate their responses, potentially providing much rich and full qualitative data. However, an excess of closed questions could frustrate those who wish to add more and to qualify their responses by illustrating their experiences. An excess of open ended questions asks for increased effort from respondents, and may penalise those "*less articulate and less fluent*" (de Vaus, 1991. p.87) who feel unable to provide suitable answers. Such factors could result in an unbalanced response to questions asked (de Vaus, 1991; Denscombe, 1998). Furthermore, whilst ambiguous questions will also lessen the value of data gained from a questionnaire, the physical, aesthetic layout of a questionnaire can be instrumental in its completion (Denscombe, 1998). Thus as much attention should be paid to how the questionnaire looks as to the questions asked. A poor looking questionnaire is less likely to be completed regardless of the quality of the questions.

3.4.9. Questionnaire development.

The research undertook surveys, using questionnaires, of two separate sample sets:

1. Surveys of rural leisure and recreation businesses.
2. Surveys of visitors.

Questionnaires were designed for each sample set, and distributed during site visits to both visitor attractions and leisure and recreation businesses.

To ascertain the potential for nature-based recreation and leisure in the case study regions, and to determine visitor types, the questionnaires were designed to encompass both open-ended, qualitative questions and closed, quantitative questions. They explore the following themes:

- Economic contributions by visitors to the case study regions, i.e. visitor spend, and the turnover and potential economic contribution of recreation businesses to local economies; including questions regarding employment and purchases of local products.
- The proportional contribution and importance of visitor income to recreation businesses compared to other sources of income, and the ownership, local or otherwise, of recreation businesses.
- Perceptions of the case study regions and landscapes as places to visit, and the factors within those landscapes preferred by visitors and used by recreation businesses to attract visitors, including details of the business attraction(s).
- Visitor demographics, the home location of visitors, lengths and types of stay, and frequency of visits within the case study regions, thus identifying visitor types.

With respect to follow-up surveys of farm-based recreation businesses undertaken after the initial questionnaire distribution, questions were designed to elicit a greater understanding of the importance of visitor income to such businesses. As such, and conducted via telephone, the follow-up survey continued the approach of the initial survey questionnaires in containing a mix of open-ended, qualitative and closed, quantitative questions.

Final editions of the questionnaires and follow-up surveys used in data collection are included in Appendix Three.

3.4.9.1. Questionnaire design.

The questionnaires were designed for self-completion (Robson, 2002; Bryman, 2003). They were developed with reference to surveys and semi-structured interviews conducted in the course of previous studies (Crowe *et al.*, 2002: Rotherham *et al.*, 2002a, 2002b), and to studies carried out in similar topic areas (Bannermann, 2003;

Macaulay Institute, 2003). Demographic categories were developed with reference to standard texts and existing demographic categories used in social research (Swarbrooke, 1995; Seaton & Bennett, 1996; Lumsdon, 1997; Mintel International, 2002), including seeking advice from the Yorkshire Tourist Board to ensure a potential for cross-referencing of data gained. With respect to conducting surveys and interviews, previous experience gained through conducting surveys of visitors and a variety of businesses, including rural, visitor related enterprises, informed and assisted the research and the process of data collection. Data collection undertaken during previous studies, conducted both in person and via telephone with private enterprises, Government Agencies, and Non-Government Organisations (NGO), also provided experience of and insight into the interview and data collection process (Blanksby and Doncaster, 2000; Crowe *et al.*, 2002; Rotherham *et al.*, 2002a, 2002b, & 2005a).

3.4.9.2. Financial data reliability and the 'Black Economy'.

With respect to questionnaire design and questions concerned with business turnover, income generation and retention in rural regions, consideration should be given to the hidden, 'black economy'. Depending on the type of business, the potential for income to be received in cash presents opportunities for that income to go undeclared to the Inland Revenue. Due to its nature, determining the scale of the black, informal economy and the value of monies circulating within it is difficult. The tourism economy is no exception. As examples, Emran and Stiglitz (2005) and Schneider and Enste (2000) suggest the black, or shadow, economy is around 17.3% and between 13-23% of Gross Domestic Product (GDP) for OECD countries respectively, whilst the Monitor Group (2001) note that the informal economy of Johannesburg accounts for 16% of employment, with tourism businesses included within the informal economy. Within a UK context, HERO (2004) estimate that the black economy accounts for up to 13 percent of the UK GDP (HERO, 2004). Further to this, English Heritage (2004) detail survey results indicating that 54% of homeowners would access the black economy as a method to avoid paying VAT. Such observations have implications for businesses converting redundant buildings and assets for tourism and leisure use, whilst wider tax avoidance and use of black economies has implications for overall taxation levels (Schneider and Enste, 2000), thus potentially impinging on the viability of business.

However, regardless of its legality, the black economy can also have positive effects. With respect to tourism spend, UNEP (2002) note that monies accrued through black, informal tourism economies is maintained within local economies. As such, the multiplier effect attributed to this unofficial economic benefit is high, with money being repeatedly spent within the same economy and therefore community. In spite of this unaccountable benefit, however, consideration must be given to the potential for the hidden, black economy to skew survey results that are dependant on income and turnover data. The effects of the black economy on the tax base, communities and the employment market should not therefore be underestimated (Lyssiotou *et al.*, 1999).

As illustrated, issues surrounding the black economy and undeclared income therefore have implications from data obtained during the research, and conclusions drawn from that data. With the aim of black economies being to avoid tax liabilities and other costs, it is possible that data collected during the research under-estimates the true value of income and turnover as provided by recreation businesses, although such 'true' values are not verifiable.

3.4.10. Questionnaire Pilot Test.

The questionnaires were developed and modified through discussions with academic supervisors and colleagues, before being pilot tested at Potteric Carr, Doncaster. This was on a small sample of members of the public, and on personnel associated with visitor facilities. To further ensure the appropriateness of questions asked, questionnaires were also given to personnel associated with academic research, but independent of the research, and also to personnel with experience in the operation of business, both visitor and non-visitor related, and in the design and operation of visitor surveys. As in Shaw and Coles (2004), the results of pilot tests conducted were not be included in the final results. The difference between a pilot test conducted to determine the suitability of questionnaires, and a main study to obtain data to aid research, suggests the preclusion of data obtained from the former, as it may be subtly different from data obtained in the latter as a result of the development process of questionnaire design. The difference between the two data sets may potentially affect the research results.

The purpose of pilot testing the questionnaires was to determine whether questions asked of respondents were appropriate, did not cause offence, or were phrased in a manner that encouraged a 'no comment' type answer. Pilot or pre-testing is considered an important part of the research procedure by numerous authors, as it enables misunderstandings, misinterpretations, and ambiguities in questions to be identified (Moser and Kalton, 1971; Oppenheim, 1992; Chisnall, 2001). Through pilot testing, questionnaires can be developed and refined (Callan, 1997), making them more fit for purpose, and thus better able to obtain useful data. Pilot testing will also help ensure that results obtained are appropriate to the research. As Hunt *et al.* (1982, in Callan, 1997, p.337) note, pre-testing constitutes a "*dry run of the entire research process*", and thus a testing of a research instrument (Callan, 1997). Furthermore, pilot testing provided opportunities for respondents to comment on the layout of the questionnaires, and on questions that were either irrelevant or considered to be missing from the questionnaires.

With respect to the number of subjects undertaking a pilot test, there is no 'standard' number of subjects to be used (Yuksel, 2002). Time, cost and the availability of subjects all require consideration. Chisnall (2001) suggests 10 percent of the total survey number, as an arbitrary value, with Callan (1997) commenting that pilot samples can be small but should cover sub-groups within a population. Moser and Kalton, (1971, p.51), however, comment that whilst desirable, in practise it is "*rarely feasible*" for a pilot study sample to be as inclusive of subject sub-groups as the main sample.

The comments received through conducting the pilot tests were supportive, with no areas given as cause for concern. In conducting pilot tests and questionnaire review, it became apparent that some questions required rephrasing, with secondary questions added in some instances. The layout of the questionnaires was also modified in order to link questions together and offer a more coherent presentation.

An indication of the spend of visitors, their employment, income and life-style, offers an insight into the type of visitor most attracted to the Humberhead Levels and similar landscapes, and thus a segment of society to be targeted with respect to visitor marketing. To this end, the visitor questionnaire asked visitors for their home location, post code and combined household income. Should visitors decline to provide details of their household income, the use of the post code enabled their home town to be

identified. From this, if deemed necessary, a visitor profile could be determined through the use of the Yorkshire Tourist Board visitor profile database. The post code also enabled distances from home locations to the study region to be established accurately, and thus the distance visitors travel to be determined.

3.4.11. Identification of leisure and recreation businesses.

In order to conduct surveys of rural leisure and recreation businesses, such businesses required identification within the primary and comparative study regions. This was undertaken using easily accessible, publicly available visitor and tourism literature, and through recommendations. Using publicly available literature and recommendations mimicked how the general public find and visit attractions, and thus is a realistic and practical approach. Such literature included publicity leaflets and brochures, and the use of the internet, using search terms such as 'accommodation + Somerset', 'wildlife + Somerset', or 'attractions + Somerset', for example. Further attractions and visitor facilities were located during site visits to the study regions during the process of looking for known visitor facilities, and thus a 'drive-by' technique was adopted to supplement identified leisure and recreation businesses.

3.4.12. The approach to questionnaire distribution.

As the home locations of the sample visitor population was unknown, the method of questionnaire distribution adopted was to personally distribute the surveys to visitors at visitor attractions and to proprietors of leisure and recreation business in the manner of an on-site, user survey (Veal, 1997), with the intention of the completed surveys being returned in a pre-paid envelope. However, although being self-completion questionnaires requiring the respondents to post back completed questionnaires (Bryman, 2003), the surveys were not strictly a full postal survey, and the questionnaires were not delivered to the subjects 'cold'. Rather, the distribution and data collection adopted combined aspects of a delivery, on-site, user survey and an interview method (Veal, 1997; Robson, 2002; Saunders *et al.*, 2003). As noted, visitors and business proprietors were approached and engaged in conversation regarding the research, and asked to complete the questionnaire at their convenience. This method allowed a personal contact and rapport to be developed between the researcher and the

subject, similar to a personal interview. As well as enabling data to be gained on the spot through *ad-hoc* interviews (section 3.4.4.), it was hoped that this 'human face' to questionnaire distribution encouraged the completion and return of questionnaires, although this is impossible to determine.

3.4.12.1. Considerations of users and non-users.

It should be noted that in any survey based on an on-site or user survey method, those that get surveyed do so because they are the ones present. Whilst any bias introduced by this can be limited by surveys conducted at appropriate times or on multiple occasions, the viewpoint of those who never visit the site will never be known (Veal, 1997). Thus a bias by omission is inherent in such survey methods. Veal (1997) further notes that it would be impractical to survey all those who do not visit the target site, which, practically speaking, could be the majority of the UK population. However, Veal further observes that for a tourist destination, a survey and profile of users could help illustrate which of the non-users living in the catchment area of an attraction fit the profile of users. The non-user profile within the catchment can be determined by census data. By such a comparison, information on non-users can be determined, who can then be targeted in a marketing campaign either because they fit the profile of users, or through a marketing campaign that presents the attraction in a different manner appropriate to non-users of a different profile, thus potentially increasing the customer base. As Veal (1997, p.158) concludes "*user surveys can reveal something about non-users*".

3.4.12.2. Issues of survey timing.

Further issues to consider with conducting visitor and recreational business surveys include the potential for particular visitors to be predominant on particular days or times of year at a visitor attraction. Previous work by Rotherham *et al.* (2002a) with respect to development at Potteric Carr Nature Reserve, Doncaster, highlighted the potential to introduce bias into surveys by failing appreciate the different user patterns of visitors. Through interviewing stakeholders involved with the development of the nature reserve, it became apparent that the reserve received two distinct types of visitor on its then current opening days; Tuesdays and Sundays. Tuesday's visitors tended to be more serious bird watchers, and often retired or unemployed. Visitors to the reserve on

Sundays tended to include a greater range of sections of society, including families and people using the nature reserve as a place to walk. Thus proportionally, the numbers of serious bird watchers are less on Sundays than on Tuesdays, and vice versa. As a result, the day a visitor survey is conducted will have consequences for the data collected and results obtained. Similar observations regarding the exclusion of cases from sample populations are made by de Vaus (1991), Robson (2002), and Saunders *et al.*, (2003), with them being noted as a threat to research reliability. In order to ensure that the research has reliability in this respect, it is important that surveys are carried out at times and in a manner likely to capture a full cross-section of the sample population, as discussed in section 3.4.6., and supported by Figure 8. The practicalities of survey timing are discussed in sections 3.4.13. and 3.4.14., below.

3.4.13. Distribution of survey questionnaires.

Distribution of recreation business questionnaires was undertaken throughout the summer and autumn of 2004, as this period is generally the busiest for visitor attractions, and thus when such businesses are open. Whilst some of the identified businesses were closed or the owner unavailable, thus preventing the distribution of questionnaires, other businesses were located by the drive-by process, and thus sufficient numbers of business questionnaires were distributed. Table 9 details the number of questionnaires distributed in each region.

In comparison to the distribution of the recreation business questionnaires, distribution of visitor questionnaires, however, required more consideration. Due to the variation in visitor numbers caused by weekdays and weekends, school holidays and also the weather, it was important to allow for this in the questionnaire distribution to ensure any potential bias caused by such factors were reduced to a minimum. In order to allow for this, site visits to survey regions were planned to reduce such potential effects on visitor numbers, with questionnaires being distributed in holidays and non-holiday periods, on weekdays and weekends, to ensure 'exposure' to the variety of visitors such factors might influence. Factors such as the weather, or general visitor numbers, however, are uncontrollable. In instances of poor weather, or periods of few visitors, as was noted by several of the recreation businesses, visitor questionnaires were left to be distributed by the recreation businesses on behalf of the researcher. It should be noted, however, that

such a method resulted in a lower return of questionnaires, and was therefore used as a 'last resort'. The effects of this, and the questionnaire return rate in general, is discussed in section 3.5.1.

| Region | Visitor questionnaires distributed | Leisure & recreation business questionnaires distributed |
|---|------------------------------------|--|
| Humberhead Levels | 240 | 65 |
| The Fens | 405 | 70 |
| Somerset Levels & Moors | 110 | 75 |
| <i>Total questionnaire distribution</i> | <i>755</i> | <i>210</i> |

Table 9: Questionnaire distribution by region.

3.4.14. Practicalities of survey development and distribution.

3.4.14.1. Questionnaire distribution.

Following initial difficulties with recreation business questionnaire distribution in Somerset (section 3.4.14.2), for both sample sets the method of distribution adopted was the same: visitors and proprietors of leisure and recreation businesses were approached, and the purpose of the research explained. The survey questionnaires, complete with pre-paid return envelopes and a covering letter explaining the research (see Appendix Three), were left with the respondent for completion and return by post. A 'please return by' date was added to the questionnaires to encourage a response within a reasonable time. Although not of critical importance, 'return by' dates were selected to be around two to three weeks after the distribution period, thus encouraging prompt completion and coinciding with an easily remembered date, such as the first or last day of the month. Such an approach allowed the respondent to complete the questionnaire in their own time and at their own home, rather than feeling pressured into giving a response immediately. It was hoped that such a method encouraged more considered responses to questions, although this is impossible to verify. In concurrence with this aim, de Vaus (1991) notes that mail-type questionnaires often produce higher quality data than face to face surveys, allowing the respondent "*time and opportunity*" (de Vaus, 1991, p.111), although at the behest of motivation.

3.4.14.2. Recreational Business Questionnaires.

The Somerset Levels and Moors were selected as the initial site for distribution of recreational business questionnaires (RBQ). Although a pilot study had suggested that the questionnaires were fit for purpose, the initial Somerset Levels and Moors site visit highlighted the limitations of the questionnaires, and in many respects represented a large-scale pilot study. Originally planned to be completed on the spot, the open-ended nature of many of the questions encouraged respondents to talk at length about less than relevant topics. Thus considerable time was spent on a limited number of questionnaires, lessening the time available for overall questionnaire distribution. As a result, the decision was made to leave questionnaires with respondents, to be filled in and returned in the pre-paid envelope. As a result of this decision and post-Somerset questionnaire distribution, some questions required rephrasing, with other questions being modified to a tick-box answer to shorten and simplify the questionnaire, thereby encouraging completion. Questions that were routinely declined were removed from the questionnaire altogether.

On receiving completed questionnaires, it was apparent that some recreation businesses did not complete questions on their location, address or type of business, thus potentially limiting the questionnaire usefulness. However, in conjunction with a record of where questionnaires had been distributed and the recreation business type, the majority of such questionnaires were identified. To prevent such 'missing data' affecting the validity of questionnaires from later site visits, all following questionnaires were discreetly identified with numbers, thus ensuring their identification.

The questionnaires for all three study regions were originally the same, with a generic format. On the return of several of the completed questionnaires, it was apparent that some respondents were confused as to the study region, or had not read the covering letter. Thus later questionnaires were modified to identify them with the region they were distributed in, thus encouraging completion. In all instances, questionnaire modifications were undertaken in such a manner that later editions of the questionnaires were comparable with previous editions.

3.4.14.3. Visitor Questionnaires.

Visitor questionnaires were distributed either at visitor attractions by being handed directly to visitors, with the proprietors permission, or left with the proprietor for distribution. Whilst several visitor businesses did not allow the questionnaires to be distributed at the attraction, as visitors were there to enjoy themselves and not be disturbed, the majority of recreational businesses were helpful towards the research, not only in terms of distributing questionnaires, but also of offering insights into their customers and their views on visitor and tourism issues.

In a similar manner to the recreation business questionnaires (RBQ), the visitor questionnaire required some modification, again with modifications being done in a manner that enabled different versions of the questionnaire to be compared. Generally, the modifications were made as a result of responses to questions, i.e. answers to questions designed for numeric responses being given as written responses, thus a box for written responses was added to later questionnaires. Again where questions had been routinely left unanswered, these were removed from the questionnaire, with other questions altered to tick-box responses to shorten the questionnaire and encourage completion.

With respect to the study region, visitor questionnaires were also modified to enable them to be identified to the region or visitor attraction of their distribution, thus ensuring identification and assisting in analysis, and lessening the likelihood of incompleteness.

Difficulties occurred in distributing visitor questionnaires in some periods due to a lack of visitors. This lack of visitors was commented on several times by recreation and leisure businesses, although no reason was given. To attempt to limit the effect of this on the research, questionnaires were left to be distributed by the recreation business proprietors. In some instances, the proprietors themselves volunteered to distribute questionnaires. With experience showing that this 'third party' distribution method can reduce return rates considerably, records were kept of the sites and number of questionnaires left, thereby enabling differentiation from 'first hand' distribution of questionnaires to be determined.

3.4.15. Questionnaire completion.

As noted, both the business and visitor questionnaires required some modification after the initial Somerset data collection. As a result of this, a higher completion rate of individual questions within the questionnaires was apparent. The range of individual question completion for both questionnaires types was broad, ranging from a minimal completion to all questions being answered. There seemed to be no particular logic to why some questions, particularly those of a 'non-intrusive' nature, were not answered. However, as was to expected from previous studies concerned with income, business turnover and visitor age (Crowe *et al.*, 2002), some respondents declined to answer such questions, with a few considering such information sensitive and personal, to the extent of writing notes to this effect. The effects of non-completion and no response to questions are discussed further in section 3.5.2.

3.4.16. Targeting specific visitor attractions.

Initial distribution of visitor questionnaires was undertaken in a non-specific manner to enable a variety of responses to be obtained from a variety of visitor attractions. Such an approach was in part dictated by the co-operation of recreation business proprietors, in allowing or not their visitors to be approached, but also by the presence of visitors themselves. Questionnaires could only be distributed where visitors were present. However, in order to ascertain the responses of visitors to attractions with a wildlife and/or wetland consideration, such as bird reserves, and also with a landscape context, both historic and current, specific attractions were targeted, with questionnaires being distributed to their visitors. In light of this targeted method, such attractions and visitors approached could be considered to be an unrepresentative sample of the wider visitor population within the UK. However, with respect to the sampling techniques adopted by the research for questionnaire distribution (section 3.4.6.), representativeness to the wider UK visitor population is not a criterion of the research. However, it is believed that such visitors are representative of those visitors who visit attractions based around wildlife and with a landscape context, and thus data collected will appropriately inform the research. Furthermore, by targeting specific attractions, the importance of visitor attractions in introducing visitors to the case study regions could be investigated. Table

10 & Table 11 detail visitor attractions targeted for specific questionnaire distribution, and details of questionnaire distribution within the comparative study regions.

| | Region | | |
|-----------------------|---|--|---------------------------|
| | Humberhead Levels | The Fens | Somerset Levels & Moors |
| Targeted sites | Boston Park Farm RSPB Blacktoft Sands Waterways Museum Wetlands Waterfowl & Animal Reserve | Flag Fen RSPB Welches Dam Wicken Fen WWT Welney | <i>No targeted sites.</i> |

Table 10: Targeted visitor attractions.

Targeted attractions were selected either at the suggestion of the attraction or wildlife reserve manager during an initial, scoping visit. They were also chosen because they offered examples of visitor attractions that were considered appropriate for the Humberhead Levels with respect to nature-based visitor attractions, i.e. wildlife and wetland based attractions.

| Region and visitor attraction | Visitor questionnaires distributed |
|---|------------------------------------|
| Humberhead Levels; specific events & attractions targeted; | |
| Peatland Way opening (long distance walking path) | 21 |
| Boston Park Farm, Hatfield | 48 |
| RSPB Blacktoft Sands | 22 |
| Wetlands Waterfowl & Animal Reserve, Lound | 11 |
| Waterways Museum, Goole | 21 |
| Humberhead Levels general visitor questionnaire | 117 |
| <i>Humberhead Levels total visitor questionnaire distribution</i> | <i>240</i> |
| The Fens; specific events & attractions targeted; | |
| NT Wicken Fen | 51 |
| Flag Fen | 103 |
| *WWT Welney Centre (pre-swan feeding period) | 30 |
| *WWT Welney Centre (during swan feeding period) | 97 |
| RSPB Ouse Washes | 58 |
| The Fens general visitor questionnaire | 66 |
| <i>The Fens total visitor questionnaire distribution</i> | <i>405</i> |
| Somerset: (general visitor questionnaire distributed only) | 110 |
| <i>Total number of visitor questionnaires distributed</i> | <i>755</i> |

*WWT Welney undertakes swan feeding activities in the autumn. Thus separate surveys were undertaken to account for the differing types of visitors pre- and during swan feeding events.

Table 11: Details of visitor questionnaire distribution in the comparative study regions.

Aside from visitors and their willingness to complete the visitor survey, the distribution of questionnaires also depended on the permission of visitor attraction proprietors and managers, as noted. Whilst the majority of proprietors were happy for questionnaires to be distributed (section 3.4.14.3.), some expressed a desire that their visitors were allowed to enjoy their visit and not be overly disturbed. Thus although no specific timescale was adopted, the importance of maintaining cordial relationships with attraction proprietors and managers limited questionnaire distribution at any one attraction to the proprietors or managers consent. In this respect, questionnaire distribution potentially ceased at some attractions prior to all available visitors being approached, thus lessening potential data collection. However, with the majority of visitor attraction proprietors being amenable to questionnaire distribution, the effects on data collected through restricted questionnaire distribution at a minority of attractions is considered limited.

3.4.17. Variation in questionnaire distribution - 'KP' surveys.

The majority of the questionnaires were distributed as described in section 3.4.14.1. However, fifty-four visitor questionnaires (the 'KP' surveys, 23% of visitor questionnaires returned) were also completed 'on the spot' during surveys carried out in the course of similar work undertaken by associated researchers using the same questionnaires. These KP surveys took place at three sites within the Humberhead Levels, with the questionnaires being marked to enable their later identification. Thirty-two of these fifty-four questionnaires were completed by the visitors themselves, as intended through their self-completion design, and thus were completed in a similar manner as to the bulk of the questionnaires. The remaining twenty-two were completed by the researcher conducting the survey in response to visitor's answers and comments, in the fashion of an interview-based survey. Many of the quantitative-type data will be un-affected by this latter method, assuming a response. The qualitative data may, however, have lost some of its original intent. During analysis such data require careful interpretation.

3.4.18. Visitor Events.

As well as specific attractions, events designed to attract visitors were also targeted. Whilst this did provide an opportunity to distribute questionnaires to a larger, 'captive' audience, such events also gave the opportunity to see if visitors attracted to special events had visited the attraction and region before, and to gauge their opinions of the region visited. The opinions of first time visitors and the likelihood of repeat visits are an important aspect of the research. Furthermore, by distributing questionnaires before and during an event, an indication in the differing types of visitor could also be noted. Questionnaires so distributed were marked to enable their later identification during analysis.



Photograph 6: Looking towards Cheddar Gorge, The Somerset Levels and Moors.

3.5.0. Section Five: Data analysis.

In many respects, analysis is undertaken whilst data are being collected, as referred to within section 3.4.3. Information gained in one interview can influence questions asked in another interview. Seemingly idle conversations during site visits can lead to trains of thought that give a greater insight into issues hitherto unknown about but of relevance. Similarly, the responses to initial questionnaires can precipitate alterations to later questionnaires to elicit more useable data. The potential for alterations to adversely affect continuity in survey design was considered. Thus, as data collection was undertaken, a greater understanding of the research was generated, in turn leading to a modification of the research design. Therefore an iterative interplay exists between data collection and analysis (Babbie, 1998; Bryman, 2001). Although, as Babbie (1998) notes, by this interplay there is a danger that as a theoretical understanding is developed, the research could begin to only observe factors that support the research conclusions. Nonetheless, this relationship between data collection and analysis is an essential fixture of and central to research adopting a flexible design (Robson, 2002). Figure 7 illustrates the interplay between data collection and analysis as applicable to this research.

By adopting a flexible, mixed methods approach of data collection for this research, it was therefore necessary to take a similar approach to data analysis. Data collected through interviews and in conversations undertaken during site visits were transcribed as soon as practical. Numerical data collected through questionnaires was initially entered into an SPSS database, with written responses being coded and treated as numeric data. However, as several questions were open ended and contained several sentences of text, the responses from these questions were accounted for by coding in an SPSS database, with the actual responses being transcribed into tables for content and thematic analysis. This enabled recurrent words and phrases to be located and coded and common themes identified (Ezzy, 2002). Thematic analysis was further used to analyse interview transcripts. The use of content analysis enabled expected categories of data, e.g. wildlife-related responses, to be accounted for, whilst thematic analysis enabled more unexpected themes to be identified within the textual data (Ezzy, 2002). The frequency of occurrence of themes and common responses identified through the use of codes within text can be greatly assisted through the use of computer analysis. However, as Robson (2002) notes, whilst computer packages can analyse qualitative data, the ideas for the interpretation of results often occurs during data analysis, an

opportunity that could be missed through the complete reliance on technological aids. Thus a manual analytical approach was primarily undertaken for qualitative analysis. In order to maintain accuracy and allow checks on context, copies of data were made and worked on, allowing the original copy to remain in an unadulterated form, thus preserving the original context of responses.

The use of SPSS, and to some extent Excel, enabled comparisons with differing aspects of the data to be made, whilst also making it possible to investigate potential correlations with differing variables. Whilst SPSS also allowed the statistical reliability of results to be assessed, the limited numbers of survey responses collected in relation to some individual questions is likely to lessen any statistical reliability. Thus such an approach was only adopted when sample numbers were considered appropriate.

Secondary information obtained via reports into similar studies was used to inform the research. This triangulation of information from a variety of sources aided in assessing the validity of the research (Silverman, 1993; Creswell, 2003), as well as offering different avenues of interpretation.

With respect to data gained through the visitor surveys, where a group of visitors is approached, some groups took one questionnaire for the group, whereas others took one per person in the group. Thus, depending on how the questionnaire is completed, it is possible that visitor numbers are under or over estimated, and consequently, visitor spend could be over or under estimated, although this is not considered to be significant in terms of overall data collection. Similarly regarding the number of times an individual has visited a region or site before, responses range from a numeric value, e.g. 5, to '5+', or 'many'. Consequently, there is the potential for error in calculating values from such responses. Thus, to limit potential error, this and similar responses were categorised, as detailed in Table 12, with data being then analysed by category.

| Descriptive category | Numeric count | Typical descriptive response |
|-----------------------------|----------------------|-------------------------------------|
| First time | 0 | First time, never, not at all |
| Occasional | 1 - 5 | Occasional, two to three |
| Frequent | 6 - 10 | Numerous, several, often |
| Very frequent | 11 - 20 | Multiple, dozen, lots |
| Many | Over 20 | Many, countless, dozens |

Table 12: Visit categories.

3.5.1. Questionnaire return rate.

A difficulty in research using postal surveys as a means of obtaining data is that of ensuring a suitable return rate of questionnaires. The number of questionnaires distributed can be of little relevance when compared to the number returned. Too few returned questionnaires can limit the usefulness of data, and influence the reliability of the research (Denscombe, 1998; Bryman, 2001).

3.5.1.1. Encouraging questionnaire return.

Clearly, a well laid out, concise questionnaire is the first requirement in encouraging completion and return, as is a suitable covering letter explaining the purpose of the survey along with a prepaid, addressed envelope (Robson, 2002; Saunders *et al.*, 2003). This was the approach in this research. Generating an interest in the research topic will also encourage questionnaire completion (Veal, 1997), as may the promise of a potential prize or other incentive (de Vaus, 1991). Such "*incentivised*" questionnaires (Saunders *et al.*, 2003. p.283), can inadvertently introduce a bias, depending on the incentive offered. Appealing to people's social conscience and engendering a sense of importance and value to their opinions and answers is the ideal aimed for (de Vaus, 1991; Veal, 1997). This research adopted the latter approach.

3.5.1.2. Third-party questionnaire distribution.

As noted in section 3.4.13., in some instances, business proprietors offered to distribute visitor questionnaires. This was an offer undertaken when there were few visitors present. However, this method of questionnaire distribution seemed to produce a lower return rate of questionnaires than those distributed by the researcher personally. Aside from a lack of visitors (a factor noted by several recreation businesses), and although not verifiable, it is assumed that although the business proprietors were well intended, they neither had the incentive of the researcher, nor the knowledge of the research topic with which to inform the visitors, with consequences for the questionnaire return rate. In similar research (Rotherham *et al.*, 2004), in which questionnaires were to be distributed by visitor attraction staff, similar problems regarding questionnaire return rates were noted. Further to this, Oppermann (1996), in investigating farm tourism, noted that up to

30% of questionnaires left for distribution by farm tourism operators were not handed to visitors, thus affecting the overall questionnaire return rate.

3.5.1.3. Comparative and actual questionnaire return rates.

Estimates for postal survey return rates vary. De Vaus (1991. p.113) notes that response rates for postal surveys is "good". Saunders *et al.* (2003. p.284) suggest a postal response rate of 30% is "reasonable", although "variable", noting response rates for other postal-based surveys as between 10 and 50%. Veal (1997) illustrates the unrepresentativeness of some Government surveys with return rates of 3 or 4%. With the current research using a combined hand delivery-postal return survey approach (section 3.4.14.2.), nonetheless, the full postal survey examples detailed above offer comparisons to the return rates achieved during this research.

In light of the above examples, the overall return rate for *all* surveys distributed during this research is 31.7% for questionnaires returned by post, rising to 35.5% when including the fifty-four questionnaires completed during surveys undertaken by associated researchers (section 3.4.17.). Such figures compare with return rates noted by Jasper (2002) and Jones *et al.* (2003) at 28% and 22% respectively. Carter (1999) details farm survey return rates of 33%, whilst Oppermann (1996) obtained a farm survey return rate of 18.5%, and also referenced a second farm survey return rate of 15.8%. Survey return rates for this current research include visitor surveys being left with third parties for distribution, as noted above, and as such are not necessarily 'true' return rates. Not only were numerous questionnaires left with visitor attractions, thus increasing the number 'distributed', or more accurately left to be distributed, it is not known how many of these questionnaires were collected by visitors. Thus the actual return rate of distributed questionnaires is difficult to determine. By comparison, visitor questionnaires distributed direct to visitors received a greater return rate, up to 76.6%, the accuracy of which is known.

The actual and useable survey return rates of the visitor surveys and recreation business surveys are discussed further in sections 4.0.2. and 5.0.2. Return rates are detailed in Table 13, Table 14 and Table 15, below.

| Region | RBQ Left. | RBQ Returned | Rate |
|----------|-----------|--------------|-------|
| HHL's | 65 | 18 | 27.7% |
| The Fens | 70 | 22 | 31.4% |
| Somerset | 75 | 22 | 29.3% |

Table 13: Recreation Business Questionnaire return rate, by region.

| Regions & targeted attractions | VQ Left | VQ Returned | Rate |
|---|------------|-------------|--------------|
| Humberhead Levels | | | |
| Humberhead Levels general VQ | 117 | 7 | 6.0% |
| Peatland Way opening | 21 | 8 | 38.1% |
| Boston Park Farm | 48 | 9 | 18.8% |
| <i>Humberhead Levels total (excluding KP surveys)</i> | <i>186</i> | <i>24</i> | <i>12.9%</i> |
| Humberhead Levels 'KP' surveys | | | |
| RSPB Blacktoft Sands* | 22 | 22 | 100% |
| Wetlands Waterfowl & Animal Sanctuary* | 11 | 11 | 100% |
| Waterways Museum* | 21 | 21 | 100% |
| <i>Humberhead Levels total KP surveys</i> | <i>54</i> | <i>54</i> | <i>100%</i> |
| <i>Total Humberhead Levels</i> | <i>240</i> | <i>78</i> | <i>32.5%</i> |
| The Fens | | | |
| Fens general VQ | 66 | 18 | 27.3% |
| Wicken Fen | 51 | 23 | 45.1% |
| Flag Fen | 103 | 44 | 42.7% |
| WWT Welney Centre (pre-swans) | 30 | 23 | 76.7% |
| WWT Welney Centre (swans) | 97 | 53 | 54.6 |
| RSPB Ouse Washes | 58 | 30 | 51.7 |
| <i>The Fens total</i> | <i>405</i> | <i>191</i> | <i>47.2%</i> |
| Somerset Levels & Moors (general VQ only) VQ total | <i>110</i> | <i>12</i> | <i>10.9%</i> |

*'KP' surveys completed 'on-the-spot' by researchers.

Table 14: Visitor Questionnaire return rate by region & targeted attractions.

| | |
|--|--------------|
| Total Recreation Business Questionnaire Return Rate | 29.5% |
| Total Visitor Questionnaire Return Rate Excluding the return rate from the KP surveys | 32.4% |
| Total Survey Return Rate Excluding the return rate from the KP surveys | 31.7% |
| <i>Total Visitor Questionnaire Return Rate Including the return rate from the KP surveys</i> | <i>37.2%</i> |
| <i>Total Survey Return Rate Including the return rate from the KP surveys</i> | <i>35.5%</i> |

Table 15: Total questionnaire return rates.

3.5.2. Useable questionnaire return rates and percentage return rates.

3.5.2.1. Useable return rates

Whilst the overall return rate provides an indication of the 'success' of questionnaire distribution, it should not be taken without due consideration. As Bryman (2001) and

Saunders *et al.* (2003) note, a returned questionnaire does not always contain useable data. Not only do questionnaires not get returned, some can get returned blank or with few questions completed. Thus, the useable return rate of questionnaires is different from the total return rate. Whilst those returned blank can be considered 'non-returns', those with few questions answered potentially introduce a bias into findings, and thus require consideration in analysis.

Both Bryman (2001) and Saunders *et al.* (2003) offer formulas for calculating the useable return rate of questionnaires, and therefore maintaining representativeness. However, with the useable questionnaire return rates being similar to the actual return rates, Table 16 and Table 76, the use of such formulas is not considered necessary.

As noted, questionnaires can be non-returned for many reasons. However, an increasing reason suspected for not returning questionnaires is given as "*questionnaire fatigue*" (Saunders *et al.*, 2003. p.159). There is a growing, if debated, reluctance on behalf of the public to take part in social research surveys (Bryman, 2001). Such an effect will impact on survey return rates, and whilst little can be done to quickly counter any effects, potential questionnaire fatigue highlights the need to develop and present questionnaires quickly and accurately to the target sample in the first instance, as a second chance may not be available.

3.5.2.2. Percentage returns.

Percentage return rates, both actual and useable, give an indication of the success of a survey relying on postal returns. Such indications, however, can be misleading, particularly if the total numbers in individual categories are low. It is vital that along with percentage return rates, the actual numbers are known, enabling a more accurate presentation of data, and avoiding misleading conclusions (Denscombe, 1998).

3.5.3. Conclusion.

With the questionnaire return rate and the completion of individual questions noted, the data collection and analysis revealed a wide range of information pertinent to the research aims. The pragmatic and mixed methods approach adopted for the research and

data collection, enabled themes identified to be focussed on and explored accordingly. The return rate for visitor and recreation business questionnaires was 37.2% and 29.5% respectively, comparing favourably with similar studies (Oppermann, 1996; Carter, 1999; Jasper, 2002; Jones *et al.*, 2003). The useable questionnaire return rates are similar, with the data collected being grounded within the context of existing literature.

The selection of a case study approach and the resultant selection of the case study regions, enabled information on each case study region to be obtained and compared. Thus data from regions identified as having an existing visitor demand, (the Somerset Levels and particularly, the Fens), provided information transferable to the low visitor-demand Humberhead Levels. Through this process, data collected provided greater insight into issues associated with visitor demand within the case study regions. Through the targeting of specific organisations and visitor attractions, such data allowed a focussing on the research considerations of nature-based recreation and leisure, and the importance of landscape perception with respect to visitor demand.

The research methodology and data collected informed the research process within the context of existing literature. This enabled issues to be considered in an informed and critical manner. As such, the results of the data collected and subsequently analysed within the context of existing literature are presented within Chapters Four and Five, with supporting tables and graphs presented in the manner of Neutens and Rubinson (2001).

Chapter Four: Data analysis and interpretation - Visitor questionnaires.

4.0.1. Introduction.

The data collection processes were adopted as detailed in Chapter Three. Data collection itself was undertaken during the summer and autumn of 2004, and the data analysed with SPSS, Excel and thematic analysis (section 3.5.0.). Collated and expressed in graphs and tables, the results of the visitor data collected are presented and discussed within the following chapter. Supporting data are presented within Appendix One.

4.0.2. The useable return rate of the visitor surveys.

In common with the recreation business surveys, there is a difference between the actual and useable return rate for visitor questionnaires (Table 16). Lack of completed questions in some questionnaires rendered them unusable. Further to this, the response rate to individual questions within questionnaires varies. Consequently the sample value (N) also varies, and therefore must be noted when interpreting the results.

| Region | Questionnaires distributed | Questionnaires returned | Actual return rate | Useable questionnaires returned | Useable return rate |
|-------------------------|----------------------------|-------------------------|--------------------|---------------------------------|---------------------|
| Humberhead Levels* | 240 | 78 | 32.5% | 77 | 32% |
| The Fens | 405 | 191 | 47.2% | 190 | 46.9% |
| Somerset Levels & Moors | 110 | 12 | 10.9% | 11 | 10% |
| <i>Total</i> | <i>755</i> | <i>281</i> | <i>37.2%</i> | <i>278</i> | <i>36.8%</i> |

*Includes 54 'KP' surveys.

Table 16: Comparison between actual and usable return rates for visitor questionnaires.

Although reduced from the actual return rate, the difference between the actual and usable return rates, at 0.4% difference, is sufficiently low as to be of little importance.

The lower numbers of questionnaires distributed and returned from the Somerset Levels and the Humberhead Levels was due to a combination of lack of visitor numbers, noted within section 3.4.14.3., and a limited number of visitor attractions within the

Humberhead Levels (Rotherham *et al.*, 2002b). Data analysis indicates the Fens as the primary data collecting region in terms of visitor type and stay duration. The visitor types are similar to those identified within the Humberhead Levels. The limited visitor data from within the Somerset Levels (eleven useable responses), whilst not discounted, is nonetheless given less of a priority relative to data from the Fens, (190 useable responses). Furthermore, the Fens landscape is more comparable to the Humberhead Levels landscape than the Somerset landscape, as illustrated in Photographs 1 to 9 and Photograph 12. The lack of Somerset-related visitor data in this respect is not considered detrimental to the study with regard to overall visitor data.

Unless otherwise noted, the sample value refers to the number of survey questionnaire responses, rather than visitor numbers. Exceptions to this include mean accommodation and daily spend calculations.

4.0.2.1. Visitor survey return rate by visitor attraction categories.

Table 17 details the categorisation of visitor attractions from which visitors received and returned questionnaires. The number of respondents per category compared to region is also given. Whilst questionnaires were distributed at a variety of visitor attractions, the predominant responses received has been achieved from targeted, wildlife and wetland related attractions, using site-specific questionnaires. Thus data presented should be interpreted with this in mind. The distribution of regional, non-site specific, 'generic' questionnaires within the study regions has tended to produce a lower return rate overall.

An exception to the generally lower return rate for generic, study region wide questionnaires is the National Trust Wicken Fen site. Whilst producing a 45% return rate for site-specific questionnaires distributed, the distribution of generic, Fens questionnaires at Wicken Fen elicited a high return rate as well: of eighteen generic questionnaires returned by visitors from within the Fens region, including at Wicken Fen, ten of the eighteen were returned from visitors to Wicken Fen. Such a response rate from Wicken Fen is perhaps an indication of the value and enthusiasm placed on such attractions, and in this case flora and fauna, by visitors, to the extent that visitors consider it worthwhile to take part in surveys that they believe may benefit their interests, i.e. flora and fauna, in the longer term.

Whilst targeting specific attractions can be considered to be selective in terms of data collection, nonetheless, the research considerations of nature-based recreation and leisure encouraged a selection of attractions that met this description. However, with potential visitors to an area visiting for many reasons, and spreading economic impacts further afield, it was considered important to obtain data in a less specific manner. Thus regional, non-site specific questionnaires were used as appropriate. Furthermore, regardless of the nature of an attraction, the wider landscape is of critical importance in attracting visitors. Understanding visitors' appreciation of the landscape is important regardless of visitor interest in nature-based visitor attractions. Examples of site specific and regional, non-site specific questionnaires are given in Appendix Three.

Table 14 (Chapter Three) details the overall visitor questionnaire return rate.

| Attraction Category | Overall Count | Count per region | | |
|--|---------------|-------------------|------------|-------------------------|
| | | Humberhead Levels | Fens | Somerset Levels & Moors |
| Caravan & campsites | 6 | 3 | 2 | 1 |
| Farm related (excluding accommodation) | 10 | 10 | 0 | 0 |
| Fishing related | 1 | 1 | 0 | 0 |
| Museums, culture, historic | 70 | 21 | 48 | 1 |
| Other | 5 | 0 | 0 | 5 |
| Unknown | 5 | 1 | 0 | 4 |
| Walking event | 8 | 8 | 0 | 0 |
| Wetland & wildlife | 173 | 33 | 140 | 0 |
| <i>Total</i> | <i>278</i> | <i>77</i> | <i>190</i> | <i>11</i> |

NOTE: Some attractions offer several visitor experiences. Such attractions are categorised according to the predominant experience on offer.

Table 17: Categorisation of visitor attractions from which completed visitor questionnaires were received.

4.1.0. Section One: Results.

With the research considering the importance of nature-based recreation and leisure, the results presented below provide an analysis of visitor profiles and factors that influenced visits. Such factors include the importance of environmental attractants, such as wetlands, wildlife and farmland, and the appreciation, or not, of the wider landscape within the case study regions. Further to reasons given for visits are details of other attractions visited within the regions studied, and the propensity for repeat visits. With the potential for local economic benefits being central to the research, as well as aspects of visitor spend the results also detail the proportions of local and non-local visitors, and the proportions of day and overnight staying visitors, including distances travelled. Such data enabled an overview of visitor types to be established, and a general understanding of visitor appreciation for level, fen and wet landscape to be determined as potential landscapes for the establishment of visitor attractions based around wildlife and nature-based attractions. Figure 9 details an illustration of the data obtained with respect to undertaking visitor surveys (and recreation business surveys), which subsequently informed the research findings. With the results thus presented, further analysis is therefore undertaken, placing the results within the context of existing literature (sections 4.2.0 to 4.4.0), prior to a discussion of overall findings (Chapter Six).

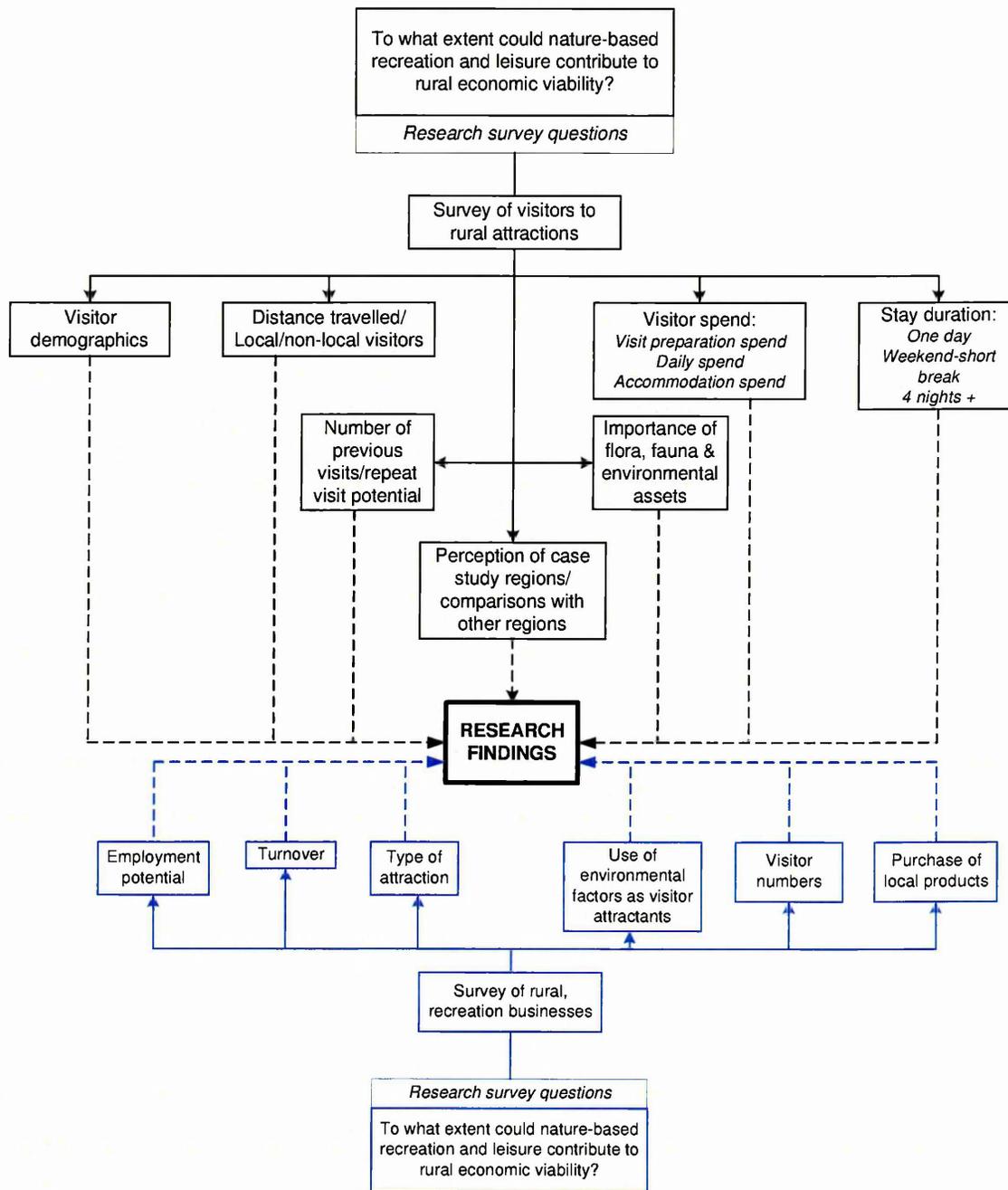
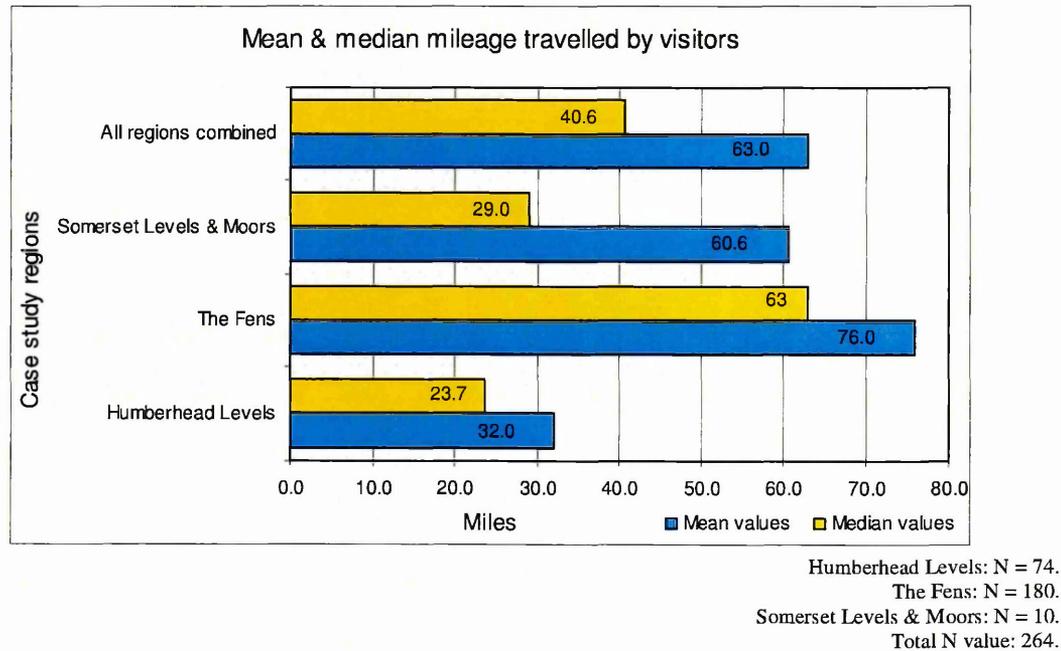


Figure 9: Illustration of data obtained through visitor and recreation business surveys.

4.1.1. Distances travelled by visitors to case study regions and attractions surveyed.

Graph 1 shows that visitors to the Fens travelled furthest, with a mean distance of seventy-six miles travelled. By comparison, visitors to the Humberhead Levels travelled less than half that distance, at a mean distance of thirty-two miles. Visitors to Somerset travelled a mean distance of sixty miles. It should be noted that the visitor sample from Somerset is small, with only ten samples. In combining all 'distance travelled' data from

the three case study regions, overall, the mean distance travelled by visitors was sixty-three miles to visit attractions within the case study regions. Distances given are *one way* distances. Mileage is calculated using visitors home postcodes and the RAC Route Planner, to determine distances between visitors homes and attractions at which questionnaires were distributed. Due to the various locations of questionnaire distribution within the case study regions, mileages are only approximates in respect of travelling to the case study regions, being related to attractions rather than the region itself, thus providing an indication of the distance travelled to a region.



Graph 1: One-way, mean & median distances travelled by visitors.

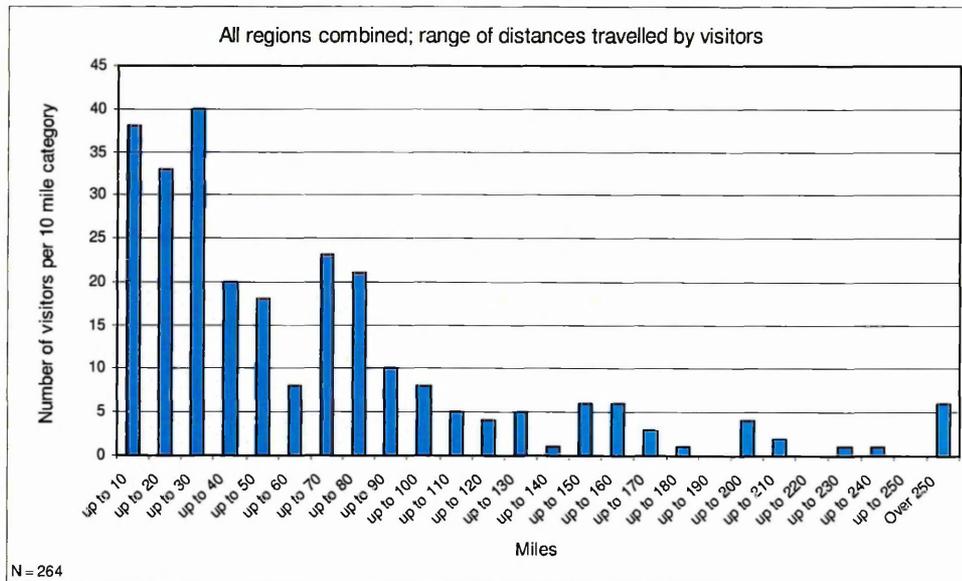
When comparing the median value for the study regions and distances travelled, it can be seen that distances travelled by the greater proportion of visitors is less than the mean value indicates, Table 18 and Graph 1. Those sample points that indicate a greater distance travelled, whilst important, skew the mean mileage data positively, i.e. higher. The use of median values accounts for and corrects this. The mileage travelled has implications for the spend and value of day and local visitors compared to the more traditional, tourism view of visitors, i.e. people who travel greater distances and stay overnight, and who are therefore considered tourists and are therefore more beneficial for income generation than day or local visitors. Such issues are discussed further in sections 4.3.0., and 4.4.0., and in the context of the literature review in sections 2.2.0. and 2.3.0.

| Region | Mean distance travelled | Median distance travelled |
|-----------------------------|-------------------------|---------------------------|
| Humberhead Levels | 32 | 23 |
| The Fens | 76 | 63 |
| Somerset Levels & Moors | 60 | 29 |
| <i>All regions combined</i> | <i>63</i> | <i>40</i> |

Humberhead Levels: N = 74.
The Fens: N = 180.
Somerset Levels & Moors: N = 10.
Total N value: 264.

Table 18: One-way, mean & median distances travelled by visitors.

Graph 2 illustrates distance travelled data from all three study regions combined. The data shown relates to the number of responses providing mileage data, with the mileage being grouped into ten-mile categories to simplify analysis. Graph 70, Graph 71 and Graph 72 detail the distances travelled by visitors to each study region, as obtained at visitor attractions within the regions. Whilst the data from Somerset, Graph 72, are limited in its usefulness owing to the low sample number, Graph 70 clearly shows that, for the Humberhead Levels, visitors generally travel up to fifty miles. Graph 71, however, demonstrates that for the Fens and its attractions, many visitors travel much further, with many travelling over one-hundred miles.



Graph 2: Combined study regions travel data - distances travelled by visitors (one way).

4.1.2. Number of previous visits made by visitors.

Visitors were asked the number of times, if any, that they had visited attractions before. Responses varied between numeric and descriptive responses, e.g. 'never', 'occasionally', and 'lots'. In order to collate numeric and descriptive data together, responses were categorised under descriptive headings, as detailed in Table 19.

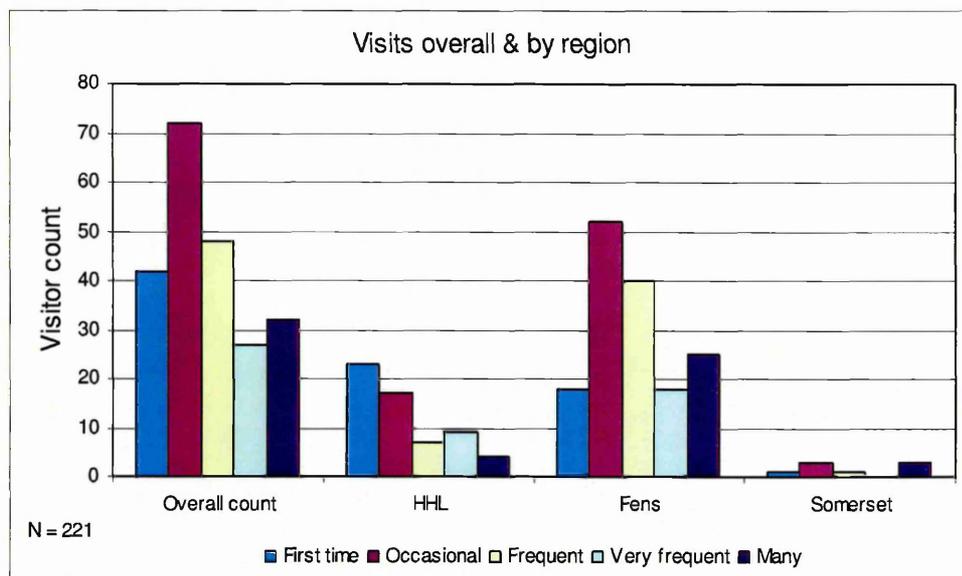
| Descriptive category | Numeric count | Typical descriptive response |
|-----------------------------|----------------------|-------------------------------------|
| First time | 0/1 | First time, never, not at all |
| Occasional | 2 - 5 | Occasional, two to three |
| Frequent | 6 - 10 | Numerous, several, often |
| Very frequent | 11 - 20 | Multiple, dozen, lots |
| Many | Over 20 | Many, countless, dozens |

Table 19: Repeat visit categories.

Using the descriptive categories, Table 20 and Graph 3 detail and illustrate the number of visits made by visitors overall and to the individual study regions. It can be seen from the table and graph that 'occasional' and 'frequent' visits comprise a high proportion of visitor numbers, at 54.3%, with a further 26.7% comprising of 'very frequent' and 'many' repeat visits. 'First time' visitors account for 19% of visitors. For the Fens in particular, the data show a broad spread of repeat visitor categories, and suggest a loyal visitor clientele. The visitor market is potentially similar to the Humberhead Levels.

| Descriptive category | Total Count | Regional count | | |
|-----------------------------|--------------------|--------------------------|-------------|------------------------------------|
| | | Humberhead Levels | Fens | Somerset Levels & Moors |
| First time | 42 | 23 | 18 | 1 |
| Occasional | 72 | 17 | 52 | 3 |
| Frequent | 48 | 7 | 40 | 1 |
| Very frequent | 27 | 9 | 18 | 0 |
| Many | 32 | 4 | 25 | 3 |
| <i>Total</i> | <i>221</i> | <i>60</i> | <i>153</i> | <i>8</i> |

Table 20: Number of visits overall and to study regions.



Graph 3: Illustration of visit frequency to study regions.

4.1.3. The proportion of local visitors identified.

As well as providing details of home postcodes, visitors were asked to indicate whether they lived locally. In this respect, 'local' was defined by the visitors themselves, with no indication of distance or other 'local' measurement detailed on the questionnaire.

Visitors were simply asked to tick a box if they lived locally. From this, the proportion of visitors who are local can be determined, as can the frequency with which locals visit attractions within their home area. With respect to the questionnaires, the original questionnaires did not ask visitors if they considered themselves local to an attraction or region. In response to comments such as 'I live here', or 'we're local' written on questionnaires, later editions of the visitor questionnaire asked visitors to indicate if they were local. Consequently, data regarding 'local' visitors is an indication of the *minimum* number and proportion of local visitors.

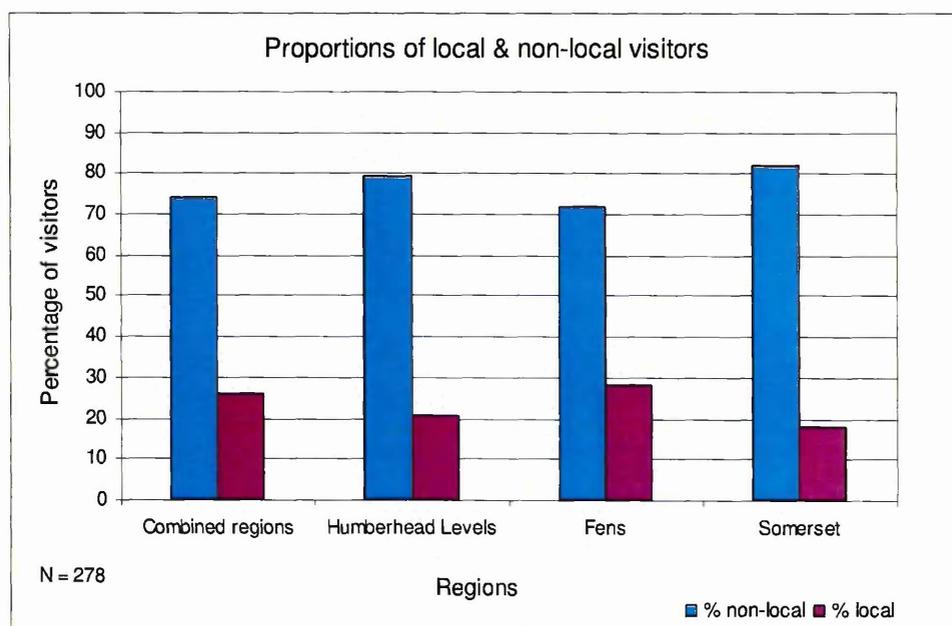
In considering the proportions of 'local' visitors, it should be noted that 'local' has no fixed definition with respect to distance travelled or immediate surroundings, as is apparent by the differences regarding distances travelled by visitors who consider and defined themselves as local or not, and detailed in questionnaire responses. 'Local' as a concept is discussed further in section 2.2.4., with the effects of this discussed in sections 4.3.6. and 4.3.8.

Table 21 details the minimum number of locals and non-local visitors per study region and overall, whilst Graph 4 illustrates the proportions of local and non-local visitors. It can be seen that, for all regions combined, local visitors make up a minimum of 25% of visitors numbers, suggesting an importance of local attractions to local people.

| Region | Non-local | Local | Total | Percentage | |
|-------------------------|-----------|-------|-------|------------|-------|
| | | | | Non-local | Local |
| Humberhead Levels | 61 | 16 | 77 | 79.2% | 20.8% |
| The Fens | 136 | 54 | 190 | 71.6% | 28.4% |
| Somerset | 9 | 2 | 11 | 81.8% | 18.2% |
| Total; combined regions | 206 | 72 | 278 | 74.9% | 25.9% |

Table based on minimum number of local visitors.
Based on visitors own definition of 'local'.

Table 21: Comparison of local and non-local visitor numbers.



Based on visitors own definition of 'local'.

Graph 4: Proportions of local and non-local visitor numbers.

4.1.3.1. Local visitors and the number of repeat visits.

Questionnaires asked of visitors if they had visited the study regions before, rather than specific attractions, or if they were local. Of the seventy-two visitors who indicated themselves as local, the majority made no other comment, other than an occasional 'I live locally', or 'live here' type comment. However, further to this, some local visitors also commented on the number of times they had visited the study region (s) previously, even though they lived within the study region. On the basis that they considered

themselves local, i.e. they lived within the region, it is assumed that such responses referred to the number of times they had visited the attraction at which the questionnaire was obtained. With this assumption in mind, the ensuing data, although limited, was tabulated in order to ascertain the number of times locals visit local attractions. The results are detailed in Table 22, and indicate that twenty-seven (37.5%) of all indicated local visitors have made previous visits to attractions they consider to be local. This equates to 9.7% of all visitors surveyed, with the proviso that local visitor data represents the *minimum* number of local visitors. This is due to original editions of visitor questionnaires not asking visitors if they considered themselves as local, as noted above.

| Descriptive category | Total Count | Regional count | | |
|-------------------------------------|-------------|-------------------|---------|-------------------------|
| | | Humberhead Levels | Fens | Somerset Levels & Moors |
| First time | 2 | 1 | 1 | 0 |
| Occasional | 7 | 1 | 6 | 0 |
| Frequent | 3 | 0 | 3 | 0 |
| Very frequent | 7 | 3 | 4 | 0 |
| Many | 10 | 1 | 9 | 0 |
| <i>Total</i> | 29 (27) | 6 (5) | 23 (22) | 0 |
| <i>Minimum local visitor number</i> | 72 | 16 | 54 | 2 |

Figures in brackets equal the number of previous visits made by local visitors ('Total' minus 'first time' visitors).

Table 22: Minimum number of visits made by local visitors to local attractions.

4.1.4. Repeat visits to targeted visitor attractions.

4.1.4.1. The Fens

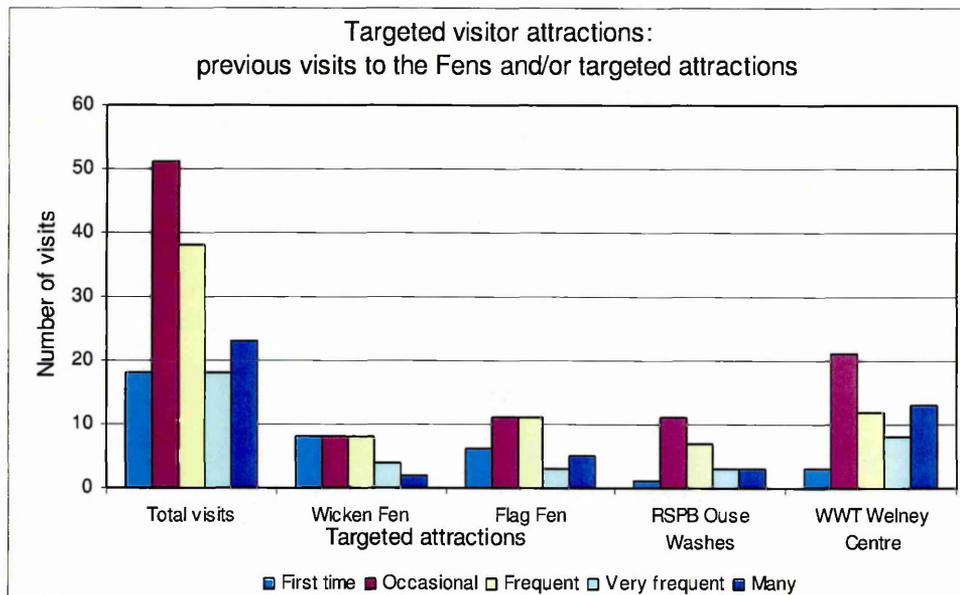
During the course of data collection, specific, wetland associated attractions were targeted within the Fens region: Wicken Fen, Flag Fen, RSPB Ouse Washes, and WWT Welney Centre. From this, an understanding of visitor profiles and opinions could be determined with respect to those who visit wetland attractions and thus undertake some aspects of nature-based recreation and leisure, as a central consideration of the research. Table 23 and Graph 5 detail the number and frequency of repeat visits made by visitors to the Fen region including the targeted attraction. It should be noted that due to the manner in which visitors responded to the questionnaire, in many instances it is unclear if the response refers to the study region or individual attraction. (The question specifically asked for the number of visits to the study region). However, in either case,

an indication of the number of visits to the region is ascertained, for which the individual attraction may be the primary draw.

As for repeat and previous visits to the study regions detailed in Graph 3 and Table 20, above, it can be seen that 'occasional' and 'frequent' visitors form a high proportion of visitors, with WWT Welney Centre also receiving a high proportion within the 'many' category.

| Descriptive category | Total Count | Targeted attraction count; previous visits | | | |
|----------------------|-------------|--|-----------|------------------|-------------------|
| | | Wicken Fen | Flag Fen | RSPB Ouse Washes | WWT Welney Centre |
| First time | 18 | 8 | 6 | 1 | 3 |
| Occasional | 51 | 8 | 11 | 11 | 21 |
| Frequent | 38 | 8 | 11 | 7 | 12 |
| Very frequent | 18 | 4 | 3 | 3 | 8 |
| Many | 23 | 2 | 5 | 3 | 13 |
| <i>Total</i> | <i>146</i> | <i>30</i> | <i>36</i> | <i>23</i> | <i>57</i> |
| N = | 184 | 33 | 44 | 32 | 75 |

Table 23: Targeted visitor attractions: previous visits to the Fens and/or attraction.



Wicken Fen: N = 33.
 Flag Fen: N = 36.
 RSPB Ouse Washes: N = 32.
 WWT Welney Centre: N = 57.
 Total: N = 184.

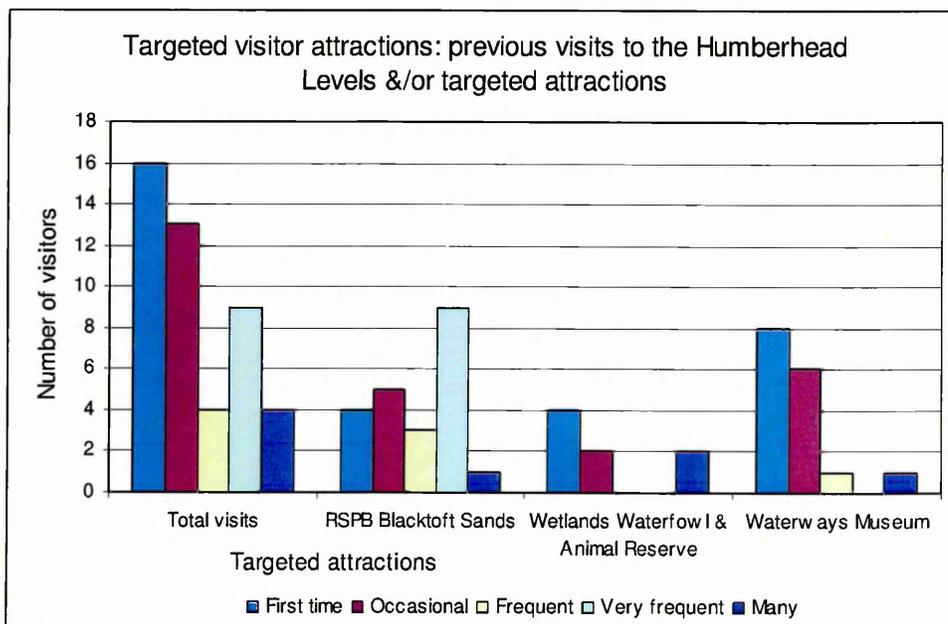
Graph 5: Targeted visitor attractions: previous visits to the Fens and/or attraction.

4.1.4.2. The Humberhead Levels.

Visitor questionnaires were also distributed at targeted attractions within the Humberhead Levels. Targeted attractions with a wetland, wildlife or water aspect include RSPB Blacktoft Sands, the Wetlands Waterfowl and Animal Reserve, and the Waterways Museum. Table 24 and Graph 6 detail the frequency and proportion of visits to the Humberhead Levels region. As noted above with respect to the Fens targeted attractions, it is unclear if respondent's answers relate to the specific attraction, or the study area. In either case, an indication of the number of visits to the Humberhead Levels region is determined.

| Descriptive category | Total Count | Targeted attraction count; previous visits | | |
|----------------------|-------------|--|-------------------------------------|------------------|
| | | RSPB Blacktoft Sands | Wetlands Waterfowl & Animal Reserve | Waterways Museum |
| First time | 16 | 4 | 4 | 8 |
| Occasional | 13 | 5 | 2 | 6 |
| Frequent | 4 | 3 | 0 | 1 |
| Very frequent | 9 | 9 | 0 | 0 |
| Many | 4 | 1 | 2 | 1 |
| <i>Total</i> | <i>46</i> | <i>22</i> | <i>8</i> | <i>16</i> |
| N = | 54 | 22 | 11 | 21 |

Table 24: Targeted visitor attractions: previous visits to the Humberhead Levels and/or attraction.



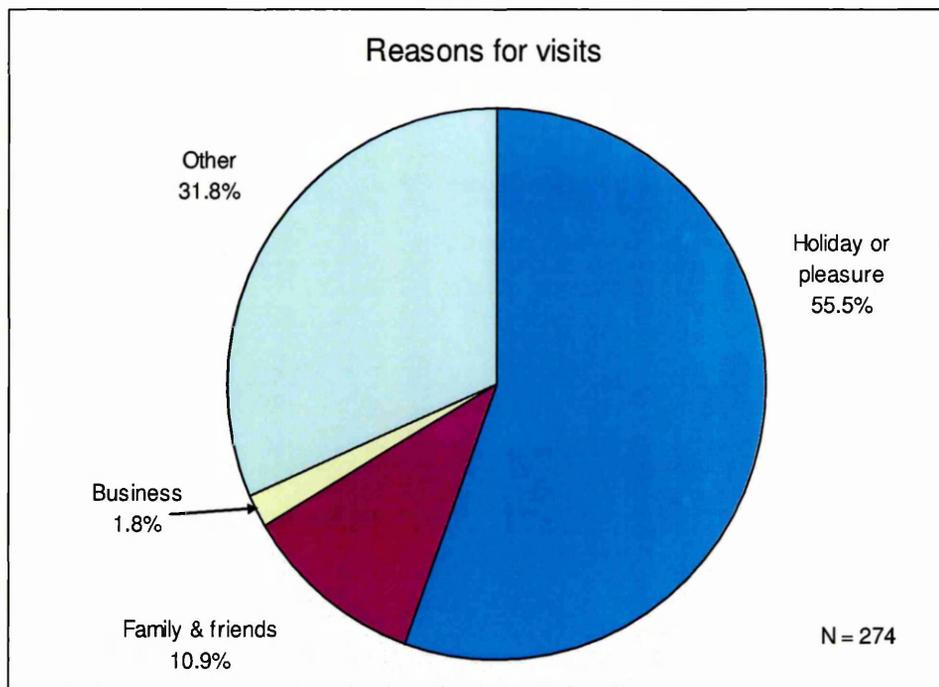
RSPB Blacktoft Sands: N = 22.
 Wetlands Waterfowl & Animal Reserve: N = 11.
 Waterways Museum: N = 21.
 Total: N = 54.

Graph 6: Targeted visitor attractions: previous visits to the Humberhead Levels and/or attraction.

As can be seen from Graph 6, as for the Fens region, 'occasional' visitors comprise the major, repeat visitor category. However, RSPB Blacktoft Sands has the greatest spread of visitor categories, and is the sole recipient of those within the 'very frequent' category.

4.1.5. Reasons for visiting the case study regions and surveyed attractions.

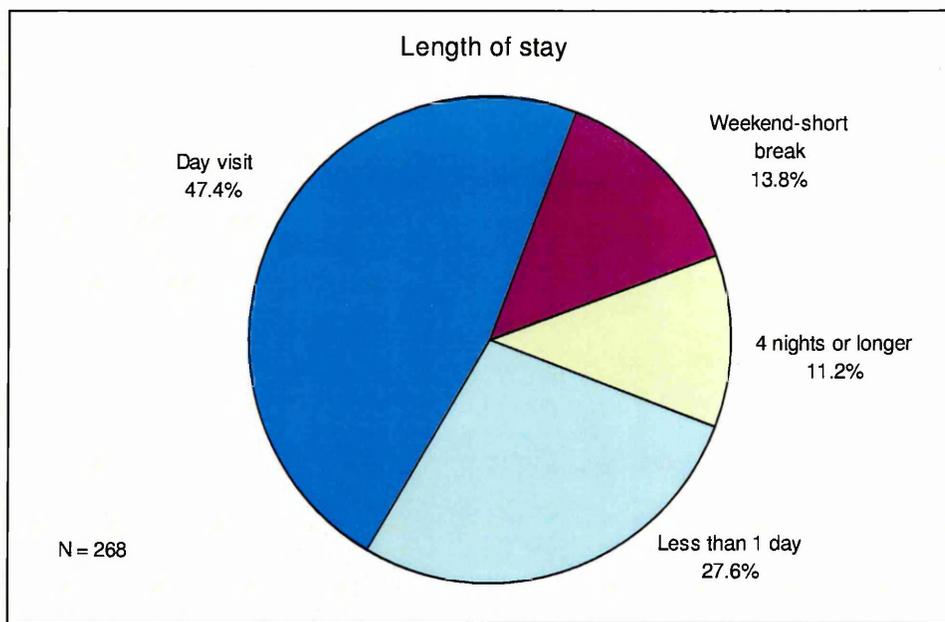
Questionnaires asked visitors for their reason to visit the study regions and attractions. As can be seen by Graph 7, holiday and pleasure visits comprised the majority of responses, at 55.5%, as would be expected. Second to 'holiday and pleasure', the 'other' category received 31.8% of the responses. However, within the 'other' category, many of the descriptive reasons given can also be ascribed to 'holiday and pleasure' activities. Such reasons include bird watching, fishing, day out with grandchildren, participation in workshops, and so forth. By far the majority of 'other' responses are those that comprise bird watching or related activities. Of the 118 visitors who provided a descriptive response to their reason for a visit, with some visitors indicating both the 'holiday and pleasure' category and providing a descriptive, 'other' response, 44.1%, fifty-two responses, indicated bird watching or related activities as their reason for visiting. However, considering the number of questionnaires distributed at and received from wetland, wildlife and bird reserves compared to other attractions, this is to be expected.



Graph 7: Proportions of reasons given for visiting by visitors.

4.1.6. Length of visitor stay.

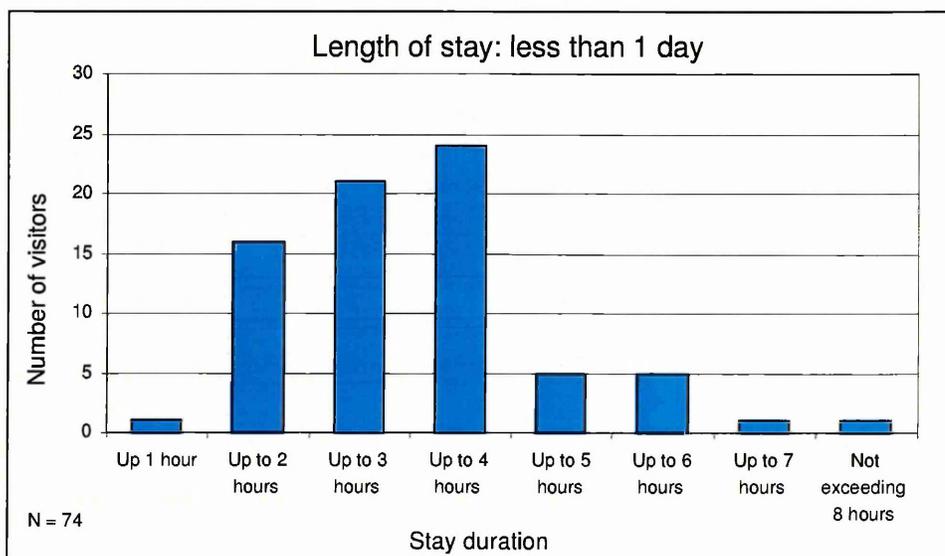
Determining the length of visitor stay was considered an important aspect of the research. As can be seen from Graph 8, day-visitors, at 47.4%, are the predominant visitor, with those staying less than one day comprising the following predominant category at 27.6%. Those staying overnight are in the minority at sixty-seven responses, equating to 25% of visitor numbers indicating a length of stay.



Graph 8: Visitor length of stay.

With respect to visitors staying less than one day, the mean stay duration is 3.5 hours, whilst the median and mode are three hours and four hours respectively. Graph 9 illustrates the stay duration of visitors staying less than one day.

Through combining 'day' and 'less than one day' visitor data, the data shows that visitors staying up to one day form the majority of visitors, at 75% of visitor numbers. In conjunction with distances travelled, this suggests that visitors are prepared to travel considerable distances in one day to visit attractions within the study regions.

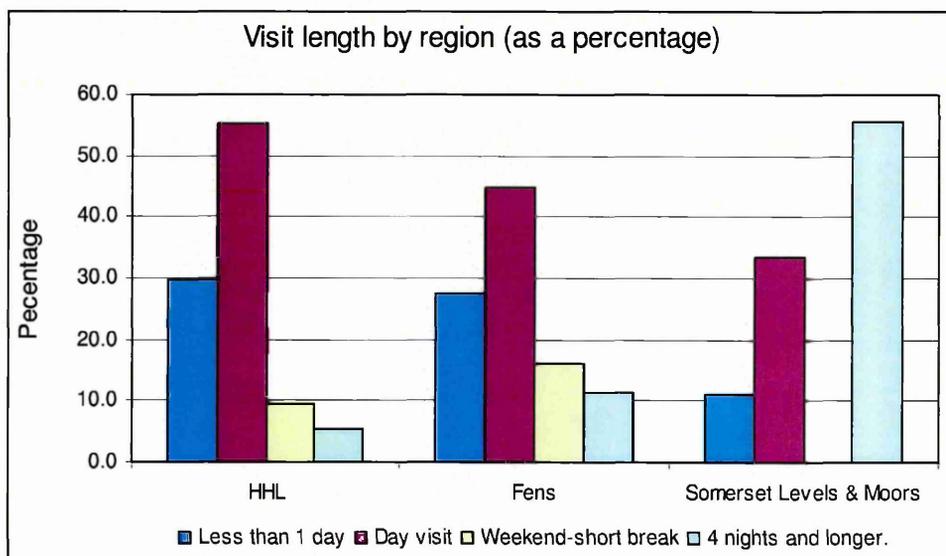


Note: those staying 8 hours or more within the same day are considered to be day-visitors.

Graph 9: Length of stay: visits of less than one day.

4.1.6.1. Length of visitor stay by study region.

Graph 10 details length of stay by study region, as percentages. As can be seen, trips lasting up to one day comprise the majority of visits, excepting within the Somerset Levels and Moors, where stays of four nights or longer predominate. Compared to the Humberhead Levels and the Fens, Somerset has a longer history of visitor and tourism-related activity, and thus is likely to have proportionally greater numbers of visitor and tourism-related facilities. Furthermore, the Somerset Levels and Moors region is smaller than either the Humberhead Levels or the Fen regions, with popular visitor destinations on its boundaries. There is potential for an overlap of visitor demand in conjunction with surrounding, well established visitor destinations, including demand for accommodation. It is noted that the sample for the Somerset Levels and Moors is small (nine samples). Thus the data presented for that region should be treated with caution.



Humberhead Levels: N = 74.

The Fens: N = 185.

Somerset Levels & Moors: N = 9.

Graph 10: Length of stay by study region.

4.1.7. Accommodation type used by overnight staying visitors.

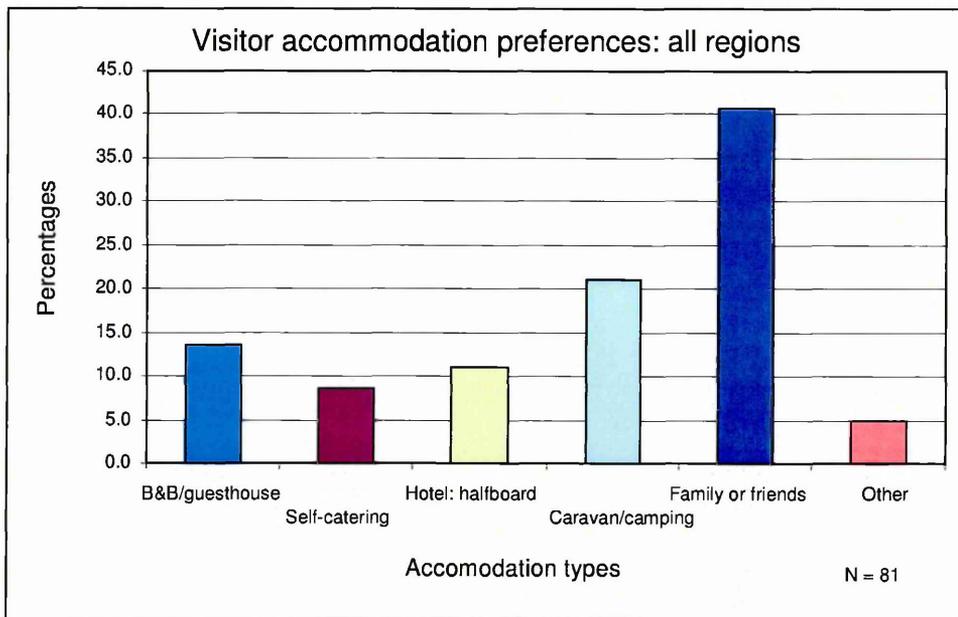
With the predominance of visits being up to one day in length, data available from questionnaires on visitor accommodation choice are limited. With this proviso, Graph 11 shows that, after staying with family or friends, caravan and camping comprise the most popular individual accommodation category for all regions combined. However, when compared on a regional basis, and whilst caravan or camping is prevalent within the Humberhead Levels and the Somerset Levels and Moors, within the Fens, B&B/guesthouses and half-board hotels predominate, although these are secondary compared to staying with family or friends, Graph 12.

Table 25 details the accommodation categories provided on the visitor questionnaire. It should be noted that no visitors indicated staying in a full-board hotel. For the purposes of data analysis, it was assumed that if respondents did not indicate an accommodation preference detailed on the questionnaire, then they were deemed to be staying in their own homes. This comprised a total of 193 within the 'own home' category, of a sample of 274. 'Own home' data is not included on Graph 11 and Graph 12, which therefore have a lower sample number of eighty-one (Total sample minus 'own home' category). The limited number of samples within the Humberhead Levels and Somerset Levels and Moors should be noted.

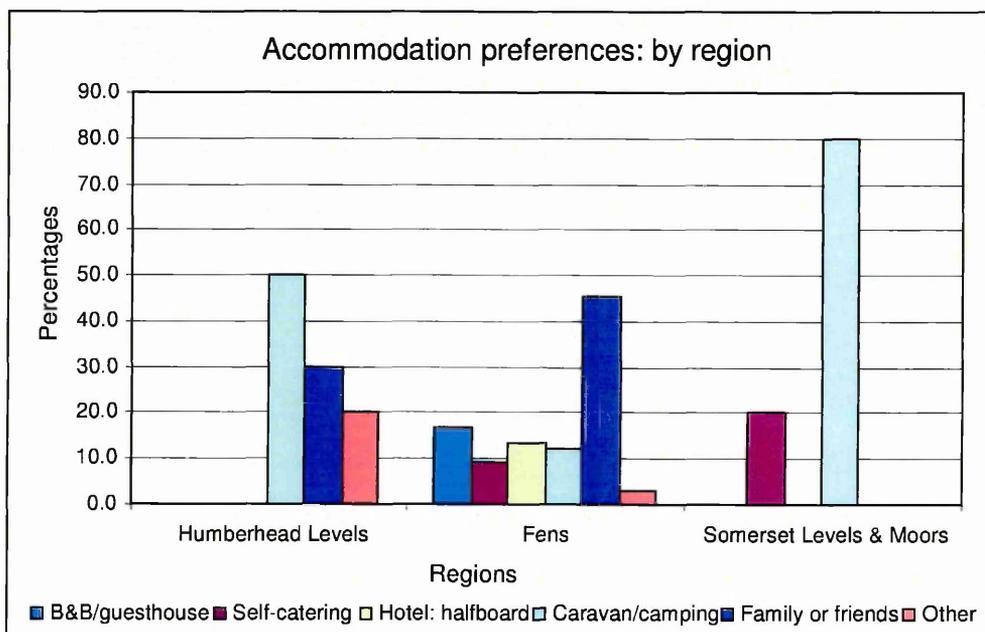
Of those staying over night, a total of seven (10.4%) from sixty-seven responses, indicated that their accommodation was situated on a working farm: two within the Humberhead Levels, four within the Fens, and one in the Somerset Levels and Moors.

| |
|-------------------------|
| B&B or guesthouse |
| Self-catering |
| Hotel; half-board (B&B) |
| Hotel; full-board |
| Caravan or camping |
| Family or friends |
| Other - please specify |

Table 25: Accommodation categories detailed on visitor questionnaires.



Graph 11: Accommodation preferences: all study regions.



Humberhead Levels: N = 10.
 The Fens: N = 66.
 Somerset Levels & Moors: N = 5.
 Total: N = 81.

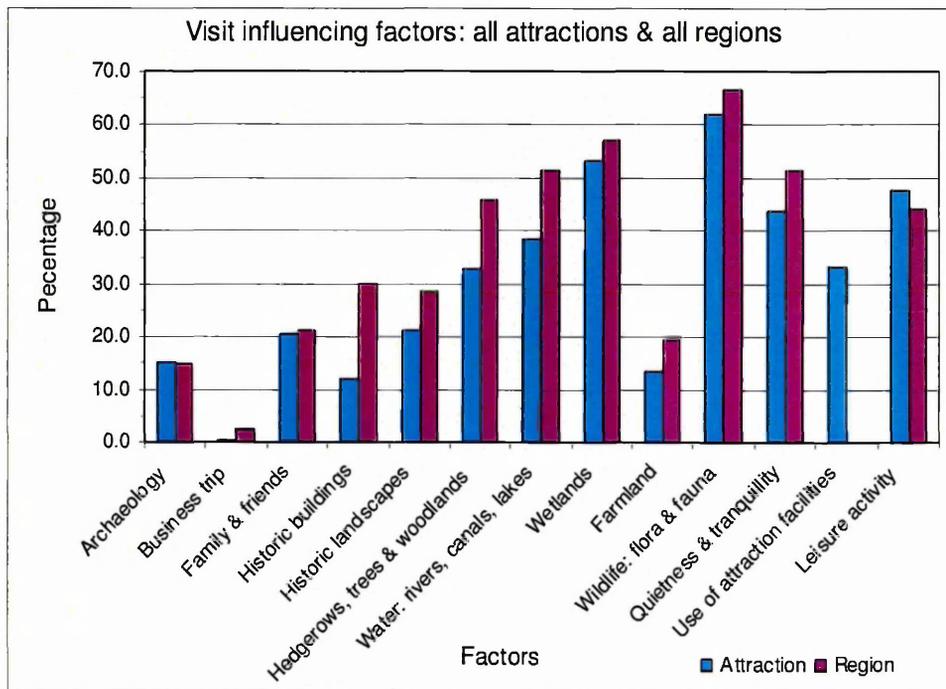
Graph 12: Accommodation preferences by study region.

4.1.8. Factors influencing visitors decisions to visit case study regions and attractions surveyed.

Questionnaires asked visitors what factors influenced their decision to visit the region and attraction where the questionnaire was obtained. The choice of factors is presented

in Table 103. Whilst the choices available remained constant for all surveys, the questionnaires were made specific for each study region and the specific attraction in which they were distributed, thus enabling potential differences and similarities between each study region and attraction to be observed if necessary.

Graph 13 illustrates the preferences for all attractions and all study regions combined, as percentages. The graph illustrates that flora and fauna, and wetlands are the predominant factors in attracting visitors overall. Other important factors include quietness and tranquillity, leisure activities, and water-related factors. Farmland, comprising as it does the majority landscape use of the study regions, receives a low rating, with only archaeology and business trips being proportionally less of an influence.



Attraction factors: N = 276.
Regional Factors: N = 218.

Graph 13: Visit influencing factors for all attractions and all regions combined.

NOTE: for all regional graph and table data, 'Use of attraction facilities' category is not included. This category is used in 'attraction' data only.

Graph 14, Graph 15 and Graph 16 illustrate visitor preferences for visit influencing factors for the three individual study regions. Table 26 details the actual percentage figures. From these graphs, it can be seen that the distribution of preferences for visit influencing factors within the Humberhead Levels and Fens are similar to each other and to that of the combined regional data illustrated in Graph 13. An exception to this is

wetlands within the Humberhead Levels, which shows a much decreased preference, a possible result of the lack of easily accessible wetland attractions within the Humberhead Levels, and the resultant distribution of questionnaires.

The preference distribution for the Somerset Levels and Moors shows a marked difference. Again this may be due to questionnaire distribution at available attractions and compounded by the lack of samples. However, factors such as flora and fauna, wetlands, and quietness and tranquillity receive similar ratings to the overall preferences. An exception to the overall, combined regional ratings and ratings within the Humberhead Levels and the Fens, is the regional preference for farmland within the Somerset Levels, at around twice the rating for the Fens, and over six times the rating for the Humberhead Levels, at 44.4%, 22.2% and 7.1% respectively. These results suggest that aspects of the Somerset, farmed landscape are more appealing to visitors than the open landscapes of the Humberhead Levels and the Fens.

| Visit influencing factor | Humberhead Levels | | Fens | | Somerset Levels & Moors | |
|------------------------------|-------------------|--------|------------|--------|-------------------------|--------|
| | Attraction | Region | Attraction | Region | Attraction | Region |
| Archaeology | 2.6 | 0 | 20.6 | 19.6 | 9.1 | 22.2 |
| Business trip | 1.3 | 3.6 | 0.0 | 2.0 | 0.0 | 0.0 |
| Family & friends | 17.1 | 7.1 | 22.2 | 27.5 | 9.1 | 0.0 |
| Historic buildings | 6.6 | 13 | 13.2 | 36.6 | 27.3 | 22.2 |
| Historic landscapes | 13.2 | 16 | 24.3 | 34.0 | 18.2 | 11.1 |
| Hedgerows, trees & woodlands | 27.6 | 36 | 32.8 | 47.1 | 63.6 | 88.9 |
| Water: rivers, canals, lakes | 40.8 | 48 | 37.0 | 51.0 | 45.5 | 77.8 |
| Wetlands | 23.7 | 30 | 65.1 | 66.7 | 54.5 | 55.6 |
| Farmland | 9.2 | 7.1 | 14.8 | 22.2 | 18.2 | 44.4 |
| Wildlife: flora & fauna | 52.6 | 59 | 66.1 | 69.9 | 54.5 | 55.6 |
| Quietness & tranquillity | 28.9 | 30 | 48.7 | 58.2 | 54.5 | 66.7 |
| Use of attraction facilities | 17.1 | 0 | 37.0 | 0.0 | 72.7 | 0.0 |
| Leisure activity | 39.5 | 32 | 48.7 | 49.7 | 72.7 | 22.2 |

Humberhead Levels attractions: N= 76.

Humberhead Levels region: N= 56.

Fens attractions: N = 189.

Fens region: N = 153.

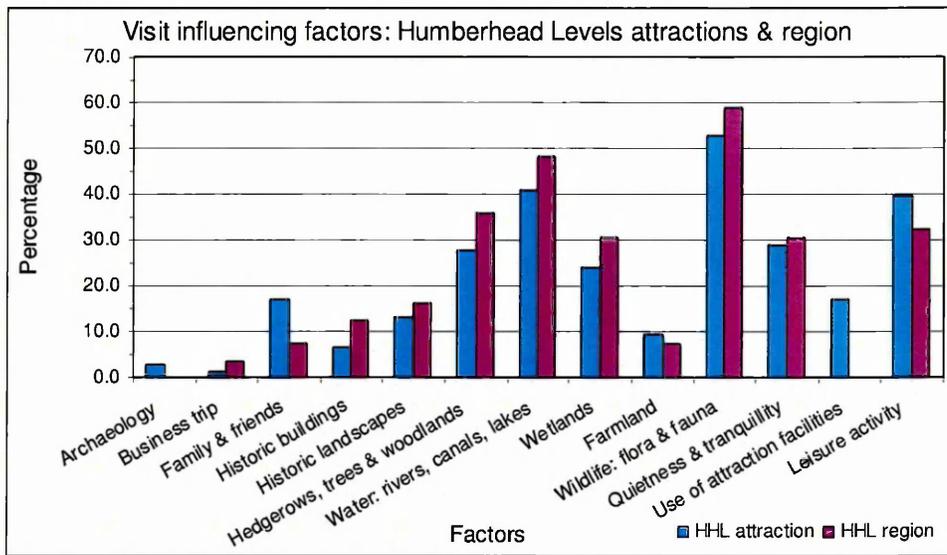
Somerset Levels & Moors attractions: N = 11.

Somerset Levels & Moors region: N = 9.

Total attraction: N = 276.

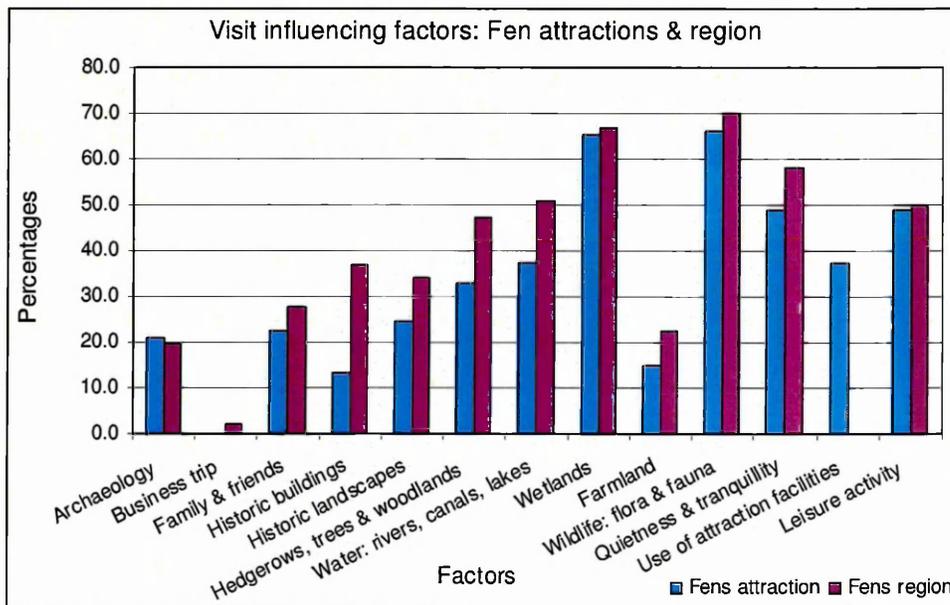
Total region: N = 218.

Table 26: Regional visitor influencing factor ratings (percentages).



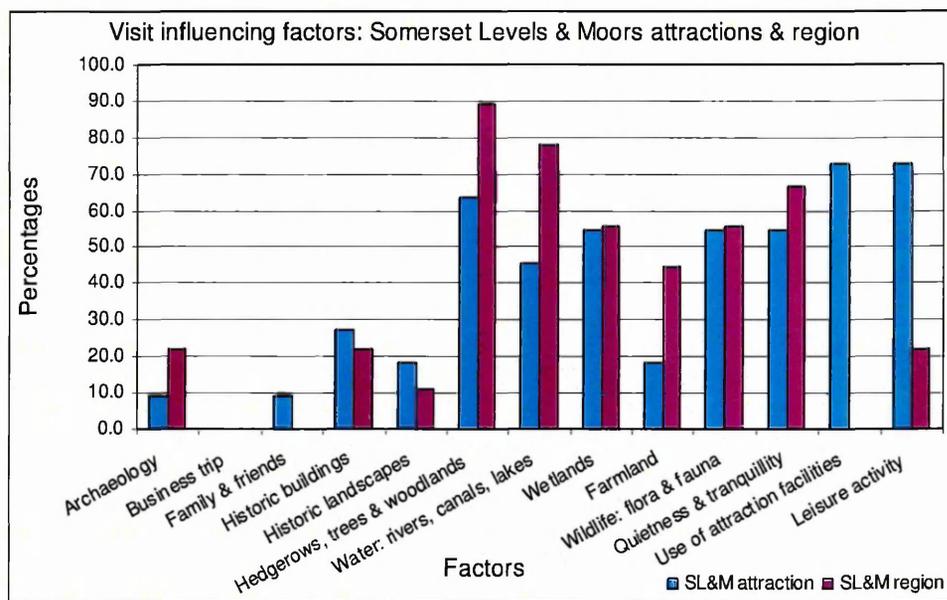
Humberhead Levels attractions: N= 76.
Humberhead Levels region: N= 56.

Graph 14: Humberhead Levels visitor influencing factors.



Fens attractions: N = 189.
Fens region: N = 153.

Graph 15: Fenland visitor influencing factors.



Somerset Levels & Moors attractions: N = 11.
Somerset Levels & Moors region: N = 9.

Graph 16: Somerset Levels & Moors visitor influencing factors.

4.1.8.1. Fen visit influencing factors: targeted attractions.

Graph 73, Graph 74, Graph 75, Graph 76 and Table 104 detail the influencing factors for targeted attractions within the Fens region. It can be seen from graphs for Wicken Fen, RSPB Ouse Washes, and WWT Welney Centre (Graph 73, Graph 75 and Graph 76) that there is some variation in the ratings of factors, but that generally the distribution of ratings is similar to that of the overall ratings and regional ratings for the Fens and Humberhead Levels. Some of the variations will be due to the specific attraction type, i.e. archaeology will rate high at an archaeological attraction such as Flag Fen, with wildlife rating higher at wildlife associated attractions. Differences may also occur due to the type of visitor at each attraction i.e. predominantly bird watchers at specialist bird reserves, compared to more general members of the public at less specific attractions. With respect to Flag Fen, it can be seen from Graph 74 that the distribution of ratings is considerably 'flatter' than for other Fenland attractions, as well as distributions illustrated within the regional graphs (Graph 14, Graph 15 and Graph 16). Within all the targeted attraction graphs it can be seen that farmland receives a low rating. This is in keeping with regional Fen and Humberhead Levels data, but contrary to Somerset Levels and Moors data.

4.1.8.2. Humberhead Levels visit influencing factors: targeted attractions.

Graph 77, Graph 78, Graph 79 and Table 105 detail the visitor influencing factors at targeted attractions within the Humberhead Levels region. As with targeted attractions within the Fens, aspects of an attraction will influence ratings for individual factors. Thus, for RSPB Blacktoft Sands, wildlife rates highly above other factors, as expected of a bird reserve, with few visitor facilities either at the reserve or within the surrounding area. That wildlife is the almost exclusive factor in attracting visitors to RSPB Blacktoft Sands and the Humberhead Levels suggests that visitors to this attraction are visiting for a particular purpose, in this case, bird watching. A similar consideration could be expected of the Waterways Museum respective to the high rating of water-related factors, although in this case there is a greater response for other factors overall, seen by their relatively level rating, suggesting a less specialised visitor clientele.

4.1.8.3. Overall ratings of visit influencing factors.

Overall, higher factor ratings tend to be clustered around what could be termed 'natural and landscape factors', i.e. hedgerows, trees, water-related factors, wildlife, quietness and tranquillity, as could be expected of rural visitor attractions. Excepting Somerset, ratings for farmland are predominantly low. Attraction-specific factors produce high ratings, but other, less specific factors such as quietness and tranquillity receive ratings above 25% in all graphs except RSPB Blacktoft Sands. The lower ratings for archaeology (excepting Flag Fen), business trips, and family and friends, suggest that these are considerations in attracting visitors to the study regions, but it is the natural and landscape factors that predominate as influencing factors.

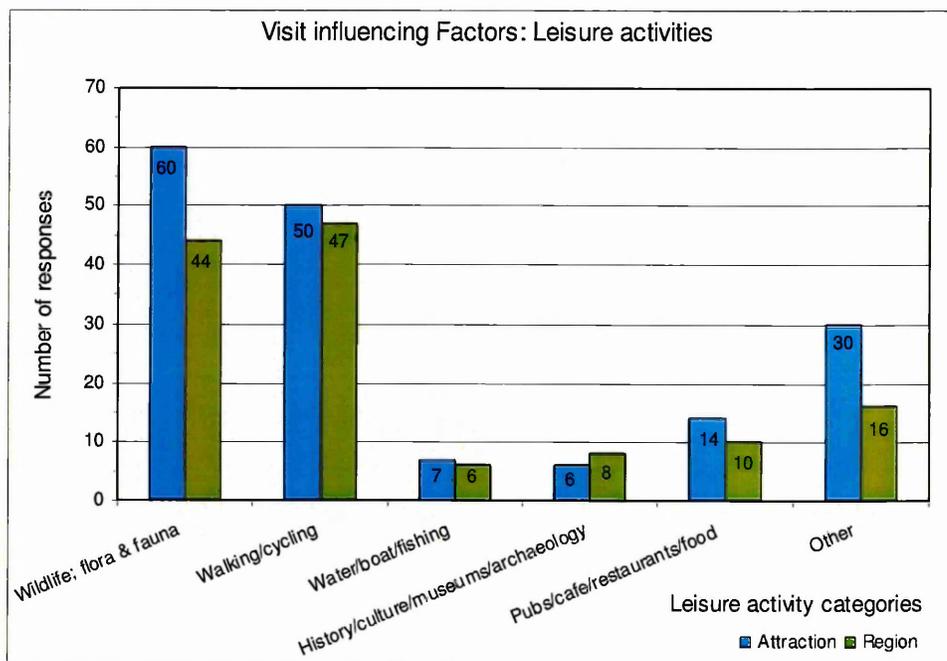
Whilst data concerning the importance of visitor influencing factors for individual visitor attractions are of note, they in many ways reflect the particular attraction to which the data relates. However, with regard to a wider overview of the study regions, the data pertaining to regional influencing factors provide more of an indication of the preferences of visitors. In many cases, the regional preferences rate higher than the preferences ascribed to individual attractions. In this respect, this regional preference data is of importance for potential policy decisions with respect to land management within, and the marketing of, the study regions.

4.1.8.4. Leisure activities as factors in influencing decisions to visit.

Questionnaire respondents provided descriptive data with respect to leisure activities undertaken at specific attractions and within the study regions. These responses were categorised and are detailed in Table 27 and Graph 17. It should be noted, however, that many respondents included several activities within the 'leisure activity' category. The categories detailed in Table 27 and Graph 17 include all activities given, and thus does not equate to one activity per respondent, but is rather an indication of all activities undertaken by respondents.

| Category | Response Count | |
|-------------------------------------|----------------|--------|
| | Attraction | Region |
| Wildlife: flora & fauna | 60 | 44 |
| Walking/cycling | 50 | 47 |
| Water/boats/fishing | 7 | 6 |
| History/culture/museums/archaeology | 6 | 8 |
| Pubs/café/restaurant/food | 14 | 10 |
| Other | 30 | 16 |

Table 27: Categorised leisure activities undertaken by visitors, from descriptive responses.



Total number of attraction-related leisure activities given: N = 167.
 Total number of regional-related leisure activities given: N = 131.

Graph 17: Leisure activity categories as visit influencing factors.

As can be seen from the data, after wildlife-related activities, walking and cycling (predominantly walking) form the second most popular activity by a considerable margin. Level landscapes found within the study regions are suited to such activities,

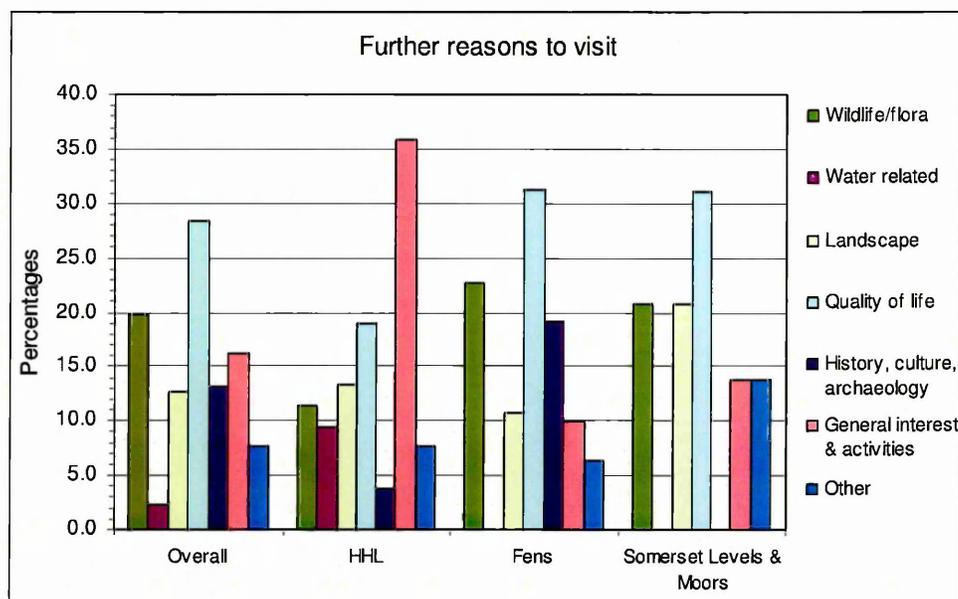
although the data collected does not indicate why walking and cycling receives such a high rating. The comparatively high rating of the attraction-related, 'other' category is possibly a reflection of the data collection period. Whilst there are a variety of activities included within this category of non-specific form, approximately 23% (seven responses) of attraction-related activities relate to the participation in flint-knapping and herb workshops at Flag Fen, these being undertaken during the data collection period. A further 16.6% (five responses) of attraction-related activities are attributed to a maize maze situated on a farm within the Humberhead Levels.

4.1.9. Descriptive responses provided as reasons for undertaking visits.

As well as visitor influencing factors, visitors were also asked for other, descriptive reasons for visiting, both to study regions and to targeted attractions. Responses were categorised with respect to content, with categories being tabulated and graphed to indicate their relative importance, Table 28 & Graph 18. Due to some respondents providing several reasons for visiting attractions and study regions, resulting in there being some overlap between responses and therefore categories, the data provided is a cumulative indication of further reasons for visiting.

| Category | Overall count | Humberhead Levels count | Fens count | Somerset Levels & Moors count |
|--|----------------------|--------------------------------|-------------------|--|
| Wildlife/flora | 44 | 6 | 32 | 6 |
| Water, boats, fishing | 5 | 5 | 0 | 0 |
| Landscape, (inc. wetlands, woodlands, hedgerows, big skies, views, etc.) | 28 | 7 | 15 | 6 |
| Quality of life (peace, relaxation, get away from it all) | 63 | 10 | 44 | 9 |
| Interest/education in history, culture, archaeology | 29 | 2 | 27 | 0 |
| General interest & specific/non-specific activities | 36 | 19 | 14 | 4 |
| Other | 17 | 4 | 9 | 4 |
| <i>Total responses given</i> | <i>222</i> | <i>53</i> | <i>141</i> | <i>29</i> |

Table 28: Categorised, descriptive further reasons for visits.



Humberhead Levels total responses given: N = 53.
 Fens total responses given: N = 141.
 Somerset Levels & Moors total responses given: N = 29.
 Overall total responses given: N = 222.

Graph 18: Categorized, descriptive further reasons for visits as percentages.

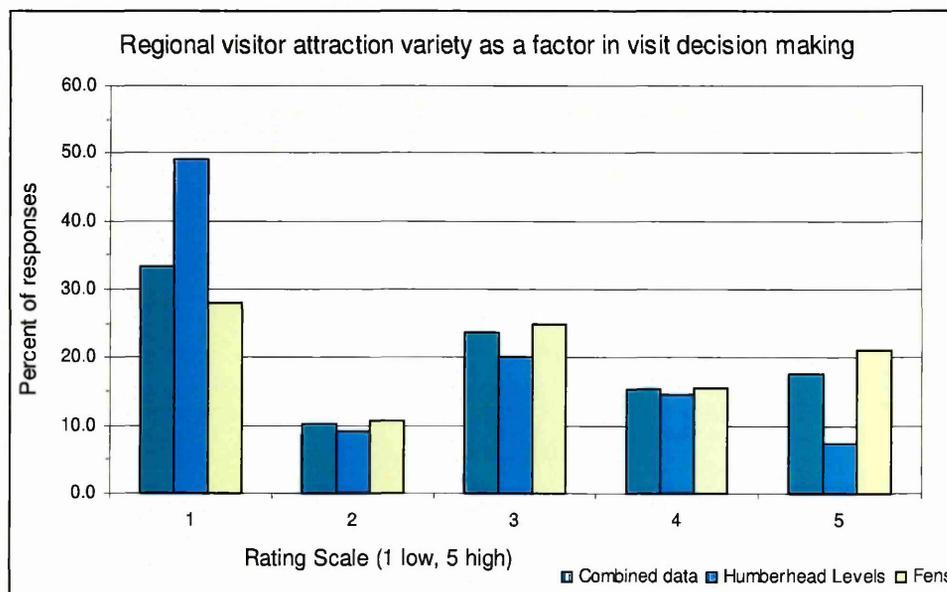
Whilst it was expected that many of the descriptive responses given would be, and are, similar to categories detailed in Table 103 and illustrated in associated graphs, it can be seen from Graph 18 that quality of life issues, such as relaxation, peace, quiet and 'getting away from it all', rate highly within all three regions and therefore overall. However, within the Humberhead Levels, the highest rating category relates to general interest and activities, such as activities for children, a day out and walking. Whilst potentially influenced by the distribution of questionnaires, this high, general interest rating in the Humberhead Levels may be due to the region's proximity to large areas of urban populations. This possibly resulted in a prevalence of more generalist visitors, compared to specialist or enthusiast visitors who are prepared to travel greater distances to visit attractions that fulfil their requirements, examples of such attractions being Wicken Fen and RSPB Ouse Washes.

4.1.10. The importance of attraction variety within study regions.

With respect to the potential for a mix and possible critical mass of visitor attractions to provide an increased visitor draw to the study regions, and in consideration to similar questions within the recreational business questionnaires, visitors were asked to rate the importance of a mix of visitor attractions as a factor in their decision to visit the study

regions. A Likert rating scale was used to assess importance, with ratings of 1 (low) to 5 (high). Graph 19 details the results gained. (It should be noted that there were no responses from questionnaires distributed within the Somerset Levels and Moors regarding the importance of attraction variety within the study regions).

As can be seen from Graph 19, whilst the majority of responses are rated three and above, thus suggesting some importance to visitor attraction variety within study regions, overall and for the Humberhead Levels and Fens regions, 33.3%, 49.1% and 28.1% of responses respectively consider a variety of attractions of low importance in their decision to visit the study regions.

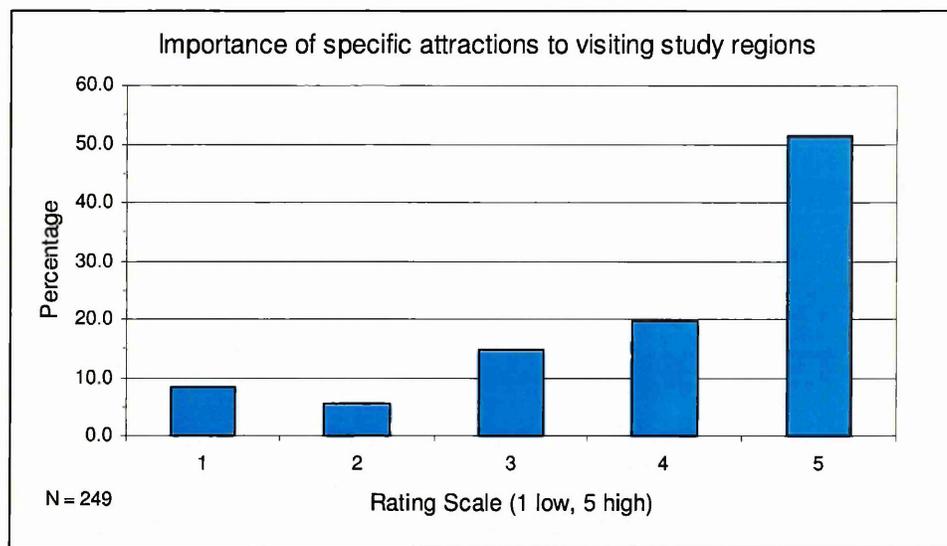


Humberhead Levels: N = 55.
 Fens: N = 161.
 Somerset Levels & Moors: no data.
 Combined data: N = 216.

Graph 19: The importance of visitor attraction variety as a factor in decision making.

4.1.11. Importance of individual attractions in attracting visitors to study regions.

Visitors were further asked of the importance of specific attractions as factors in their decision to visit study regions. Graph 20 details responses overall, whilst Graph 80 illustrates data collected from targeted attractions.



Graph 20: Importance of specific attractions in visiting study regions: combined data.

As can be seen from Graph 20 and Graph 80, the data suggest that targeted attractions (Table 10) were important in attracting visitors to the study regions. Because a targeted attraction is within a study region does not mean the region is important to the visitor. A similar response could have been obtained if the attraction was situated in a region other than a study region. Thus attractions are important in that they caused the visitor to visit the study region through their location within the study region. However, with the targeted visitor attractions being wildlife and nature-based attractions, and with such factors being considered important as visit influencing factors, Graph 13 and Table 26, their importance as visitor attractants is reinforced.

4.1.12. Further attractions visited within the case study regions.

Visitors were asked to provide details of other attractions visited within the study regions. Of those providing details, 78.3% indicated they had visited other attractions. Whilst these were as to be expected, and included attractions such as cathedrals and churches, local towns, country estates and parks, museums and more generic attractions, wildlife and flora related attractions featured regularly in responses. Table 29 details responses per study region and overall.

*It should be noted that many respondents had visited more than one attraction, and thus counts of *all* wildlife/wetland/wildlife-park type attractions may exceed the number of questionnaires indicating visits to such attractions.

| Region | Number of questionnaires indicating wildlife & wetland attractions visited | *Count of <i>all</i> wildlife & wetland attractions visited | *Count of <i>all</i> farm & wildlife-park related attractions, including flower farms, visited | Number of questionnaires indicating wildlife, wetland, farm & wildlife-park related attractions visited |
|------------------------------------|--|---|--|---|
| Humberhead Levels | 9 (34 responses) 26.5% | 15 | 3 | 11 |
| Fens | 58 (132 responses) 43.9% | 77 | 18 | 66 |
| Somerset Levels & Moors | 1 (7 responses) 14.3% | 1 | 0 | 1 |
| <i>Total</i> | 68 (173 responses) 39.3% | 93 | 21 | 78 |

Data does not include visits to country estates & parks, or woodlands.
Total number of responses: 173.

Table 29: Count of wildlife, wetland and farm/wildlife-park related attractions visited.

It can be seen from Table 29 that 39.3% of respondents had visited wildlife and wetland-related attractions. A total of seventy-eight respondents, or 45%, had visited attractions based around wildlife, wetlands, farm or wildlife-park related attractions. Within the Fens region, 43.9% of respondents had visited wildlife and wetland attractions, rising to 50% (sixty-six of 132 respondents) when all wildlife, wetland, farm and wildlife-park related attractions are included. Many visitors visited several wildlife and wildlife-park related attractions, and thus the data suggests a demand for a mix of attractions, with wildlife being an important consideration. Such a mix of attractions gives potential for a cumulative effect with respect to encouraging visitors and resultant visitor impacts, although the potential for visitor displacement from one attraction to another must also be considered.

4.1.13. Visitor perceptions and expectations of the case study regions and surveyed attractions.

With the assumption that flat, level landscapes are unpopular, and that people have poor perceptions of such areas (sections 2.5.0. and 4.2.0.), visitors were asked for their perceptions, expectations and, following their visit, opinions of individual attractions and the study regions.

4.1.13.1. Visitor perceptions and opinions of surveyed attractions.

Visitor's perceptions and expectations of attractions within the study regions were generally realised, with the majority of respondents providing positive comments regarding individual attractions. Of the 185 responses, 109 (58.9%) indicated a positive response, and that their expectations had been met. Twenty-two (11.9%) respondents provided negative comments. The remaining responses were of a general nature, neither especially positive nor negative, although giving an overall impression of expectations being met.

Several negative comments were concerned with aspects such as wheelchair access, the marketing of an attraction or the quality of food, and thus reflect the management or running of an attraction. Whilst such factors are a consideration for any visitor development, the research is more concerned with an overview of an attraction, and less so with specifics. In this respect, Table 30 details the more pertinent negative comments with respect to the visitor attractions surveyed.

| Region | Negative responses |
|-------------------------|--|
| Humberhead Levels | Very small - not enough to do to spend an afternoon here. (Boston Park Farm) Flat uninteresting (<i>landscape to walk through</i>). (Peatland Way opening walk) Hoped to see more wildlife. (Peatland Way opening walk) Featureless farmland. (Peatland Way opening walk) |
| Fens | Expected to see more wildlife than we did. (Wicken Fen) Expected to see more open water and visitor. (Wicken Fen) Site of limited interest. (Flag Fen) Expected it to be flatter and wetter. (Flag Fen) Very low-key for such a well known site. (Flag Fen) A little disappointing. (Flag Fen) Lots to do in advert, people doing demonstrations. When we got there, nothing going on!. (Flag Fen) Flag Fen - found it very flat & uninspiring. (Flag Fen) Expected more - hoped it would be more like Arundel or Slimbridge. (WWT Welney Centre) Less developed than we expected. (WWT Welney Centre) We expected to walk at the side of the marsh where the birds are. (WWT Welney Centre) |
| Somerset Levels & Moors | Limited questionnaire returns. |

Note: no responses for RSPB Blacktoft Sands, Wetlands Waterfowl Animal Reserve, & Waterways Museum.

Table 30: Negative visitor responses regarding attractions within the study regions.

As with negative comments, many positive responses were concerned with the running of attractions and the helpfulness of staff. With respect to a wider overview, Table 31 and Table 106 details the more positive comments with respect to visitor expectations and wildlife factors at visitor attractions surveyed.

| Region | Positive responses |
|-------------------------|---|
| Humberhead Levels | Great for a family afternoon of entertainment. (Boston Park Farm) Our visit gave us more than we expected. (Boston Park Farm) Peatlands a unique experience..... Should prove attractive to nature lovers. (Peatland way opening walk) Potential to develop peat bogsinto a valuable attraction. (Peatland way opening walk) |
| Fens | Tranquil & secluded. Very pleasant. (Wicken Fen) Attractive as it's a wildlife haven. (Wicken Fen) Peace & tranquillity & a high standard of flora & fauna. (Wicken Fen) Did not expect the area to be quite so interesting & containing such a range of flora & fauna. (Wicken Fen) Much more interesting than I expected, & also a haven for wildflowers, birds. (Flag Fen) Never visited the area before but will certainly do so again. (Flag Fen) Always a pleasant place to visit because of the wildfowl. (WWT Welney Centre) Excellent birdwatching experience. (WWT Welney Centre) Very tranquil. (WWT Welney Centre) Overwhelmed at the beauty of the wetlands and the birds. (WWT Welney Centre) Second to nonefor observing birds & wildlife. (WWT Welney Centre) Would visit again. (WWT Welney Centre) Gathering of swans spectacular far exceeded my expectations. (WWT Welney Centre) An excellent day bird watching. (2 similar responses). (RSPB Ouse Washes) Wild and remote place (as perceived). (RSPB Ouse Washes) Expectations realised. Impressed with peacefulness of site. (RSPB Ouse Washes) The Washes are lovely. (RSPB Ouse Washes) Underestimated the tranquillity & beauty & the number of birds. (RSPB Ouse Washes) |
| Somerset Levels & Moors | Quietness & unspoiled area. (unknown Somerset attraction) Far better than expected. (unknown Somerset attraction) |

Table 31: Positive visitor responses regarding attractions within the study regions.

As Table 30, Table 31, and Table 106 illustrate, from visitor responses received there is a greater number of positive responses regarding attractions, with wildlife aspects featuring highly in visitor's comments.

4.1.13.2. Visitor perceptions and opinions of study regions.

With respect to expectations and opinions of study regions, data again suggests a greater positive response from visitors. From 179 responses, eighty-seven visitors (48.6%) gave positive responses, whilst twenty-four visitors (13.4%) gave negative responses, with the remainder of a 'neutral' stance. Table 32 and Table 33 detail the more pertinent negative and positive responses respectively, whilst Table 34 details responses that offer contrasting expectations and opinions. Further responses are detailed in Table 107, Table 108, and Table 109 within Appendix One, respectively.

| Region | Negative responses |
|-------------------------|--|
| Humberhead Levels | Visitor attractions generally of lower quality than in other parts of Yorkshire. Area is not particularly scenically attractive. The managed landscape is often spoilt by poor quality/design industrial & farm buildings. Never heard of the Humberhead Levels before. |
| Fens | Flat & uniform! Hard to pick out any memorable sites. Generally not attractive. 'Agri-business' is a priority <u>not</u> wildlife. Nothing to see or do really. Flat, boring agricultural landscape. We rarely <u>stop</u> in the Fens. We drive across them. Poor part of the country, nothing going on. Areas of intensively farmed mono-cultures - as anywhere - ornithologically sterile. Mainly boring countryside. |
| Somerset Levels & Moors | <i>No negative responses for the Somerset Levels & Moors.</i> |

Table 32: Negative visitor responses regarding study regions.

| Region | Positive responses |
|-------------------------|--|
| Humberhead Levels | A pleasant area to visit..... obvious potential for attracting more visitors. Very quiet, out of the way. Enjoyed. There are more attractions than I realised. A great deal of places to visit with easy access. Much more interesting than I thought it would be. |
| Fens | Loved the openness & big skies. Good birdwatching area. The Fens are a unique English heritage. It is a great <u>alternative</u> to urbanity. Love open spaces & skies - fewer people & rush love the mood of the landscape. Beauty of the landscape is unique. The large sky & wonderful views. I like the wildness. Have always loved the peace, tranquillity & openness of the Fens. Mysterious & challenging. Fens are always full of wonderment. Beautiful. Magical. Fantastic landscape - fantastic quality of light & vistas of Ely Cathedral. Tranquillity - birdwatching relaxing from trials & tribulations at home! Great landscapes. Interesting landscapes of agriculture & open water courses. Unexpectedly attractive towns, good roads. |
| Somerset Levels & Moors | Region is now being managed well for wildlife. Have known this region for years - it is still unspoiled as ever. Scenery & solitude far better than envisaged. |

Table 33: Positive visitor responses regarding study regions.

| Responses. |
|---|
| <ul style="list-style-type: none"> • Flat & dull were my expectations. It grows on you, friendly atmosphere everywhere. Waterways a delight. Landscape becomes more interesting, the sky so vast! • Flat, cold, windy. Flat, beautiful skies, moderate weather. • Expectations were fairly low as perceived to be rather flat & featureless landscape. Therefore surprised to find so much history associated with the area & soon began to enjoy what is in fact a rather unique part of the UK. • Quite bleak & unendingly flat, but interesting to drive around. • Might be boring. Found it fascinating. • Fens; beautiful/interesting. Lovely but could do with more coffee shops/gift shops/attractions. • Very beautiful in good weather but can feel oppressive because of the flatness. • Flat landscapes & open skies. Interesting flora. |

Note: no contrasting responses within the Humberhead Levels or Somerset Levels & Moors.
These responses are *not* detailed in previous tables.

Table 34: Visitors expectations & realisations within the Fens.

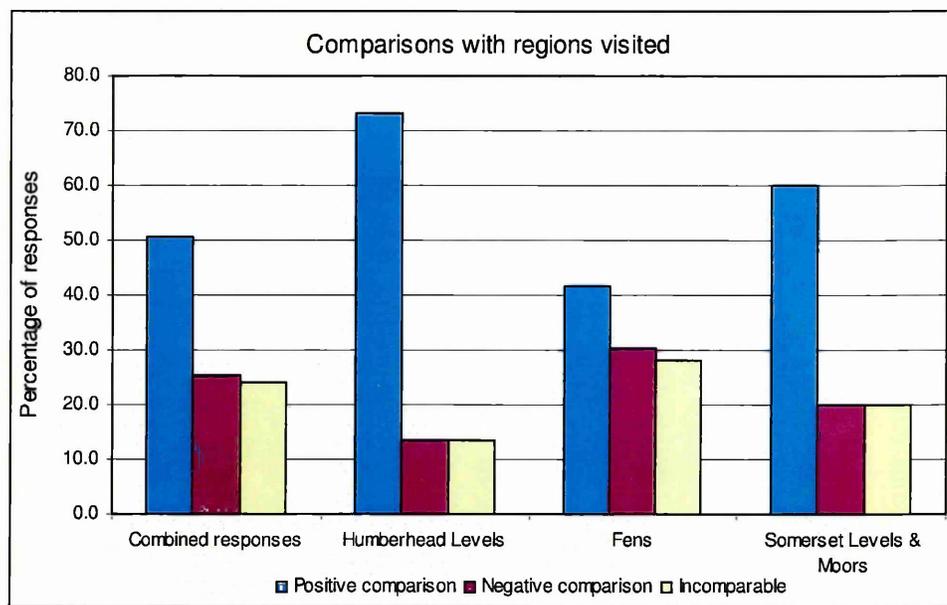
As Table 34 and Table 109 show, whilst perceptions of the Fen region can be negative, upon visiting, such perceptions can be altered, although not in all cases. Regular terms used to describe the Fen landscape include;

- 'flat', occurring twenty-three times, plus once within the Humberhead Levels,
- Sky-related terms, occurring fourteen times & once within the Humberhead Levels.
- Open/openness related terms, occurring nine times.

Whilst the use of these terms can be negative or positive, frequently, 'flat' is used in a descriptive manner but with no obvious negative or positive implications. Sky-related terms, such as big skies, and openness, are often used in a positive context, suggesting these aspects of the region, and thus the landscape of the region, give the Fens a uniqueness which visitors find appealing, as noted by positive responses. Overall, sky-related terms occur ten times in a positive context. The term 'landscape' itself is used sixteen times within regional responses, exclusively from the Fens study region. Whilst some uses of 'landscape' are descriptive only, nine uses of 'landscape' occur in a positive context, with four used in a more negative context. Two of these are then qualified in a positive context, thus the Fen landscape is referred to positively eleven times out of sixteen.

4.1.14. Comparisons of case study regions to other UK regions visited.

Visitors were asked to compare the study regions with other regions visited, and asked to detail those other regions. Within the UK, other regions visited are as expected, and include Scotland and Wales, and areas of England such as Norfolk, Yorkshire, Devon and Cornwall, the Peak and Lake Districts, national parks and similar. In asking for comparisons to other areas visited, whilst many visitors offered comparisons, others declined, on the basis of each region being unique, and thus incomparable. Graph 21 illustrates the number comparative and 'incomparable' responses given.



Humberhead Levels: N = 37.

Fens: N = 96.

Somerset Levels & Moors: N = 5.

Number of useable, comparison related responses: N = 138.

Graph 21: Comparisons of study regions to other regions visited.

As can be seen from Graph 21, in visitor's opinions the study regions, combined or individually, compare well with other regions visited. Many comments made are supportive of the study regions, and the unique qualities the study regions contain, particularly the Fens. It should be noted that some responses, particularly in the Humberhead Levels, are related to birdwatching sites, and thus the region is being compared to other birdwatching regions in some instances. However, such responses are relevant with respect to the research and nature-based leisure and recreation.

Graph 21 is an *indication only* of the comparison of the study areas with other areas frequented by visitors. Of the 206 responses given, sixty-eight neither compared regions or commented that comparisons were an irrelevance, i.e. incomparable. Such other responses were frequently observations on the merits or otherwise of the study regions, or non-committal answers. Table 35 and Table 110 detail examples of such comments and comments related to comparisons made.

| Region | Responses given |
|------------------------------------|--|
| Humberhead Levels | There are not many features which justify a journey/diversion. Birding - very good. Birding is all we come for. Very favourably! It's lovely, accessible, & fascinating. To make a direct comparison is unfair. It is clear that it is a region just realising its potential. It needs firm planning directions to achieve its goals. |
| Fens | I do not think you can compare the Fens with anywhere else because the whole area is so unique. Poorly compared to Northumberland, Yorkshire Dales, Lake District & Scotland. The Fens have an individuality unlike any other region. Unlike any other region.....very important to keep. The Fens are comparable with any region in the world. Flat boring scenery.....anywhere really is more attractive. No hills, no trees, not much here. Fens are visually unattractive. The Fens have a character all of their own like no other part of the country. Comparing Fens with other regions is like comparing chalk & cheese. Every region has its own charm - don't compare. The Fens are much less interesting as they are so flat. The Fens gives a much more easily coped with experience Very pleasing to the eye. Interesting because different. Fens scenery not as varied or 'wild'.... unique Fens tranquillity and reduced tourist numbers have their own appeal. |
| Somerset Levels & Moors | Each experience is unique - can't compare. |

Table 35: Visitor comments made when comparing regions visited.

4.1.15. Visitor likes and dislikes of the case study regions.

Visitors were asked to detail their likes and dislikes of the study regions. 126 responses (64.6%) detailed factors that were liked within the study regions, whilst sixty-eight (34.9%) detailed dislikes. Generally, respondents gave likes or dislikes and not both, although thirty-six respondents did give both likes and dislikes. The remaining thirty-seven responses (of a total of 195 responses) either had no particular likes or dislikes or did not specify any, or were concerned with factors outside the scope of the research, such as speed limits. Table 36 details positive and negative responses, based on likes and dislikes, within descriptor categories, including a count of descriptors relative to each study region. Table 37 and Table 111 detail examples of responses with respect to likes and dislikes. As can be seen from the tables, factors such as the openness, big skies, landscape and wildlife are generally presented as positive factors. Negative factors are comparatively few overall, but include roads and transport, the attractiveness of towns and villages along with associated facilities, and the flat, agri-industry landscape.

| Descriptor | Total | | Humberhead Levels | | Fens | | Somerset Levels & Moors. | |
|---|----------|----------|-------------------|----------|----------|----------|--------------------------|----------|
| | Positive | Negative | Positive | Negative | Positive | Negative | Positive | Negative |
| Facilities/attractions | 14 | 7 | 5 | 0 | 6 | 7 | 3 | 0 |
| Landscape (sky/openness/flatness/space/bleak) | 64 | 26 | 10 | 3 | 52 | 23 | 2 | 0 |
| Peace/tranquillity | 15 | 0 | 5 | 0 | 10 | 0 | 0 | 0 |
| Roads (transport/traffic/access) | 7 | 16 | 3 | 2 | 4 | 13 | 0 | 1 |
| Towns/villages | 13 | 8 | 6 | 2 | 6 | 6 | 1 | 0 |
| Walking/cycling/paths/cycleways | 9 | 2 | 3 | 2 | 3 | 0 | 3 | 0 |
| Water/rivers/canals | 14 | 1 | 5 | 1 | 9 | 0 | 0 | 0 |
| Wetlands, wildlife & flora | 45 | 0 | 12 | 0 | 32 | 0 | 1 | 0 |

Humberhead Levels: N = 44.

Fens: N = 142.

Somerset Levels & Moors; N= 9.

Total response number: N = 195.

Count based on number of times descriptor categories occur in responses.

Table 36: Positive and negative counts of descriptor categories by study region.

| Region | Response |
|------------------------------------|--|
| Humberhead Levels | The peat moors are very different to other areas, & are well worth visiting. Negative aspects a monotonous, flat agricultural area, devoid of hedges & trees. Don't like Goole. Like landscape & wildlife. Not to crowded. Nice & peaceful. Like the flat, open land; historic, picturesque villages, friendly people, variety available. To flat for me. But good for cycling. Rivers get in the way of direct routes. Motorways carve up the countryside. Some nice villages off the beaten track. |
| Fens | Scenically unattractive. Little regard for wildlife - with the exception of wildlife reserves. Likes: wetlands & associated wildlife, wide skylscapes. Do not like the flatness. We like the remoteness although still close to Ely/Cambridge I like the open spaces & waterways. I enjoy the cloud formations & wide views. I like the fact that it stretches all around you. Wonderful open skies of fenland. Public transport is restrictive & unreliable. The landscape/wildlife wonderful - highest quality. Not many trees & shady bits. Everywhere looked the same, not very green. The flatness & general bleakness of the area do not encourage me to visit. Landscape beautiful. No attractive villages. Open huge wheat & cereal fields are an eyesore ... trees & buildings are beautifully silhouetted. Rather depressing flat landscape, lack of trees, uninteresting villages. Wonderful open skies & vast variety of wildlife. |
| Somerset levels & Moors | The views are stunning! The roads are very uneven. Like the rural scenery, & cycle tracks. |

Table 37: Examples of visitor responses of likes and dislikes.

4.1.16. Visitor ratings of study regions as visitor destinations.

Visitors were asked to rate the study regions as visitor destination, on a Likert scale of 1 to 5 (1, low: 5, high). Table 38 details the ratings given for each region, whilst Table 39 and Graph 22 illustrate the results as percentages.

| Region | Rating (actual counts) | | | | |
|---------------------------|------------------------|----|----|----|----|
| | 1 | 2 | 3 | 4 | 5 |
| Humberhead Levels | 2 | 15 | 17 | 22 | 2 |
| Fens | 15 | 18 | 52 | 48 | 30 |
| Somerset Levels & Moors | 0 | 1 | 1 | 7 | 1 |
| <i>Total; all regions</i> | 17 | 34 | 70 | 77 | 33 |

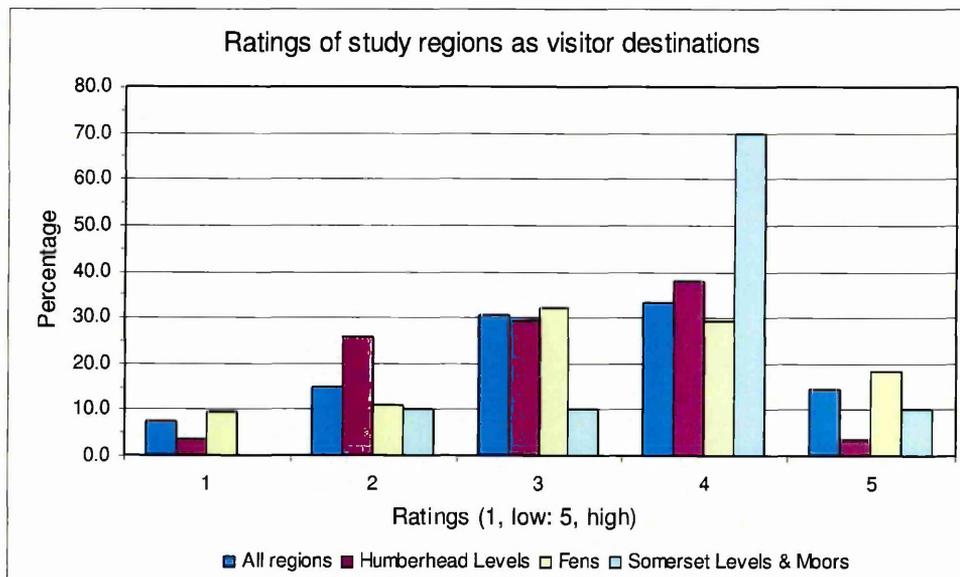
Humberhead Levels: N = 58.
 Fens: N = 163.
 Somerset Levels & Moors: N = 10.
 Total: N = 231.

Table 38: Ratings of study regions as visitor destinations.

| Region | Ratings (as percentages) | | | | |
|---------------------------|--------------------------|-------|-------|-------|-------|
| | 1 | 2 | 3 | 4 | 5 |
| Humberhead Levels | 3.4% | 25.9% | 29.3% | 37.9% | 3.4% |
| Fens | 9.2% | 11.0% | 31.9% | 29.4% | 18.4% |
| Somerset Levels & Moors | 0 | 10.0% | 10.0% | 70.0% | 10.0% |
| <i>Total: all regions</i> | 7.4% | 14.7% | 30.3% | 33.3% | 14.3% |

Humberhead Levels: N = 58.
 Fens: N = 163.
 Somerset Levels & Moors: N = 10.
 Total: N = 231.

Table 39: Ratings of study regions as visitor destinations, as percentages.



Humberhead Levels: N = 58.
 Fens: N = 163.
 Somerset Levels & Moors: N = 10.
 Total: N = 231.

Graph 22: Ratings of study regions as visitor destinations.

As can be seen, the majority of responses fall in ratings bands three and four, at 30.3% and 33.3% for 'all regions' respectively, with 70% of Somerset Levels and Moors visitors rating that region a '4'. Thus the data indicates that visitors predominantly rate the study regions moderately highly, although only 14% of responses for 'all regions' occur in the '5' rating band. The limited number of responses within the '1' ratings band

indicates that, whilst some visitors rate the study regions as poor visitor destinations, they are comparatively few.

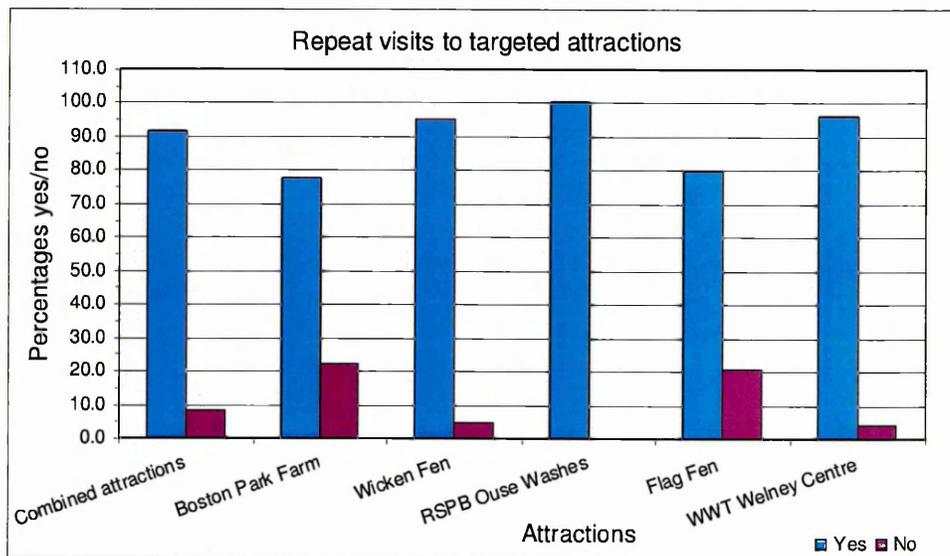
4.1.17. The likelihood of repeat visits to attractions and case study regions.

Visitors were asked to indicate whether or not they would make repeat visits to targeted attractions and case study regions, using simple 'yes - no' tick boxes. Table 40 and Table 41, and Graph 23 and Graph 24, illustrate the data results. From these tables and graphs, it can be seen that by far the majority of visitors indicated that they would make repeat visits to both targeted attractions and the study regions.

| Region | Attraction | Repeat visit to attraction | | Total (N value) |
|--------------------------|-------------------|----------------------------|-----------|--------------------|
| | | Yes | No | |
| Humberhead Levels | Boston Park Farm | 7 | 2 | 9 |
| Fens | Wicken Fen | 20 | 1 | 21 |
| | RSPB Ouse Washes | 29 | 0 | 29 |
| | Flag Fen | 35 | 9 | 44 |
| | WWT Welney Centre | 72 | 3 | 75 |
| | <i>Total</i> | <i>163</i> | <i>15</i> | <i>178</i> |

No Somerset Levels & Moors data.

Table 40: Numbers of repeat visits to targeted attractions.



No Somerset Levels & Moors attraction data.

Boston Park Farm: N = 9.

Wicken Fen: N = 21.

RSPB Ouse Washes: N = 29.

Flag Fen: N = 44.

WWT Welney Centre: N = 75.

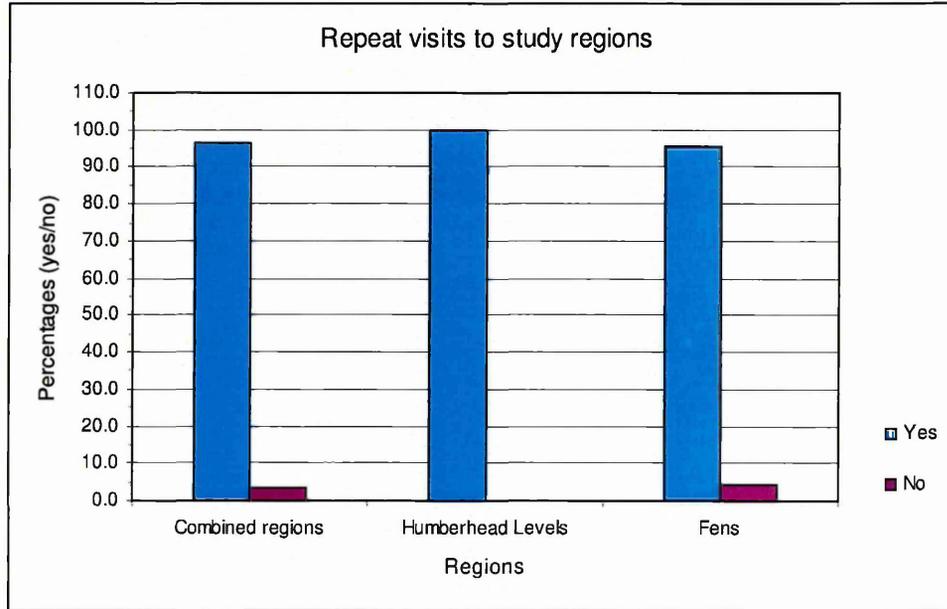
Total: N = 178.

Graph 23: Repeat visits to targeted attractions.

| Region | Repeat visit to region | | Total (N value) |
|-------------------|------------------------|----|--------------------|
| | Yes | No | |
| Humberhead Levels | 53 | 0 | 53 |
| Fens | 149 | 7 | 156 |
| Total | 202 | 7 | 209 |

No Somerset Levels & Moors data.

Table 41: Numbers of repeat visits to study regions.



No Somerset Levels & Moors data.

Humberhead Levels: N = 53.

Fens: N = 156.

Total: N = 209.

Graph 24: Repeat visits to study regions.

4.1.17.1. Repeat visits to attractions and case study regions: descriptive responses.

As well as being asked to indicate whether or not they would make repeat visits, visitors were also asked to qualify with descriptive answers their reasons for undertaking repeat visits or not. Table 42 and Table 43, supported by Table 112 and Table 113, detail examples of reasons given.

| Attraction | Descriptive response |
|--------------------------|--|
| Boston Park Farm | My children enjoyed themselves, they also had the bonus of seeing farm animals too. One visit is sufficient - 'got the T-shirt'. Good local attraction. Good fun, picnic area, local. |
| Wicken Fen | Want to spend more time looking for wildlife. Interested to see at different seasons of the year. So much of interest for us. We would like to come at different times of the year. Because its local, & we are National Trust members. |
| Flag Fen | Interesting events & on-going archaeology. To take part in another workshop & special days. Been there done that. Still more to see. To show relations & friends the site. Not much tourist value, would I take a friend or visitor, no! Not interesting enough for a whole day. Children need something interaction with things. Kids like it: adults like it & it is different every time we go: we have watched it develop. |
| WWT Welney Centre | Because we enjoy bird watching. Good birdwatching facilities & excellent shop & restaurant. Not as interesting as expected. Too far off the beaten track and extremely badly signed. In winter for migrant birds. Its an entertaining day out. To bring my grandchildren again in winter. It is warm & suitable for children. Close to home, floodlit (swan) feeding excellent. We are interested in wildlife & found it very interesting. To visit the swans in winter & other wildlife in summer. |
| RSPB Ouse Washes | Local & interesting. For the number of birds & wildfowl. Seasonal fluctuations and changes re. birds. We enjoy the birdwatching at all times of the year & the beauty of the scenery. It suits us for birding & walks. |

Table 42: Reasons for repeat visits to attractions: descriptive responses.

| Region | Descriptive response |
|------------------------------------|---|
| Humberhead Levels | Possibly. More so as areas visited are made more accessible, wildlife encouraged. Yes, to see the development of the natural sites & wetland areas. Yes - ecology of the area. Blacktoft for the birds. Close to home. Areas of unspoilt countryside. There are so many places of interest to explore in the future. Lovely area, so much more to see. |
| Fens | To see the parts we didn't have time for. To see the area at different time of year. For the peace & quiet. I would not be visiting if it were not for family & friends. Its close enough for a day-trip. Very many places of interest for all ages throughout the area. Always something to see. Be nice to explore. Like the low traffic congestion. Quiet, unspoilt, good walking & cycling. I like walking & do not consider it to be a good walking area. Do not visit Fens except to get to Welney. Because of Welney & RSPB reserve. Love the area. Landscape & settlements & wildlife. No attraction apart from birding. Access to wildlife. Not if I could help it - its flat & boring. |
| Somerset Levels & Moors | Yes for the freedom to roam & watch wildlife at close range. Probably to quiet for many to return but not for all who like unspoiled areas. |

Table 43: Reasons for repeat visits to study regions: descriptive responses.

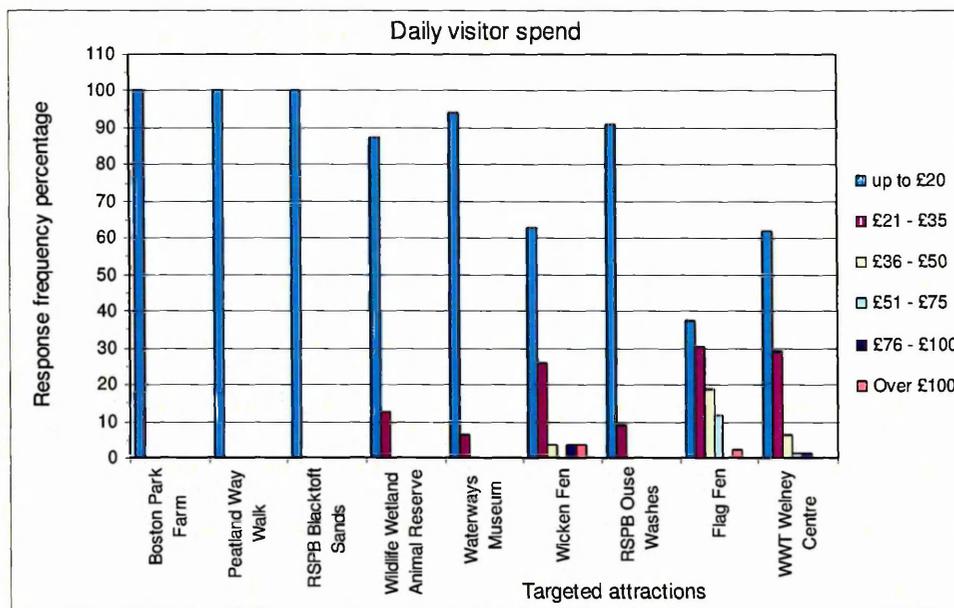
Whilst many descriptive responses are general in nature, and include seeing friends and family and days out with family, of the 189 responses, fifty (26.6%) give wildlife and birdwatching as a factor for repeat visits to the study regions. Thirty-four responses (18%) indicated a desire to explore the study regions further on repeat visits, including simply 'seeing more' and there being many places of interest to visit. However, overall the responses indicate that many visitors simply desire to spend time in attractive, peaceful and interesting surroundings, and that the study regions, for the majority, fulfil this desire.

4.1.18. An estimation of daily visitor spend.

Visitors were asked for details of their daily spend, excluding accommodation. Spend categories were used to encourage questionnaire completion. Table 44 and Graph 25 details the results by targeted attraction in response frequency and percentages respectively, whilst Table 45 and Graph 26 details results by study region in response frequency and percentages respectively.

| Attraction | Approximate daily visitor spend | | | | | | Total |
|--|---------------------------------|-----------|-----------|----------|----------|-----------|------------|
| | Up to £20 | £21-£35 | £36-£50 | £51-£75 | £76-£100 | Over £100 | |
| Boston Park Farm | 9 | | | | | | 9 |
| Peatland Way Walk | 8 | | | | | | 8 |
| RSPB Blacktoft Sands | 22 | | | | | | 22 |
| Wildlife Wetland Animal Reserve | 7 | 1 | | | | | 8 |
| Waterways Museum | 15 | 1 | | | | | 16 |
| Wicken Fen | 17 | 7 | 1 | | 1 | 1 | 27 |
| RSPB Ouse Washes | 20 | 2 | | | | | 22 |
| Flag Fen | 16 | 13 | 8 | 5 | | 1 | 43 |
| WWT Welney Centre | 41 | 19 | 4 | 1 | 1 | | 66 |
| <i>Total</i> | <i>155</i> | <i>43</i> | <i>13</i> | <i>6</i> | <i>2</i> | <i>2</i> | <i>221</i> |

Table 44: Daily visitor spend by frequency at targeted attractions.

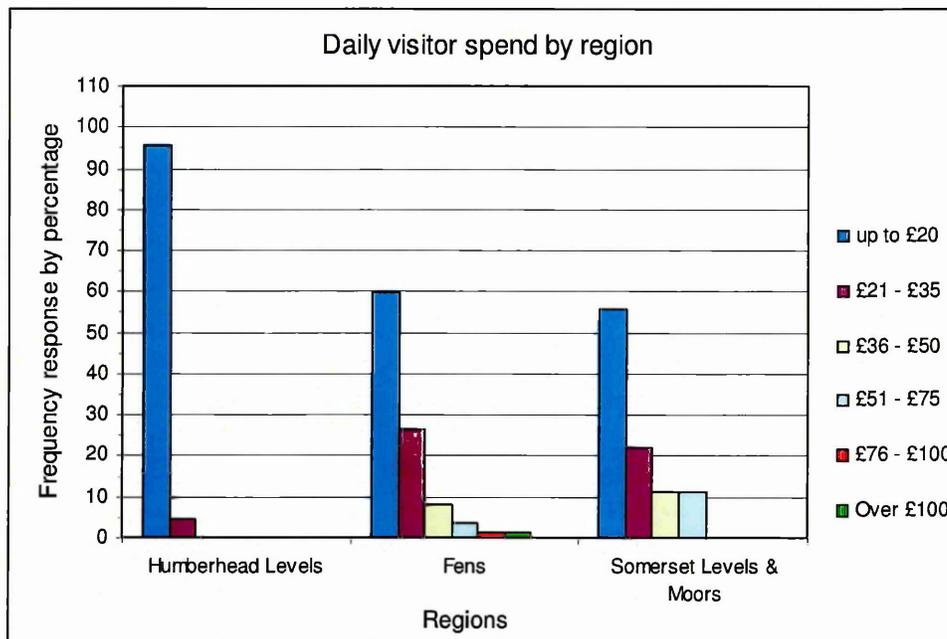


Boston Park Farm: N = 9.
 Peatland Way Walk: N = 8.
 RSPB Blacktoft Sands: N = 22.
 Wildlife Wetland Animal Reserve: N = 8.
 Waterways Museum: N = 16.
 Wicken Fen: N = 27.
 RSPB Ouse Washes/Welches Dam: N = 22.
 Flag Fen: N = 43.
 WWT Welney Centre: N = 66.
 Total: N = 221.

Graph 25: Daily visitor spend by targeted attraction, as a percentage.

| Region | Approximate daily visitor spend | | | | | | Total |
|------------------------------------|---------------------------------|---------|---------|---------|----------|-----------|-------|
| | Up to £20 | £21-£35 | £36-£50 | £51-£75 | £76-£100 | Over £100 | |
| Humberhead Levels | 66 | 3 | | | | | 69 |
| Fens | 97 | 43 | 13 | 6 | 2 | 2 | 163 |
| Somerset Levels & Moors | 5 | 2 | 1 | 1 | | | 9 |
| Total | 168 | 48 | 14 | 7 | 2 | 2 | 241 |

Table 45: Daily visitor spend frequency by region.



Humberhead Levels: N = 69.
 Fens: N = 163.
 Somerset Levels & Moors: N = 9.
 Total: N = 241.

Graph 26: Daily visitor spend by region, as a percentage.

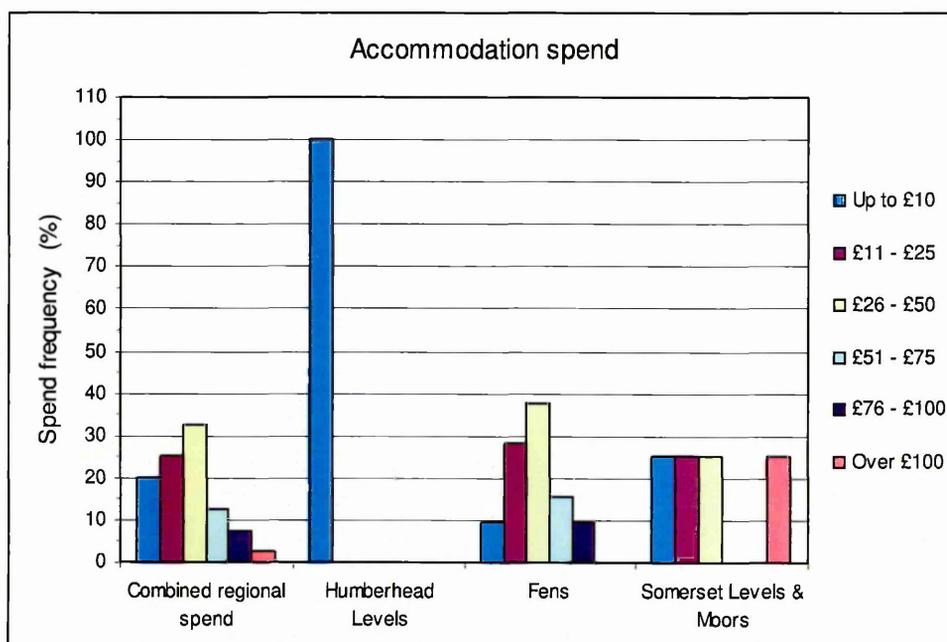
As can be seen from the visitor spend data, 69.7% of visitor spend is within the 'up to £20' range, the predominant spend range for all attractions and all regions. A further 19.9% of spend falls within the £21 - £35 range. As could be expected, visitor responses indicate that spend per category lessens as the spend category value increases, with 89.6% of spend being within the two lowest spend categories.

4.1.19. Estimated visitor spend on accommodation.

Spend on accommodation was categorised after data collection to simplify analysis. Table 46 details the categories and spend frequency per category by study region. With the predominance of day-visitors and the incompleteness of individual questions within questionnaires, data on accommodation spend is limited to forty samples, equating to 14.9% of the 268 samples indicating a length of stay, and 59.7% of the sixty-seven samples indicating an overnight stay. Graph 27 details the proportionate spend per category by region.

| Spend categories | Region | | | Total |
|------------------|-------------------|------|-------------------------|-------|
| | Humberhead Levels | Fens | Somerset Levels & Moors | |
| Up to £10 | 4 | 3 | 1 | 8 |
| £11 - £25 | | 9 | 1 | 10 |
| £26 - £50 | | 12 | 1 | 13 |
| £51 - £75 | | 5 | | 5 |
| £76 - £100 | | 3 | | 3 |
| Over £100 | | | 1 | 1 |
| Total | 4 | 32 | 4 | 40 |

Table 46: Accommodation spend frequency.



NOTE: due to limited accommodation spend data obtained from the Humberhead Levels and Somerset Levels & Moors, Table 46, spend data presented is atypical in consideration to the bulk of the data collected in the Fens.
Humberhead Levels: N = 4.
Fens: N = 32.
Somerset Levels & Moors: N = 4.
Total: N = 40.

Graph 27: Proportionate spend by study region.

As can be seen from the data, overall, 45% of visitors spend less than £25 on accommodation, with no visitors within the Humberhead Levels spending over £10. A further 32.5% of overall visitors spend between £26 and £50. However, within the Fens only, 28.1% of visitors spend between £11 and £25, with 37.5% of Fen visitors spending between £26 and £50 on accommodation. Overall, the mean spend on accommodation for all study areas was £16.14 per person, based on ninety-eight visitors paying for accommodation, from forty surveys detailing accommodation spend. By comparison, mean accommodation spend within the Fens only, based on seventy-two

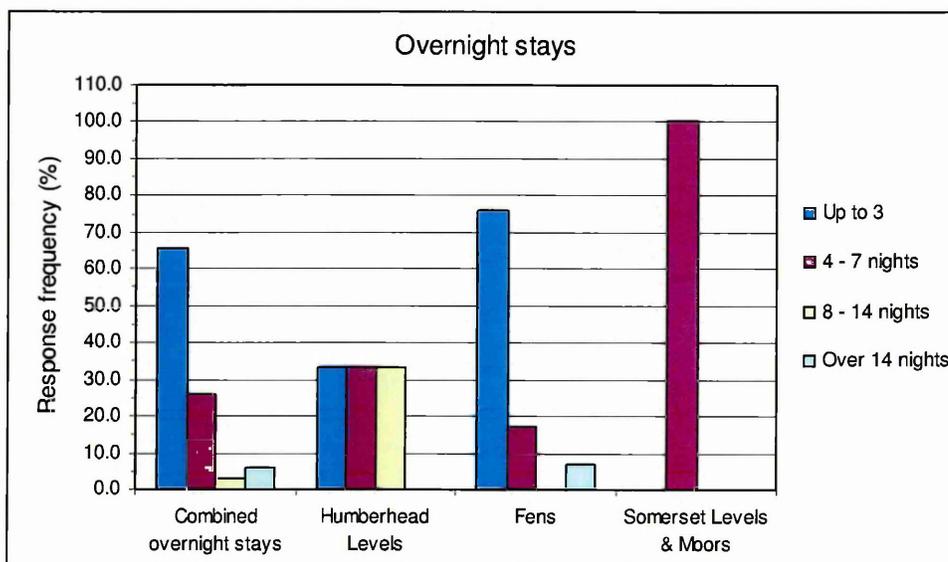
visitors from thirty-two survey responses, is £18.08, reflecting the broader range of paying accommodation types used within the Fens, Graph 12. The low sample numbers for the Humberhead Levels and Somerset Levels and Moors should be noted.

4.1.20. Length of overnight staying visits.

Length of overnight stay data, Table 47 and Graph 28, limited to 35 samples, shows that the majority of overnight staying visitors, 65.7% overall, stayed for up to three nights. Within the Fens, stays of up to three nights accounted for 75.9% of staying visitors. Such figures suggest that overnight visitors are predominantly within the one to three night, 'weekend-short break' category. 25.7% of all staying visitors stayed between four and seven nights, with 17.2% of staying visitors to the Fens within the same category.

| Number of nights stayed | Region | | | Total |
|-------------------------|-------------------|------|-------------------------|-------|
| | Humberhead Levels | Fens | Somerset Levels & Moors | |
| Up to 3 | 1 | 22 | | 23 |
| 4 - 7 nights | 1 | 5 | 3 | 9 |
| 8 - 14 nights | 1 | | | 1 |
| Over 14 nights | | 2 | | 2 |
| <i>Total</i> | 3 | 29 | 3 | 35 |

Table 47: Length of overnight stay by region.



Note limited number of responses for the Humberhead Levels and Somerset Levels & Moors, Table 47.
Humberhead Levels: N = 3.
Fens: N = 29.
Somerset Levels & Moors: N = 3.
Total: N = 35.

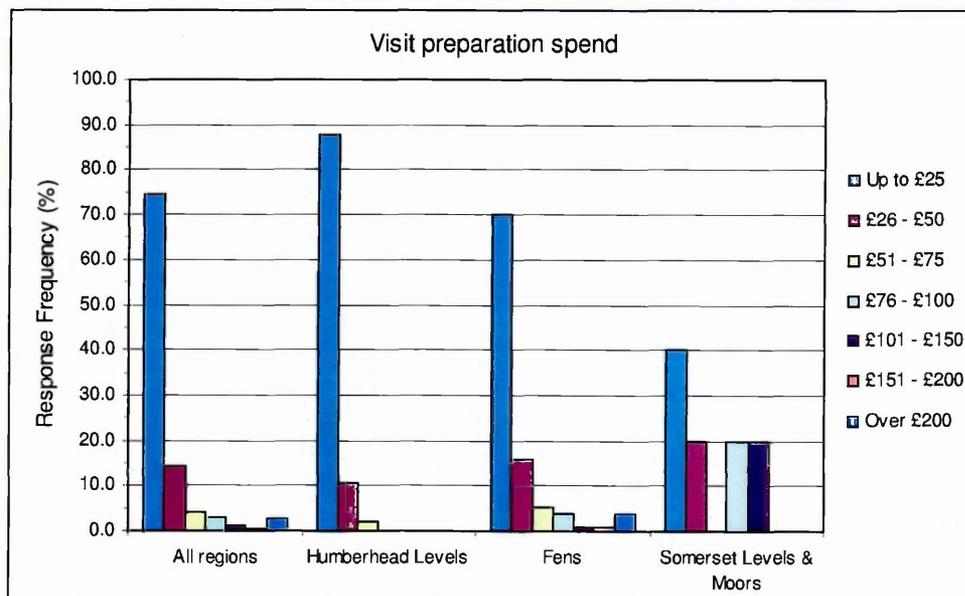
Graph 28: Proportions of overnight stay by region.

4.1.21. Visitor spend on visit preparation.

In order to ascertain the greater potential impact of visitor spend, visitors were asked to detail approximate spend in preparation for their visit, including travel costs, through the use of spend categories. Table 48 details the frequency of spend per category, with Graph 29 illustrating the proportionate spend by category, per region.

| Spend categories | Region | | | Total |
|------------------|-------------------|------------|-------------------------|------------|
| | Humberhead Levels | Fens | Somerset Levels & Moors | |
| Up to £25 | 50 | 93 | 2 | 145 |
| £26 - £50 | 6 | 21 | 1 | 28 |
| £51 - £75 | 1 | 7 | | 8 |
| £76 - £100 | | 5 | 1 | 6 |
| £101 - £150 | | 1 | 1 | 2 |
| £151 - £200 | | 1 | | 1 |
| Over £200 | | 5 | | 5 |
| Total | 57 | 133 | 5 | 195 |

Table 48: Visit preparation spend.



Humberhead Levels: N = 57.
 Fens: N = 133.
 Somerset Levels & Moors: N = 5.
 Total: N = 195.

Graph 29: Proportionate visit preparation spend.

Overall visit preparation spend falls predominately within the 'up to £25' category, with 74.4% of responses being within this category. Within the Humberhead Levels and the Fens, 87.7% and 69.9% of preparation spend falls within the 'up to £25' category

respectively. A further 14.4% of overall visit preparation spend is within the following, £26 - £50 category, with 15.8% of visit preparation spend in the same category within the Fens region.

4.1.22. Visitor demographics.

4.1.22.1. Visitor party numbers.

| Region | Adult male | Adult female | Children | Total |
|------------------------------------|-------------------|---------------------|-----------------|--------------|
| Humberhead Levels | 66 | 62 | 53 | 181 |
| Fens | 208 | 220 | 33 | 461 |
| Somerset Levels & Moors | 11 | 11 | 6 | 28 |
| Total | 285 | 293 | 92 | 670 |

Questionnaire response: N = 250.

Table 49: Visitor party make up.

The data shows that adult males and females make up approximately equal numbers within the study regions and overall, Table 49. However, the proportion of children in each region has greater variation. Within the Humberhead Levels, children make up 29.3% of visitors, whilst within the Somerset Levels and Fens, the proportions are 21.4% and 7.2% respectively. Overall, children comprise 13.7% of visitors.

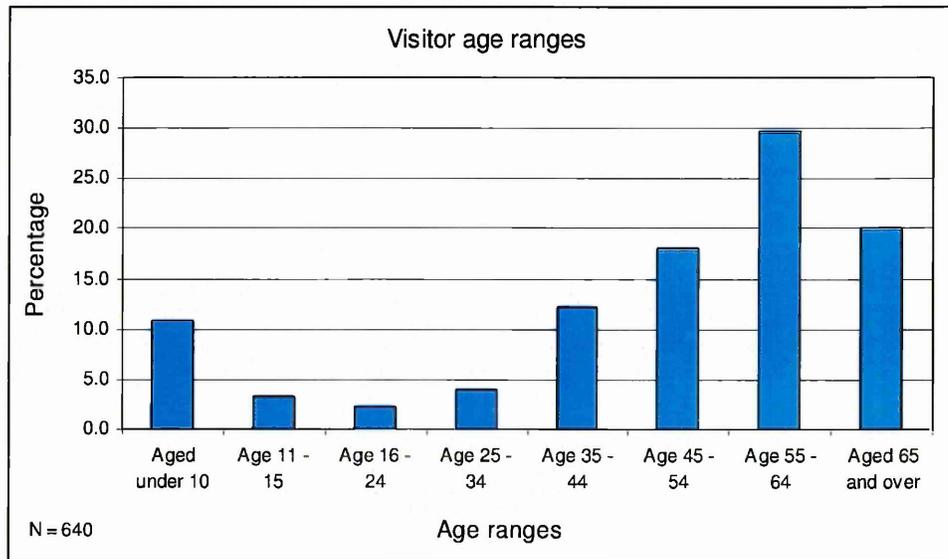
4.1.22.2. Visitor age range.

The age ranges of visitors are detailed in Table 50 and Graph 30. From the graph and table it can be seen that the majority of visitors are aged 45 and over, with 29.7% within the '55 - 64' age category. 18% and 20% are within the '45 - 54' and 'aged 65 and over' categories respectively. The data also illustrates that whilst children under ten years of age represent 10.8% of visitors, the combined visitor numbers for those aged between eleven and thirty-four comprise less than 10% of all visitors.

| Age categories | Number per category |
|--|---------------------|
| No. of visitors aged under 10 | 69 |
| No. of visitors age 11 - 15 | 21 |
| No. of visitors age 16 - 24 | 14 |
| No. of visitors age 25 - 34 | 25 |
| No. of visitors age 35 - 44 | 78 |
| No. of visitors age 45 - 54 | 115 |
| No. of visitors age 55 - 64 | 190 |
| No. of visitors aged 65 and over | 128 |
| <i>Total number of visitors (giving age details)</i> | <i>640</i> |

Questionnaire response: N = 232.

Table 50: Visitor age ranges by category; all regions.



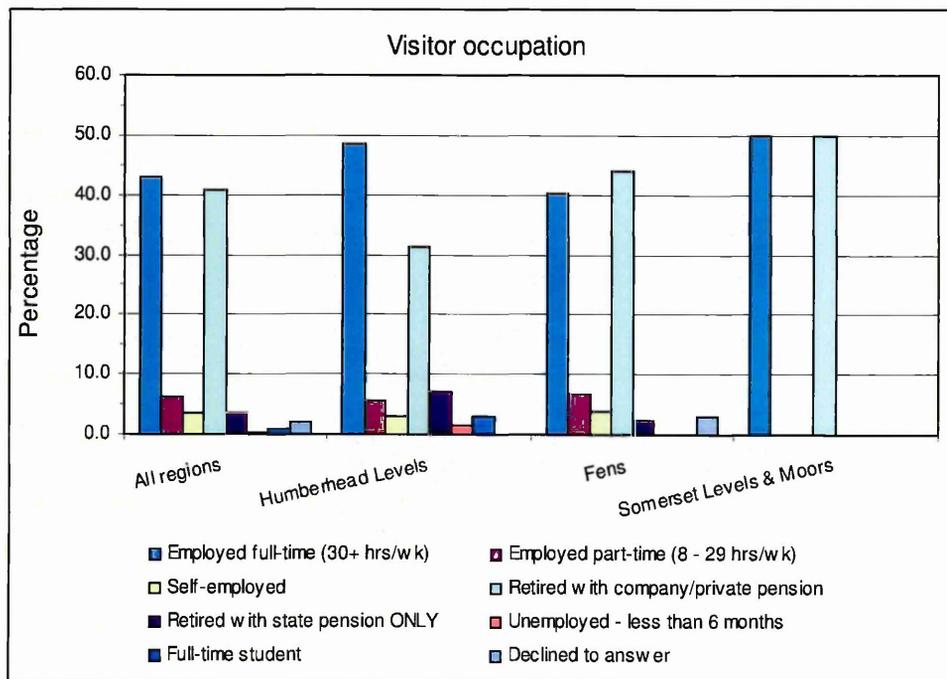
Graph 30: Visitor age ranges: all regions.

4.1.22.3. Visitor occupation.

The occupation of the main household income earner, along with income and postcodes, was asked for as a method understanding the social make-up of visitors to the study regions and associated attractions. Table 51 and Graph 31 detail the data obtained, and illustrate that the majority of visitors are either in full-time employment, at 42.7% for all regions, or retired with a company or private pension, at 40.8% for all regions.

| Occupation | Survey region | | | Total |
|--------------------------------------|-------------------|------------|-------------------------|------------|
| | Humberhead Levels | Fens | Somerset Levels & Moors | |
| Employed full-time (30+ hrs/wk) | 34 | 71 | 4 | 109 |
| Employed part-time (8 - 29 hrs/wk) | 4 | 12 | | 16 |
| Self-employed | 2 | 7 | | 9 |
| Retired with company/private pension | 22 | 78 | 4 | 104 |
| Retired with state pension ONLY | 5 | 4 | | 9 |
| Unemployed - less than 6 months | 1 | | | 1 |
| Full-time student | 2 | | | 2 |
| Declined to answer | | 5 | | 5 |
| <i>Total</i> | <i>70</i> | <i>177</i> | <i>8</i> | <i>255</i> |

Table 51: Occupation of main household income earner: frequency of responses.



Humberhead Levels: N = 70.
 Fens: N = 177.
 Somerset Levels & Moors: N = 8.
 Total: N = 255.

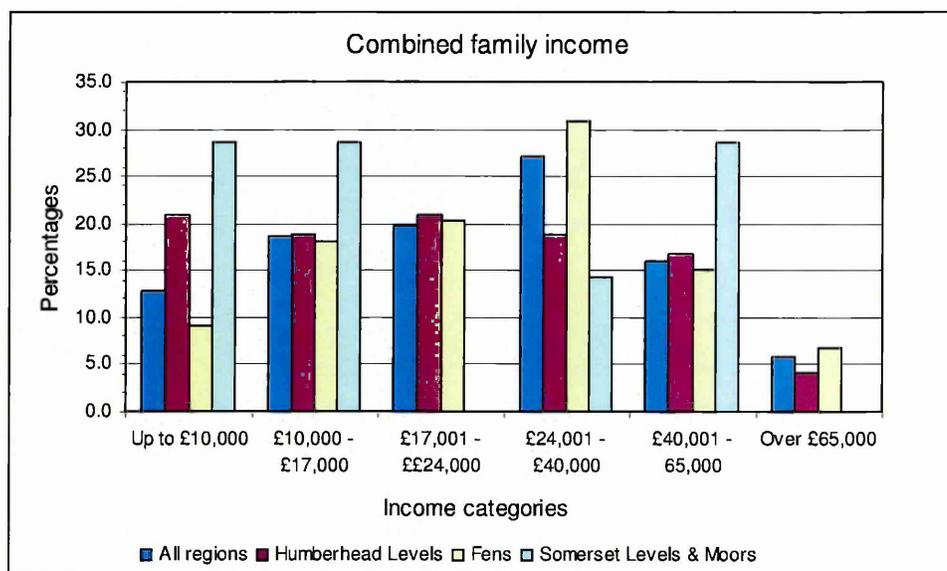
Graph 31: Occupation categories.

4.1.22.4. Combined family income of visitors.

Data on the combined family income of visitors was obtained through the use of income categories, and is detailed in Table 52 and Graph 32.

| Income categories | Survey region | | | Total |
|--------------------|-------------------|------|-------------------------|-------|
| | Humberhead Levels | Fens | Somerset Levels & Moors | |
| Up to £10,000 | 10 | 12 | 2 | 24 |
| £10,000 - £17,000 | 9 | 24 | 2 | 35 |
| £17,001 - ££24,000 | 10 | 27 | | 37 |
| £24,001 - £40,000 | 9 | 41 | 1 | 51 |
| £40,001 - 65,000 | 8 | 20 | 2 | 30 |
| Over £65,000 | 2 | 9 | | 11 |
| <i>Total</i> | 48 | 133 | 7 | 188 |

Table 52: Combined family income - frequency of responses.



Humberhead Levels: N = 48.
Fens: N = 133.
Somerset Levels & Moors: N = 7.
Total: N = 188.

Graph 32: Combined family income.

The data shows that, for the Humberhead Levels, household income levels are relatively evenly spread across the income categories, at between 16.7% and 20.8% for each category, excepting the 'over £65,000' at 4.2%. Limited Somerset Levels and Moors data indicates that household income is evenly spread across the categories for which it is available, excepting the '£24,000 - £40,000' category, which, at 14.3%, is half the proportionate value of other data for the same region. Fens data illustrates an increase in household income, from the lowest, 'up to £10,000' category, to a peak within the '£24,000 - £40,000' category, after which income levels decline. The data suggests that for the Humberhead Levels, and to some extent the Somerset Levels and Moors, proportionately more visitors on lower household incomes visit those regions than the Fens. However, within the '£24,000 - £40,000' category, it is Fen visitors who form the greater proportion of visitors.

4.1.23. Travel methods to case study regions and surveyed attractions.

As expected, the most popular method of travel to and within the study regions is by car. 89.2% of visitors arrive within the study regions by car, with 7.1% arriving by coach. For travel within study regions, 82.5% of visitors use their car to travel around, whilst 11.9% also engage in walking. Other, minor methods of travel within the study regions include bus (2.8%), coach (5.6%), rail (1.4%), canals or rivers (3.5%) and cycles (6.3%). Some visitors indicated that they use several of the travel methods detailed during their visit, but the majority use car transport.

4.1.24. Further comments provided by visitors.

Visitors were asked to make further comments regarding the study regions and attractions if they wished. Whilst many of the 114 comments received reiterate previous descriptive responses, with forty-one negative and forty-nine positive comments respectively, they provide further insight into visitor's perceptions and opinions of the study areas and are detailed in Table 114 (Appendix One).

4.1.25. 'Visitor interviews'; unsolicited and impromptu visitor observations.

During questionnaire distribution, numerous visitors proffered thoughts and comments on leisure and recreation within the study regions, many of which reiterate comments made previously. Comments of a more negative aspect numbered twenty-five, whilst comments with a positive angle totalled forty-eight. Comments with both negative and positive aspects numbered nine. Table 115, within Appendix One, details the more appropriate of these comments. It should be noted, however, that, unlike comments in previous tables, comments in Table 115 are not verbatim or transcripts of respondents own, questionnaire-sourced comments. Rather, these comments are sourced from notes made by the researcher at the time of questionnaire distribution.

4.1.26. Conclusion.

Through undertaking an analysis of the visitor data collected, an understanding of visitor demographics was obtained, as was an understanding of visitor perceptions, likes and dislikes with regard to the case study regions and associated landscape. With further information obtained on the value of wildlife and the importance of environmental factors as influences on visitor decisions to visit, the data collected illustrated aspects hitherto hinted at, and discussed within the literature review (Chapter two), but not fully understood. Thus the data revealed factors such as the value of the space, remoteness and wildness of the landscape, in conjunction the big skies and general rural atmosphere, as important and valued attractants for visitors. For many visitors a specific, often wildlife-based attraction was the primary reason for their visit, thus a mix of attractions within the case study regions was found to be less important. Nonetheless, a mix of attractions is noted as providing variety through which more general, non-specific visits can be encouraged.

With visitors identified as predominantly older, day-trip visitors both retired and in full-time employment, the data indicate a visitor market to be potentially targeted with respect to encouraging further visits. Whilst visitor spend is noted as comparatively low, nonetheless, the enthusiasm of visitors for wildlife and nature-based attractions, along with their noted loyalty through the propensity for repeat visits, suggests that visitors could be important as long-term economic contributors. This enthusiasm is further emphasised by the distances visitors travel within one day to visit nature-based attractions, at approximately 90 miles round trip. Furthermore, the high proportion of day visitors to overnight staying visitors questions the emphasis placed on overnight staying visitors as the key to overall economic contribution. This is discussed in the literature review (Chapter Two) and in Section Four of this chapter. With the data presented as above to generate visitor profiles, aspects of visitor perceptions of the case study regions and the importance of the environment and landscape generally, and wildlife attractions in particular, were considered. The data are discussed in the context of relevant literature in the following sections (4.2.0 to 4.4.0.).

4.2.0. Section Two: Landscape, visitor appreciation, and issues of policy.

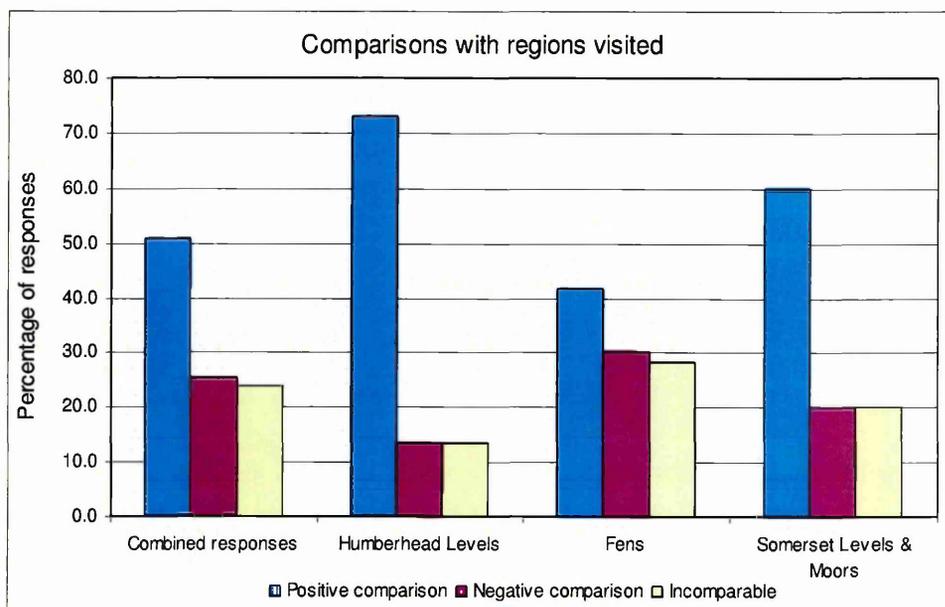
4.2.1. Introduction.

Inextricably linked to agricultural production and associated rural policies, the role of landscapes in attracting visitors to a region is important to rural tourism development. Although the landscape itself may not be the primary reason for a visit, it nonetheless forms the backdrop to leisure or recreational activities. This includes the journey to and from the destination. Studies undertaken by the National Trust illustrate the importance of an aesthetically pleasing, 'high quality' environment in attracting visitors to rural areas, and maintaining rural employment and economic viability (National Trust, 2005 and 2001). Predominantly concerned with more upland regions, nonetheless, it is the aesthetically pleasing 'high quality' aspect of the environment noted by the National Trust that is important. This has resonance for current research. Managed appropriately, there is little reason to prevent wet, lowland landscapes being aesthetically 'high quality' and attractive to visitors.

Whilst individuals will have their own ideas of aesthetically pleasing landscapes, society as a whole tends to regard some landscapes above others. This is detailed in the literature review, section 2.5.0. A consequence is that some regions receive many visitors, others few. Much of this can be ascribed to ease of access, availability of tourism related facilities, and efficient marketing, but not all. Some landscapes seem forever out of favour with society. In particular, with some exceptions (e.g. the Norfolk Broads), flat and low-lying landscapes receive little visitor attention. The opinion of society with respect to landscape preferences does change over time. This provides an opportunity to encourage tourism in regions considered less popular. Thus an understanding of why some landscape types are preferred over others will better inform visitor development proposals. It may offer an increased chance of success in developing visitor attractions. As such and informed by a review of literature, an understanding of preferences for landscape types in respect of the case study regions is important to the research.

4.2.2. Level landscapes and wetlands in the research context.

Whilst the perceived wisdom suggests that flat, level and wet landscapes are unattractive, having little to offer visitors, as detailed in section 2.5.0., the research demonstrates that this is not a full and complete picture. Although there are some negative perceptions and opinions of the Fens, Humberhead Levels and Somerset Levels and Moors, positive comments by visitors predominate, (at a ratio of 3.6:1). This positive response is further demonstrated with the use of a Likert Scale (scaling 1 = low, 5 = high) to assess visitors opinions of the study regions as visitor destinations. Seventy-seven percent of visitors rated the study regions 3 or above (Graph 22 and Table 39). Illustrated still further through visitor comparisons with other regions visited, 50% indicated a positive comparison, the study regions comparing well with other, more established visitor destinations such as the Peak and Lake Districts, Scotland, Cornwall, Yorkshire and Norfolk. Although 25% of visitor responses were negative, a further 24% of visitors declined to compare the study regions with other areas. This was on the basis that each region was unique, and incomparable, Graph 33. If such 'incomparable' responses are discounted, the study regions clearly receive a favourable rating amongst visitors by a factor of 2:1. Table 53 and Table 54 detail a selection of both positive and negative comments received, and likes and dislikes regarding the study regions.



Combined regions: N = 138.
Humberhead Levels: N = 37.
Fens: N = 96.
Somerset Levels & Moors: N = 5.

Graph 33: Comparisons of study regions with other regions visited.

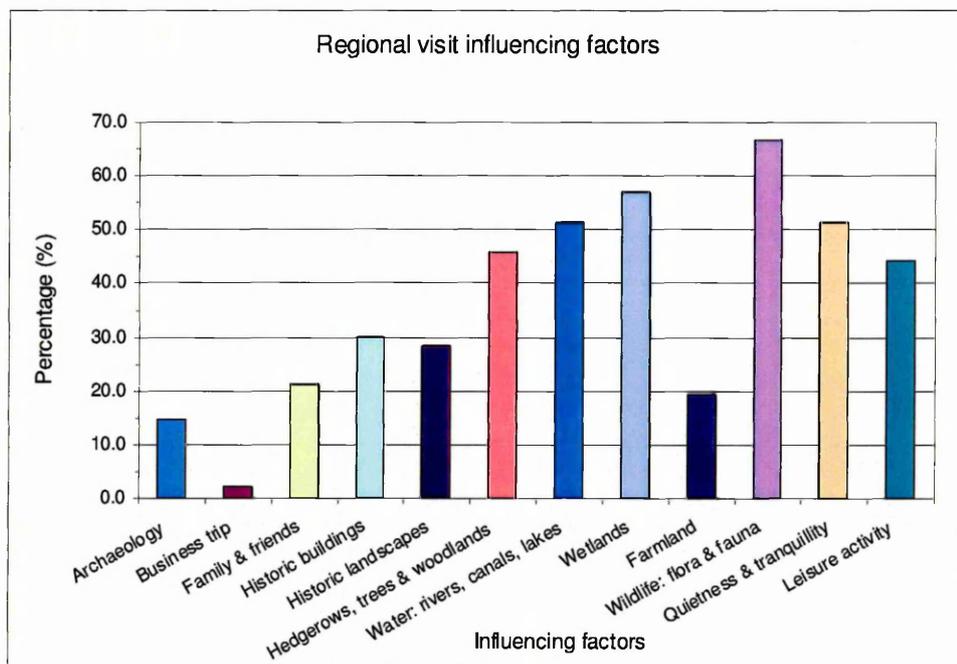
| Region | Positive responses | Negative responses |
|-------------------------|--|---|
| Humberhead Levels | More attractive than I expected It's prettier than I expected Love it Very interesting A great deal of places to visit with easy access Much more interesting than I thought it would be Very interested....a very rich.....heritage Worth more exploration | Don't know the boundary of the Humberhead Levels Appear to be underdeveloped Managed landscape....spoilt by poor quality....buildings....an unkempt appearance |
| Fens | Loved the openness & big skies Have always loved the peace, tranquillity & historic interest A unique habitat Fantastic landscape - fantastic quality of light Great landscape Fens are always full of wonderment Beauty of the landscape is unique Love open spaces & skies - fewer people & rush Peaceful I shall certainly be back | Flat & uniform. Hard to pick out any memorable sites Generally not attractive Expected to be flat & boring Nothing to do or see Poor part of the country, nothing going on Intensively farmed mono-culture Flat & bleak |
| Somerset Levels & Moors | Quiet, friendly region Scenery & solitude far better than expected Unspoiled as ever | <i>No negative responses for the Somerset Levels & Moors</i> |

Table 53: Selected positive and negative responses regarding study regions.

| Region | Visitor response |
|-------------------------|---|
| Humberhead Levels | Liked the Moors in particular because of the scenery and possibility of seeing birds, wildlife & flora It's a quiet, pretty area Don't like Google. Like wildlife & landscape Too flat for me, but good for cycling. Rivers get in the way of direct routes. Not too crowded. Nice & peaceful Sense of space |
| Fens | What it lacks in the way of hills, cliffs etc., it make up with water, rivers etc. The flatness of the land is a little boring...but have yet to discover the probable good side Lack of variety in the landscape Wonderful open skies of fenland We love the peace & quiet, the great open spaces The landscape/wildlife wonderful - highest quality Flatness can be monotonous I like the light and sense of space A powerful, unique beauty The flatness and general bleakness of the area do not encourage me to visit Flatness - great panoramic views, big sky Likes: wetlands & associated wildlife, wide skylscapes Scale of the untamed area |
| Somerset Levels & Moors | The views are stunning Roads are very uneven The beauty & freedom of many walks available Like the rural scenery & cycle tracks |

Table 54: Selected examples of visitor likes and dislikes within the study regions.

Within the context of 'landscape' are several individual factors identified as potential influences on decisions to visit the study regions. The importance of these factors to visitors is illustrated in Graph 34.



N = 218.

Graph 34: Influencing factors on decisions to visit study regions.

It can be seen from the graph that flora and fauna are considered important factors. In conjunction with this and other wildlife and wetland-based studies (Rayment *et al.*, 2000; PACEC, 2004), landscape-related factors such as wetlands, peace and tranquillity, water features, trees and woodlands are all rated as important. Similar factors are noted by Downward and Lumsdon (2003), Table 55, as reasons to visit Herefordshire. In association with these factors, leisure activities undertaken in the study regions also rate comparatively highly, at 44% of responses. By contrast, farmland, upon which much of the UK countryside is based and upon which much visitor and tourism trade depends, rates poorly, at 19% of responses.

| Important destination factors | Not important (%) | Indifferent (%) | Important (%) |
|-------------------------------|-------------------|-----------------|---------------|
| Scenery/landscape | 2.0 | 7.7 | 92.2 |
| Nature/wildlife | 12.0 | 24.1 | 63.9 |
| Relaxation/peace/quiet | 1.9 | 4.6 | 93.5 |
| Exercise/fresh air | 6.3 | 15.9 | 83.7 |
| Away from traffic/cities | 7.7 | 10.7 | 81.7 |

Adapted from Downward and Lumsdon (2003, p.73).

Table 55: Selected reasons for visiting Herefordshire.

As noted by Kaltenborn and Bjerke, (2002), landscapes predominated by open, regulated, flat fields, interspersed with buildings in poor repair, are regularly presented as unattractive landscapes and scenery. Such landscapes predominate within the Humberhead Levels and the Fens, and thus it is not surprising that 'farmland' rates

poorly compared to other landscape factors detailed in Graph 34. This is also noted by Strumse (1996, p.21) with respect to '*modern farming elements*' within landscapes. Further to this, Kaltenborn and Bjerke (2002) note that older landscapes with cultural aspects, even though modified by anthropogenic activity, are preferred over more modern agricultural landscapes. This again corresponds with the dislike of modern, intensive agricultural methods predominant within the Humberhead Levels and the Fens (illustrated in Graph 34). However, Graph 34 and descriptive visitor comments on their likes and dislikes within the study regions (Table 54), demonstrate that visitors like the wider landscapes of the Humberhead Levels and the Fens, but not the intensively managed farmland within them.

4.2.3. Visitor landscape likes and dislikes; a conundrum.

If flat, regulated, modern and intensively farmed landscapes (i.e. those landscape with a "*dominating human influence*" (Strumse, 1996, p28)) are unattractive to visitors, and yet the research shows visitors surveyed like the landscape, then why is there this discrepancy? Negative aspects of the Humberhead Levels and the Fens, as noted by visitors, include the flatness and monotonous agricultural landscape. Other factors linked to the same farmed landscape are given as positive aspects, namely the big skies, open vistas, remoteness, wildness, nature and even lovely scenery. Yet, without farming developing and maintaining the landscape as it is (Strumse, 1996), many of the positive aspects noted by visitors would disappear or be altered. The discrepancy between the like of open, 'wild' landscape and the dislike of the farmed landscape appears to settle on perception. What visitors see and experience, rather than what they are actually standing in (an intensively farmed landscape), appears to be the key.

Given that visitors regularly give the big skies, openness and views as positive aspects of the study regions, then it seems that visitor preferences are a factor of landscape management, namely farming. With few trees and even fewer hills, the landscapes of the Humberhead Levels and the Fens allow long, uninterrupted views. This engenders a remoteness within the landscape so that the intensively managed landscape may seem 'wild'. The landscape of the Somerset Levels and Moors, surrounded by hills on three sides, contains a more immediate horizon. This presents a different form of flat landscape (*Survey data*). More trees, less intensive and more traditional farming

methods, and the surrounding hills, limit views and the comparative openness of the Somerset Levels and Moors landscape, giving a more intimate landscape, unlike the bleak openness of the Humberhead Levels and the Fens (Photographs 1 to 9, and Photograph 12).

Whilst intensive farming methods predominate in the Humberhead Levels and the Fens, and are generally disliked, without them it is possible that the landscape would differ, with the openness and big sky vistas replaced by a more closed landscape of reeds, hedges and trees. Whilst this may be preferable with respect to wildlife and subjective aesthetics through increasing the visual complexity of the landscape and overall public desirability, without the open vistas, the public preference for a landscape can fall (Strumse, 1994a and 1994b). Although creating a more ecologically diverse landscape could benefit flora and fauna, an overly diverse and visually complex landscape could present an incoherent and discordant landscape image to visitors. This might lessen visual aesthetics and visitor experience quality (Clay and Daniel, 2000). Such a change could precipitate a decline or stagnation in visitor demand. Strumse (1994a) notes that, with respect to landscapes with nature elements, characteristics such as smoothness-uniformity, openness and landscape coherence are important in establishing preferences. Where these elements are lacking, landscape preferences can decrease, as they do with an excess of anthropogenic influences such as modern buildings and farming methods, and a consequential lack of natural influences within landscapes (Kaltenborn and Bjerke, 2002; Strumse, 1994b). Studies indicate that preferred landscapes contain a mixture of natural, or perceived natural, and anthropogenic aspects, such as roads, walls and bridges, with "*naturalness regarded as a particularly powerful factor in preferences*" (Strumse, 1994b; Purcell and Lamb, 1998, p58).

Although a highly manicured landscape, with limited 'naturalness', the research results indicate a liking for the fenland landscape due to its open, 'wild' nature, big skies and associated remoteness. The lack of hills allows un-interrupted views, and rarely does the sky take precedence as it does in flat landscapes. Due to the sparse population and limited urbanisation within the Humberhead Levels and the Fens, the landscape can give the appearance of being untamed and wild, particularly in conjunction with inclement weather. The absence of people and traffic, although never far away, can give the impression of being in a remote, isolated landscape. This is an aspect which many visitors enjoy. The lack of visual references on horizons, and thus the inability to

determine one's location within the landscape, further imparts a feeling of remoteness and isolation. Remoteness, note Beatty and Beatty (1976, p.61), "*can foster a pleasant sense of seclusion and intimacy*". Furthermore, such remoteness imparts an element of mystery to the landscape, further engendering a positive landscape preference (Strumse, 1994a). It also kindles feelings of tranquillity, peace and quietness, aspects which feature regularly in visitor's descriptive comments. The importance of these is illustrated in Graph 34, above. Kaltenborn and Bjerke, (2002) note that in Southern Norway, wild and pristine landscapes score highly in individual's landscape preferences, particularly when containing water. Although the fenland landscape cannot be compared in wildness terms with Southern Norway, nonetheless, the 'wild' aspect of a landscape is subjective. It is dependant on an individual's view of the world and the availability of 'wild' landscapes within that country. Thus 'wild' is subjective to a UK, fenland context. In this respect, the remoteness and uncomplicated 'smooth' landscape (Strumse, 1994a), with the atmospheric 'big sky' of the sparse Humberhead Levels and Fens landscape, offers a perceived wilderness in an area of the UK increasingly urbanised on its fringes. Stedman (2003), in discussing the Humberhead Levels, notes the importance of openness and isolation:

"To some observers the landscapes typified by the Trent and Ouse lowlands are bleak, remote and uninspiring; to others they are expansive, isolated and uplifting. Regardless of personal interpretation the openness and sense of isolation are key constituents of the landscape."

Countryside Commission, 1995, in Stedman, 2003, p.8.

Similarly, de Groot and van den Born (2003, p.138), with respect to the flat landscapes of the Netherlands, suggest that:

"the great lakes and big skies are our landscapes of 'greatness and forces of nature'. The river floodplains..... our potential wilderness of 'untamed and interactive nature'".

With an increasing desire to "*reconnect*" with nature (Orams, 2002, p.286), the landscapes of the Humberhead Levels and the Fens allow this as Groot and van den Born (2003) indicate.

4.2.3.1. Tranquillity.

With reference to Graph 34, and the importance of factors such as quietness, remoteness, isolation and tranquillity, it is necessary to understand how such factors are important to visitors. Whilst quietness, remoteness and isolation are more obvious, 'tranquillity' in a landscape context and in the context of the research is less clear. It is noted as an alternative description to words such as serene, peaceful, restful, and still, in dictionaries and thesauruses (Chambers, 1995). Studies for the Countryside Agency (2005a), and the Campaign to Protect Rural England (CPRE, 2005) provide meanings of tranquillity in a landscape context defined through consultation of the general public. Table 56 details positive and negative factors associated with public perception and understanding of tranquillity in the Countryside Agency and CPRE studies.

| Positive factors | Negative factors |
|--|---|
| Openness of the landscape Perceived naturalness of the landscape Rivers in the landscape Areas of low noise | Presence of other people Visibility of roads General signs of overt human impact Visibility of urban development Road, train and urban area noise |

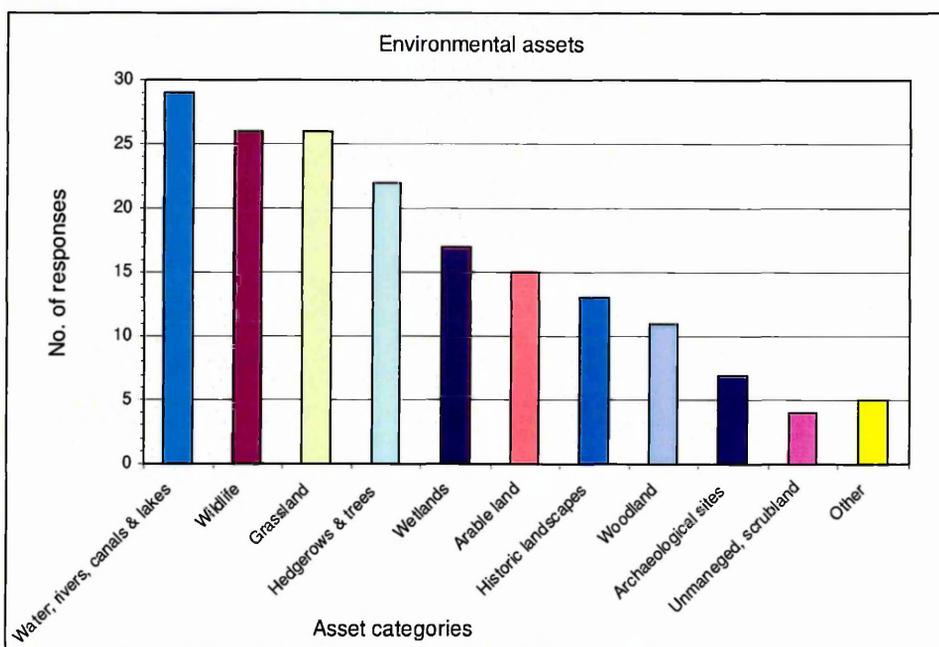
Adapted from CPRE, 2005, p.6.

Table 56: Positive and negative factors associated with 'tranquillity'.

Highlighted within the CPRE (2005) report is the importance of wildlife and of being within a perceived or actual natural landscape, as components of tranquillity. This is in conjunction with remoteness, solitude, peace and quiet. Furthermore, activities such as walking contributed to feelings of tranquillity, with associated benefits of emotional and personal wellbeing. Not only do the factors detailed in Table 56 concur with landscape preference findings detailed by Strumse, (1994 a & 1994b), Purcell and Lamb, (1998), Kaltenborn and Bjerke, (2002), and Stedman (2003), the factors also concur with positive responses from this study's data gathering. 'Tranquillity', as presented by the Countryside Agency (2005a) and CPRE (2005), defines aspects of the fen landscape that are of great importance and value to visitors as found in the current study. CPRE (2005, p.12) note that "*tranquillity is seen as an asset.....something that should be preserved and enhanced*".

4.2.4. The importance of landscape as a visitor attractant.

Whilst it is taken for granted that an attractive landscape appeals to visitors, (noted as such by the Tourism Associates (1999), PWC (2004), and the National Trust (2001 and 2005)), this research highlights the use of landscape and wildlife by recreation businesses as factors in attracting visitors. This may seem obvious, but nonetheless has implications for policy and land management, particularly in relation to the apparently 'less' attractive fen landscape. Graph 34 and associated text highlights factors important to visitors, and questions the 'unattractiveness' of the fen landscape. Graph 35 details environmental assets offered by recreation businesses which they consider to be important to their operations. Further to this, Table 57 details 'selling points' used by recreation businesses in advertising their businesses. The higher ratings achieved for countryside and the rural landscape, and wildlife and nature, suggest that such factors are important as they are. Although differing land management could improve such ratings, equally, inappropriate land management could decrease their attractiveness and thus importance to visitors and recreational businesses, with consequences for visitor income generation.



Graph 35: Environmental assets offered as a factor in recreational business existence and operation.

| Descriptor category | Visitor attraction | Region |
|---|--------------------|--------|
| | Count | Count |
| <i>Activity (walking, cycling, equine etc. excluding boating/fishing)</i> | 3 | 6 |
| <i>Countryside/rural/landscape</i> | 18 | 6 |
| <i>Culture/historic/archaeological</i> | 8 | 9 |
| <i>Facilities/amenities/neighbouring areas/cities/towns</i> | 7 | 7 |
| <i>Farm-related</i> | 6 | 0 |
| <i>Local produce</i> | 4 | 2 |
| <i>Peace/tranquillity/quiet</i> | 14 | 1 |
| <i>Water/boats/fishing</i> | 7 | 6 |
| <i>Wildlife/nature</i> | 6 | 11 |

Each category count recorded once only per questionnaire response to indicate principle factors.

Visitor attraction responses: N = 48.

Regional responses: N = 35.

Table 57: Categories of factors used by recreational businesses in advertising visitor attractions and the case-study regions.

4.2.5. Landscape and brief implications for policy.

The perceived and actual landscapes have a bearing on policy decisions. As discussed in greater detail along with policy influences in sections 2.5.0. and 2.6.0., Kaltenborn and Bjerke, (2002) note that an individual's cultural and demographic standing and interests influence their view of landscapes. As expected, those within the farming community rate landscape types differently from visitors. Similarly, individuals with an interest in conservation elicit eco-centric preferences associated with wildlife conservation and cultural landscapes. Factors such as age, gender, knowledge and area of residence, urban or rural, have also been noted to affect an individual's preferences for landscape types, as has familiarity of the landscape (Strumse, 1996). In attracting visitors, there is an argument for raising the profile of a region through media exposure, as noted within section 2.5.1.4., thereby increasing the public's familiarity of the region, and understanding the potential visitor market.

However, visitors are not the only stakeholders in landscape management. Resulting from multiple uses over many years, landscapes affect more than a single individual or stakeholder group. Impacts may be unconstrained by individual ownership or artificial curtilage. An attractive landscape is a considerable asset to local economies, as noted by the National Trust (2001), more so if it is productive, and can provide sources of employment and income generation through a variety of guises. These may include agriculture, tourism, visitor leisure and recreation, and the attraction of development investment, both commercial and residential (Clay and Daniel, 2000; Rotherham *et al.*,

2002a; Antrop, 2005). Thus, in decisions regarding landscape and associated agricultural policy, it is important that the requirements of differing user groups are noted (Strumse, 1996; Kaltenborn and Bjerke, 2002), and that a coherent, "*shared management responsibility*" (Clay and Daniel, 2000, p.2) is developed by policy makers. Not only is this important with respect to different user groups living and working within the landscape, but also to maintain a "*continuity of experience*" for those visiting and travelling through the landscape (*ibid.*, p.2).

4.2.6. Conclusion.

With issues of visitor perception discussed in the Literature Review (Chapter Two), the findings noted above, with the results presented in Section One of this chapter, demonstrate a likening for fenland landscapes. This is for the case study regions, and highlights the importance of the wider landscape as a general visitor attraction. However, clearly identified is the conundrum of an appreciation for wide, open, tranquil landscapes and the associated 'big sky' aspect, and a general dislike of the intensive agricultural processes that predominate such flat, productive landscapes. The implications for policy and continued agricultural production in the case study regions, and potential increased and diversified economy supported by a visitor market, are clear. Concurrent support and maintenance of the landscape are required to ensure agricultural production and a visitor market exist without detriment to each other. In conjunction with agricultural support through subsidies and agri-environment schemes, the support of policy initiatives to establish a visitor market and an environment supportive of nature-based and wildlife attractions are considered important. This is a key aspect of the research findings, and is discussed further in Chapter Six.

4.3.0. Section Three: Visitor profile.

4.3.1. Introduction.

Along with an understanding of visitor perceptions of landscape, an understanding of visitor profiles is necessary. This is important for individual businesses and with respect to overall potential visitors within the case study regions. This can inform the marketing for visitors and policy decisions to encourage a visitor market. With an understanding of visitor profiles, appropriate visitor facilities and attractions could be encouraged to match visitor profiles. Other, more wide-ranging attractions could be developed later in line with demand. So understanding visitor profiles is important to the research. By this, identified visitor profiles can be compared with similar studies (Mills *et al.*, 2000; Rayment *et al.*, 2000; PACEC, 2004), and also the GB Leisure Day Visits Survey (Anon., 2004). This allows comparison and research triangulation as befits the pragmatic, multiple methods approach of this research (Bryman, 2001; Saunders *et al.*, 2003). Furthermore, in conducting a visitor survey and making comparisons with previous studies, data gained will enable any differences between the surveyed visitor profile and visitor profiles in other studies to be ascertained. Such differences, if great, could impact on visitor marketing and policy decisions within the case study regions.

4.3.2. Visitor demographics and visitor party make-up.

Data obtained through the visitor survey indicate that visitors to the study regions are generally older, within the 45 - 65+ age groups, and either employed or retired. Those neither in employment nor retired, and those declining to provide information, accounted for 3.1% of respondents. Visitors aged between eleven and thirty-four are poorly represented within the findings, as illustrated in Graph 30. With respect to age, the identified visitor profile corresponds with that perceived by recreation businesses surveyed, Graph 62.

As with nature-orientated visitors generally (Anon., 1999a), such age-related figures and observations concur with similar studies into visitor attractions and regions associated with rural areas, wildlife and or wet, low lying landscapes. These include the

Fens and Somerset Levels and Moors (Mills *et al.*, 2000; Rayment *et al.*, 2000; Downward and Lumsdon, 2003; PACEC, 2004; Rotherham *et al.*, 2005b), with allowances for differences in survey age range categories. Furthermore, PACEC note other studies of wildlife and wetland-related attractions, and observes that visitor demographics within these studies compares with PACEC's own, 2004 findings. The current research visitor survey and Rayment *et al.* (2000) noted an almost equal split between male and female visitors, as did PACEC (2004) with respect to Wicken Fen. However, in surveying potential visitors with a more specialist interest in flora and fauna, via post, PACEC noted a 67% - 33% split between males and females. Whether this difference is due to more specialist visitors tending to be male, or to who completes such survey questionnaires within a household, i.e. the stereo-typical male head of the household, is unknown. Generally, differences in attitudes towards nature between males and females is considered negligible (de Groot and van den Born, 2003), and concurs with visitor gender proportions noted by the research findings and Rayment *et al.* (2000).

4.3.2.1. Visitor party size.

Calculated using an SPSS data analysis programme, the mean party size of visitors surveyed was 2.65 per party, including 0.37 children³ per party. Such values compare with Rayment *et al.* (2000) who recorded 2.9 visitors per party, including 0.6 children per party, and the GB Day Visits Survey at 2.8 visitors per party (Anon., 2004). The greater values for the party size including children noted by Rayment *et al.* (2000) may be a result of that study being conducted on the Norfolk coast, and therefore a holiday destination with a greater number of children present within family parties. Excluding children, Rayment *et al.* found 2.3 adults per party, compared to the 2.28 identified during the current research, and 2.5 noted by the GB Day Visits Survey (Anon., 2004). As Graph 30 details, at 13.7% of visitors, children comprise a small proportion of overall visitor numbers. A similar proportion of child visitors is noted by Downward and Lumsdon, (2003), with a slightly higher proportion, 18%, given by the GB Day Visits Survey (Anon., 2004).

³Children defined as being 15 or younger (Rayment *et al.*, 2000; Anon., 2004. Downward and Lumsdon (2003) unspecified).

4.3.2.2. Visitor party size: adjustment for data irregularities.

Within the mean party size of 2.65 data is a coach party of thirty-nine visiting RSPB Ouse Washes. This was the only coach party encountered during data collection. Whilst important in terms of visitor numbers, the coach party is an aberration with respect to the remaining data collected. The next highest party number is ten. Thus the data 'spike' caused by the party of thirty-nine raises the mean number of visitors per party in an uncharacteristic manner. By not including the coach party within the mean party size analysis, the mean number of visitors falls to 2.51 per party. The proportions of children remain unchanged, whilst not including children reduces the mean adult party size to 2.14. Further analysis suggested that omission of associated coach data did not affect overall findings. So to present a representative mean value of visitors per party, a figure of 2.51 visitors will be used for analysis and comparisons.

The figure of 2.51 is given further credence when the number of visitors is calculated simply by dividing the number of returned survey questionnaires with the number of visitors detailed. Of the 278 useable questionnaires returned, 250 included details of visitor party numbers and make-up. With 670 visitors accounted for within these 250 questionnaires, this equated to 2.68 visitors per questionnaire. Assuming one visitor for each of the twenty-eight questionnaires that did not provide details of visitor party numbers, the revised figure of 698 visitors equates to 2.51 visitors per questionnaire.

4.3.3. Visitor party size and length of stay.

Overall, of a sample size of 251, 50.2% of parties comprise of two people, with 66.9% of visitor parties comprising of individuals or couples. Only 6.8% of parties comprise of five or more visitors. This proportion of visitor parties comprising of one or two people is also noted by PACEC (2004, p.147) with respect to RSPB Titchwell Marsh and Wicken Fen, where 70% and "the majority" respectively were individuals or couples, and in Rotherham *et al.* (2005b), where 64% of RSPB Old Moor visitor parties comprised one or two people. Table 58 details the proportions of day-trip and overnight staying visitors by party size.

| Number in party | Length of stay & number of parties | | | | Total | |
|-----------------|------------------------------------|-------|----------------|-------|-------|-------|
| | Up to one day | | Overnight stay | | | |
| 1 | 30 | 16.9% | 9 | 13.8% | 39 | 16.1% |
| 2 | 84 | 47.5% | 39 | 60.0% | 123 | 50.8% |
| 3 | 20 | 11.3% | 7 | 10.8% | 27 | 11.6% |
| 4 | 31 | 17.5% | 5 | 7.7% | 36 | 14.9% |
| 5 | 5 | 2.8% | 2 | 3.1% | 7 | 2.9% |
| 6 | 4 | 2.3% | 2 | 3.1% | 6 | 2.5% |
| 7 | 0 | 0 | 0 | 0 | 0 | 0 |
| 8 | 1 | 0.6% | 0 | 0 | 1 | 0.4% |
| 9 | 1 | 0.6% | 0 | 0 | 1 | 0.4% |
| 10 | 0 | 0 | 1 | 1.5% | 1 | 0.4% |
| 39 | 1 | 0.6% | 0 | 0 | 1 | 0.4% |
| Total | 177 | | 65 | | 242* | |

*Sample number less than 251 due to lower response rate of party size & length of stay data.

Table 58: Visitor party size by day-trip and overnight visit.

4.3.4. Visit duration: day visits.

The visitor survey indicated that 75% of visitors stayed for up to one day at targeted attractions within the study regions. Similar proportions of day-visitors have been noted by Mills *et al.* (2000) with respect to visitors to the Somerset Levels and Moors, whilst Rotherham *et al.* (2005b) note that 97.2% of visitors to RSPB Dearne Valley are day-visitors. Within visits of up to one day within the study regions, the mean and median length of stay was 3.5 and three hours respectively, with the most frequent length of stay, or mode, being four hours. Clearly, the length of stay within a study region may be more than the stay at an individual attraction. This potential for visitors to visit other attractions within the same day is indicated by Rayment *et al.* (2000) and Mills *et al.* (2000), particularly in association to those visitors staying elsewhere, e.g. on the Somerset or Norfolk coasts and driving into the study areas for the day. As a comparison to visit duration identified by the research, visitors to Wicken Fen generally stay for up to three hours, and travel from home to Wicken (PACEC, 2004). At this visit duration, visit length at Wicken Fen is the second shortest within the Eastern Cambridge region, whilst, in 1999, Wicken Fen was second only to Ely Cathedral as the most visited site in East Cambridgeshire.

The GB Day Visits Survey (Anon., 2004) defines tourism leisure day visits as those visits lasting three hours and over, and outside a visitor's usual environment. It notes that on average, visitors on tourism leisure day-trips spend around 3.5 hours at their visit destination. By comparison, leisure day visits lasted on average 2.3 hours, with

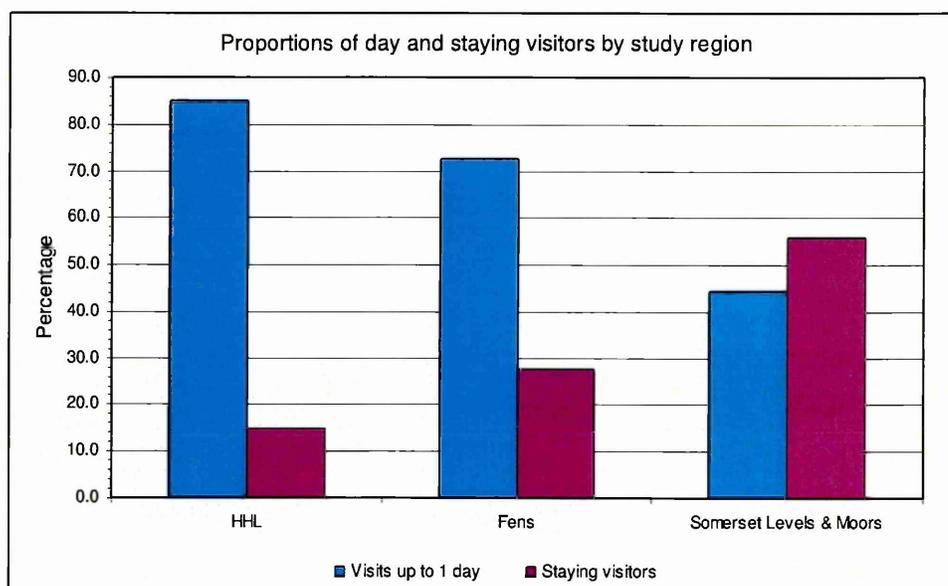
34% of leisure day visits lasting less than one hour. Thus, the average⁴ length of tourism-related visits noted by the GB Day Visits Survey, and identified by this research and PACEC (2004) at an average of 3.5 hours and three hours respectively, places the visits within the territories of 'tourism'. Whilst there is a caveat regarding visits made on a regular basis within this definition, within the tourism literature are further limitations of 'tourism' based around distances travelled and whether or not an overnight stay is included (den Hoedt, 1994, in Smith, 1995; WTO, 2002). Such restrictions have implications for assessing the economic impacts of visitor spend, and are discussed further in section 2.3.0., with definitions discussed in greater detail in section 2.2.0.

4.3.5. Visit duration: weekend, short break and longer.

With visits comprising 75% day visits, the remaining 25% of visits are for over one day. Within this, 13.8% comprise weekend-short break visits, i.e. stays of up to three nights, with 11.2% being visits of four nights or longer. As with day visits, identified proportions of staying visitors are similar to those within Somerset, although within differing regions of Somerset there is some variation, from 38% to 13% of staying visitors. Somerset as a whole receives 26% staying visitors, (Mills *et al.*, 2000). Staying visitors to north Norfolk, however, comprise around 52% of visitors (Rayment *et al.*, 2000), possibly as a reflection of the higher proportion of staying, holidaying visitors on the Norfolk coast, a factor noted by PACEC (2004) as affecting visitor make-up proportions at attractions. Clearly, with accommodation spend included in daily visitor spend, the economic benefits of staying visitors per visitor is greatly enhanced over day-visitors. However, overnight stays do not necessarily equate to accommodation spend. Data collated for this study revealed that 40.7% of staying visitors stay with family or friends, whilst PACEC (2004) noted that 33% of staying visitors stay with family and friends. Although PACEC also noted that visitors showed family and friends around Wicken Fen, thus increasing daily visitor spend, the accommodation spend 'lost' through visitors staying with family and friends impacts on potential accommodation spend, and lessens related benefits. In many respects, therefore, staying visitors who lodge with family and friends take on the characteristics of day-visitors, and their spend should be accounted for accordingly.

⁴ Although not verified, it is assumed that the 'average' values referred to in the GB Day Visit Survey, PACEC (2004), GBA (2005) and similar reports equates to the mean value, and is treated as such.

Whilst the data revealed similar proportions of weekend-short break and stays of four nights and longer for all three study regions combined, Graph 8, regionally, there is a greater proportion of staying visitors within the Fens and Somerset Levels and Moors, at 27.6% and 55.6% respectively, compared to 14.9% within the Humberhead Levels, Graph 36. A proportionately greater division in the number of nights stayed is also observed, Table 59. All overnight stays within the Somerset Levels and Moors are for between four and seven nights. Within the Fens, weekend-short break and four nights and over stays comprise 16.2% and 11.4% of all visits respectively. Within these, 17.2% of visitors stayed between four and seven nights, with 6.9% staying over fourteen nights. Stays of up to three nights predominate at 75.9%. Within the Humberhead Levels, those who stayed up to three nights, between four and seven nights, and eight to fourteen nights are evenly distributed at 33.3% each, with no visitors staying over fourteen nights. In considering the aforementioned, the limited data sets should be noted.



HHL: N = 74.

Fens: N = 185.

Somerset Levels & Moors: N = 9.

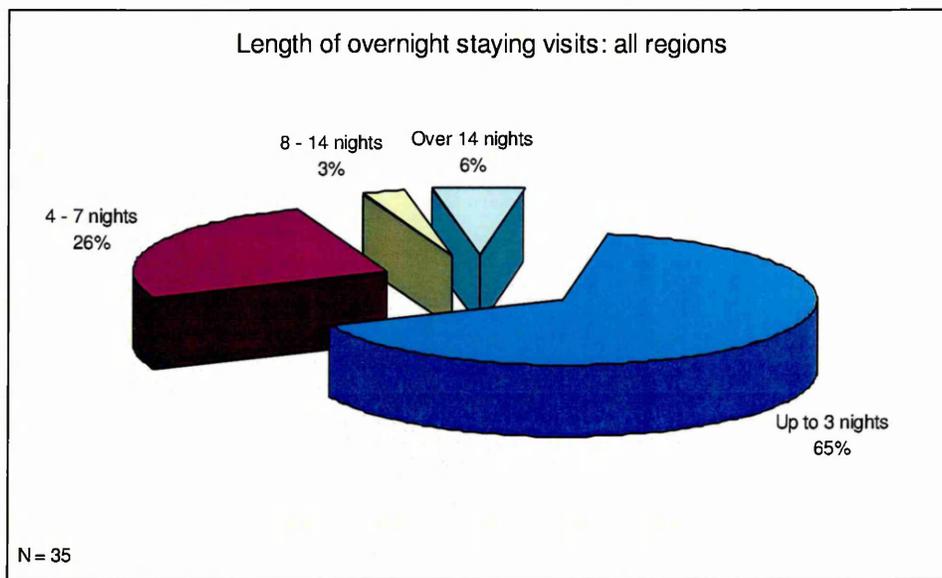
Graph 36; Proportions of day and staying visits by study region.

| Number of nights stayed | Region | | | | | | Combined Total | |
|-------------------------|-------------------|-------------|-----------|-------------|-------------------------|-------------|----------------|-------------|
| | Humberhead Levels | | Fens | | Somerset Levels & Moors | | | |
| Up to 3 | 1 | 33.3% | 22 | 75.9% | | | 23 | 65.7% |
| 4 - 7 nights | 1 | 33.3% | 5 | 17.2% | 3 | 100% | 9 | 25.7% |
| 8 - 14 nights | 1 | 33.3% | | | | | 1 | 2.9% |
| Over 14 nights | | | 2 | 6.9% | | | 2 | 5.7% |
| Total number | 3 | 100% | 29 | 100% | 3 | 100% | 35 | 100% |

Limited data samples should be noted.

Table 59: Number and proportions of nights stayed by region.

The data illustrated by Graph 37 and Table 59, illustrating as they do the propensity for stays of up to three nights, are, overall, contrary to findings by Rayment *et al.* (2000), and the Tourism Associates (1999) as adopted by Mills *et al.* (2000). Such reports give the average number of nights stayed as 6.2 and 7.24, and the length of stay as seven days respectively. It should be noted, however, that findings by the Tourism Associates (1999) and adopted by Mills *et al.* (2000) do concur with the study findings relative to Somerset and the wider south-west, i.e. seven nights is the predominant length of stay, albeit on a small sample number. The findings also concur with Rayment *et al.*'s (2000) observation on the growth of short-break holidays, which accounted for over 50% of all UK holidays and one third of holiday expenditure in 1998. Such growth, Rayment *et al.* suggested, is expected to continue, as is noted by Continuum (2004) and demonstrated by YTB (2004): short, 1-3 night breaks comprise half of all holiday spend within the UK. As if in echo of these observations, GBA (2005) note the average tourism trip length within Lincolnshire to be 3.61 days, and thus similar to the predominant length of overnight staying visits identified within this current research, Graph 37 and Table 59.



Graph 37: Proportions and lengths of overnight staying visits .

The causes of the differences in proportions of day and staying visitors, and the length of overnight stays within the study regions and in Norfolk, will vary. Mills *et al.* (2000), Rayment *et al.* (2000) and PACEC (2004) observe that staying, holiday visitors to popular tourist destinations undertake day-trips to the study areas and wildlife and wetland attractions, and thus account for a proportion of visitors visiting attractions for less than one day. Further to the lack of overnight stays noted by this research and also Mills *et al.* (2000), accommodation is limited in quantity within the Humberhead Levels (Rotherham *et al.*, 2002b), if not variety in the Somerset Levels (Mills *et al.*, 2000). As with Mills *et al.* and Somerset Levels and Moors accommodation, the use of maps sourced from Farm Stay UK illustrate the lack of farm-based accommodation within the Humberhead Levels and Fens, Map 5 and Map 6. Although not illustrating all accommodation, the lack of farm accommodation is perhaps indicative of a general lack of accommodation within the study regions. With little suitable accommodation, the lack of overnight stays becomes more understandable.

4.3.6. Distances travelled by visitors to case study regions and attractions

Further to the limited number of overnight stays are the distances visitors travel to visit the study regions and attractions (section 4.1.1.). An assumption is made that if travel distances and time are comparatively short, as expected of day-visitors and indicated in the GB Day Visits survey (Anon., 2004), then it is likely that visitors will return home. Thus travel distance and time may influence visit duration. Such assumptions seem to be applicable. PACEC (2004) note that the majority of Wicken Fen visitors travel between five and fourteen miles, are day-trippers, and comprise a high proportion of local visitors, further observing that

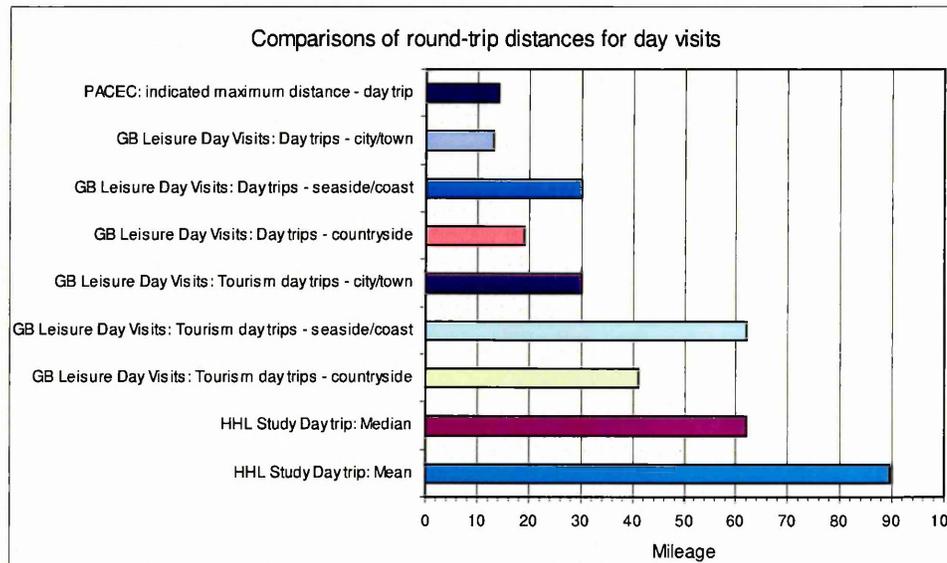
"In Cambridgeshire, the evidence indicates a high proportion of day-visitors travelling relatively shorter distances"

(PACEC, 2004, p.148).

Similarly 'locally' orientated, 71.7% of visitors to RSPB Dearne Valley originate from within the South Yorkshire area (Rotherham *et al.*, 2005b). Conversely, and perhaps as a reflection of the greater numbers of holiday visitors along the Norfolk coast, Rayment *et al.* (2000) note that proportionally few visitors live within the local area of the Norfolk RSPB reserves being studied. This factor is further noted in varying degrees in studies of Scottish, Gloucester and Suffolk-based wildlife attractions, although this latter RSPB study notes that overall, 30% of respondents lived locally to the reserves being surveyed (Rayment and Dickie, 2001). PACEC (2004) further suggest that the location of a wildlife attraction in relation to a holiday destination area will affect the origin of visitors, with consequences for the proportions of local, day and staying visitors. However, the study areas of the Humberhead Levels and the Fens are not traditional holiday regions, unlike Norfolk, Scotland and Suffolk, and even the Somerset Levels and Moors are considered undeveloped in respect of tourism (Mills *et al.*, 2000). Thus the influence of holiday visitors on data collected is considered to be less.

With respect to distances travelled by visitors during day-trips to the countryside, the GB Day Visits Survey (Anon., 2004) gives 18.7 miles as the average, round-trip distance travelled. The average, round-trip distance travelled for tourism day-trips to the countryside is further given as forty-one miles. Distances for seaside and city round-

trips are also noted as sixty-two and thirty miles respectively. However, the average (mean) distance travelled by day-trip visitors with respect to this research is 44.7 miles *one way*, an 89.4 mile round trip. In allowing for extremes within the mileage data collected, the median distance travelled for a round trip is 61.8 miles. Thus the distances travelled to the wildlife attractions within study regions of the Humberhead Levels, the Fens and Somerset Levels and Moors are considerably greater than those identified by the GB Day Visits Survey, and noted by PACEC (2004), as detailed in Graph 38.



Graph 38: Comparisons of round-trip distances travelled by day-trip visitors.

4.3.6.1. Distances travelled by 'local', day-trip visitors.

With regard to day-trip visitors, consideration must also be given to local, day-trip visitors. As noted in sections 2.2.4. and 4.4.0., how 'local' is defined can impact on conclusions drawn from studies, thus any definition requires appropriate consideration, and this is equally appropriate when considering distances travelled by visitors and their 'local' or 'non-local' status. Used in a variety of studies and contexts (Lorendahl, 1996; Eargle, 1997; Fleischer and Felsenstein, 2000; Vaughan *et al.*, 2000; Rayment *et al.*, 2000; Gursoy *et al.*, 2004), the terms 'local' and 'non-local' are rarely defined in relation to distance. Thus attempting to ascertain distances travelled by visitors with respect to their being 'local' can be difficult, and undeclared assumptions are made by studies that beyond a certain, unspecified distance, visitors are no longer local, and their impacts take on a different context. From studies that do provide 'local'-related distances and definitions, it would seem that 'local' can be a comparatively short and variable distance;

one mile (Broadbridge and Calderwood, 2002), between five and fourteen miles (PACEC, 2004), ten kilometres (Robertson and McGee, 2003), twenty miles (RSPB, in PACEC, 2004), and up to fifty miles (NAFM, 2002), Table 66.

From the data collected, it can be seen that 75% of visits lasted for up to one day (Graph 8), and thus are considered day-visits. Of these, 32% indicated they lived locally⁵.

However, using the furthest 'indicated local' distance (fifty-two miles: section 4.4.6.) as a limit, potentially 66% of day-trip visitors are local⁶. Thus, aside from 75% of visitors being day-trip visitors, with 66% of day-trip visitors potentially being 'local', 32% indicating themselves as 'local', and with 40.7% of staying visitors staying with family and friends, the demand for paying accommodation is consequently reduced. The importance of day-visitors, including 'local' visitors, is enhanced. Clearly, therefore, the omission of day-trippers and or local visitors from recreation impact studies will have consequences for conclusions made.

The data suggest that day-trip visitors to the study regions and attractions are prepared to travel considerably further than studies suggest (Anon., 2004: PACEC, 2004). With the predominance of the visitor surveys being undertaken within the Fens, considerations must be given to road infrastructure within the Fens, and the remoteness of the landscape with respect to visitor facilities and population densities. Whilst flat and with comparatively quiet roads, due to the number of water courses and relatively few crossing places, distances can become 'extended', i.e. visitors have to travel further to get to an attraction as there are often no direct routes. Thus mileages are increased, although this is likely to be relatively small in consideration of overall distances travelled. Furthermore, factors such as poor and difficult transport infrastructure could deter potential visitors. However, from the distances travelled by those on day-trips, and although negative comments regarding roads have been noted, it appears that visitors do not consider such distances an inconvenience. Again from visitor comments made, the quality of the attractions and the landscape in general appear to counter any negative aspects associated with transport infrastructure and distances travelled: day-trip visitors are prepared to travel considerable distances to wildlife-related destinations of their choice.

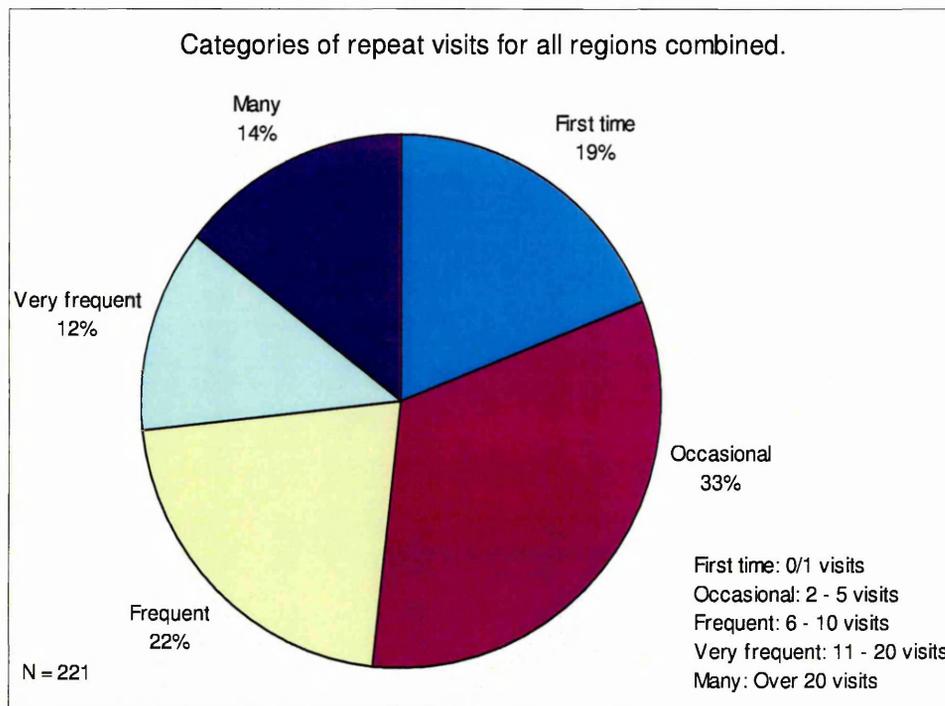
⁵ Based on a sample of 194 visitors who provided trip duration and postcode details.

⁶ Ditto.

4.3.7. Previous, repeat visits and the potential for visitor loyalty.

Whilst all visitors will be important to an attraction and region, encouraging repeat visits will enhance visitor income potential and the longevity of visitor attractions as sources of income and employment. PACEC (2004), in postal surveys of more specialist visitors to wetland attractions, note that 30% of respondents who had visited Wicken Fen visit between two and five times per year. For other wetland sites similarly surveyed by PACEC, the majority visit between one and five times per year. 12% visit Wicken Fen more than five times a year, 18% and 3% visit Holme Fen between two and five and eleven and twenty-five times per year respectively, and 24% and 9% of visitors visit Woodwalton Fen between two and five and over five times per year respectively. Although repeat visit data obtained during current research was obtained by on-site distribution of surveys, rather than via post, and did not ask for visits per year but repeat visits overall, PACEC's (2004) findings concur with findings shown by this research and illustrated in Graph 39: that 81% of visits to wetland attractions are repeat visits. Further to this in respect of intended repeat visits, data collected during this current research illustrates that of all visitors who indicated a desire to undertake repeat visits to surveyed attractions and the study regions, 91.6% and 96.7% responded 'yes' respectively.

It should be noted, however, that the findings of PACEC, being a postal survey, include those who had never visited Wicken, Woodwalton and Holme Fens, 12%, 30% and 52% respectively. Thus proportions of repeat visits detailed by PACEC include these 'non-visits', and are consequently higher in consideration of repeat visits only. However, due to potential differences in sample proportions between on-site and postal surveys, caution should be taken in comparing the above data. It should also be noted that the PACEC survey sample is small, with thirty-three survey responses.



Graph 39: Proportions of repeat visits to study regions.

Similarly to PACEC (2004), Rayment *et al.*, (2000) note a high proportion of repeat visits to wildlife sites within Norfolk, with 34% and 22% of visitors making between three and ten visits and over twenty visits respectively within the previous two years. Rotherham *et al.* (2005b) also note high proportions of repeat visits to RSPB Old Moor, South Yorkshire. More than one third of visitors from outside of South Yorkshire had made between two and four previous visits, with a further third visiting over five times. 88% of visitors claimed an intention to revisit RSPB Old Moor within a few months of the 2004 visitor survey. Rotherham *et al.* (2005b, p.5) also note an increase in repeat visits by local, South Yorkshire based visitors, observing that

".....the reserve once visited is seen as worthwhile as a repeat destination irrespective of distance travelled".

Whilst new and first-time visitors will engender a future generation of repeat visitors, the visitor loyalty alluded to by Rayment *et al.* (2000), Rotherham *et al.* (2005b), and PACEC (2004) and identified during current research within the proportions of previous and intended repeat visitors, will be of great importance to visitor attractions. Whilst some visitors will have a specialist interest, i.e. bird watching, and therefore have a specific reason for making repeat visits, many visitors to such attractions are non-specialists (PACEC, 2004), and thus their reasons to visit are more diffuse. Such

loyalty, therefore, is likely an indication of the quality of the attraction and the surrounding region, and indicates a visitor demand for the product on offer, whether wildlife or a place to stop for a drink and to socialise. Repeat visits should ensure a continued income source for attractions, with benefits for the surrounding economy and the potential for associated visitor facilities to be established as a result of continued visitor presence and demand.

4.3.8. The importance of local repeat visits.

Rotherham *et al.*, (2005b) note that all visitors who lived within the vicinity of RSPB Old Moor, i.e. local visitors, intend to make repeat visits to the reserve. PACEC (2004), in observing the high proportion of visitors who travel comparatively short distances and the number of repeat visits made to wetland attractions, infer that local visitors comprise an important component of repeat visits (section 4.3.6.1.). From data collected during current research, of the fifty-one indicated local visitors who provided information on their intent to make repeat visits to visitor attractions surveyed, 92.7% responded 'yes' to undertaking repeat visits. Further to this, of those seventy-two visitors overall who indicated that they lived locally, 37.5% indicated that they had made previous visits to the attractions surveyed. However, these percentage proportions represent the *minimum* proportion of local visitors. With potentially 66% of all day-visitors being considered 'local', the importance of visits made by locals could be greater than suggested. Table 60 and Table 61 detail comments made with respect to 'local' and repeat visits to attractions and study regions.

| Attraction | Visitor response |
|--------------------------|---|
| Boston Park Farm | Good local attraction Good fun, picnic area, local |
| Wicken Fen | Because it's local, & we are National Trust membersto visit during different seasons in the year |
| WWT Welney Centre | Close to home, floodlit (swan) feeding excellent Always a friendly atmosphereone can buy gifts that we see nowhere else Have today joined the WWT so will now make a point of returning regularly Easy to get to. Well run Live nearby. Enjoy the wildlife, café & shop Want to see swan feeding at night/to see night-time feeding Interesting events We are interested in wildlife.....found it very interesting Will carry on coming here once or twice a year We will bring our grandchildren It is so peaceful Keen animal/bird watcher Enjoy the collection of birds To see the migratory birds in winter Member of WWT & love wildlife & countryside Regular relaxation with mental stimulation |
| RSPB Ouse Washes | Local & interesting Local to residence (to see) seasonal fluctuations re. birds Birdlife always altering We enjoy the bird watching at all times of the year & beauty of the scenery |
| Flag Fen | Enjoy visiting at different seasons. For peace & time for reflection Lots to do & see, very scenic Its a working dig & new things appear to reshape understanding Still more to see Good afternoon spent with kids To show friends & relations the site Kids like it. Adults like it & it is different every time we go It is a major attraction |

Comments sourced from visitor questionnaires indicating local visitor responses only.

Table 60: Local visitor responses given in respect to repeat visits to attractions.

| Region | Visitor response |
|--------------------------|--|
| Humberhead Levels | Quiet, good wildlife (for the) birds Areas of unspoilt countryside To concentrate on the wildlife & flora |
| Fens | Live nearby - like the scenery Pleasantly unique Love the area A lot to visit Historic landscape Very many places of interest.....throughout the area Love locally, & good for walks Will always ride around looking for new destinations to visit Like the big sky formations More places to visit/revisit To explore Man's relationship with the landscape |

Comments sourced from visitor questionnaires indicating local visitor responses only.

Table 61: Local visitor responses given in respect to repeat visits to study regions.

4.3.8.1. Forced loyalty or repeat visits by choice?

It could be argued that a lack of visitor attractions within study regions forces repeat visits, there being no alternatives, in particular for local people in light of the potentially high proportion of local visitors. This argument, however, is lessened by the distances travelled by day-visitors, Graph 38, as compared to day visit distances travelled identified in the GB Day Visits Survey (Anon., 2004), and by the descriptive responses given by visitors surveyed, Table 62 and Table 63. The distances travelled by visitors place many other attractions within reach, including those of local visitors and attractions within their locality but outside of the study regions. Clearly, visitors travel considerable distances and make repeat visits by choice. That some visitors surveyed commented that they visit just for the birds and would also go anywhere to see birds, the location being unimportant, is not detrimental to the regions concerned, but rather testament to the quality of bird-life and associated attractions within the study regions. If the quality of bird life and associated attractions was poor, visitors would not travel such distances into the study regions, but would rather travel to other regions with higher quality nature-based attractions. With respect to individual attractions surveyed within the Fens, Table 64 details the proportions of visitors who indicated that they would make repeat visits, further indicating attraction quality. In addition to this, of visitors who provided a response, 100% of Humberhead Levels visitors and 95.5% of Fen visitors indicated they would make repeat visits. Thus a visitor demand of modest scale exists, providing the opportunity for development and an increased visitor market.

| Attraction | Visitor response |
|--------------------------|---|
| Wicken Fen | Interested to see at different seasons of the year So much of interest for us. We would like to come at different times of the year Whenever I need to be away from 'civilisation' & to be close to nature & where I can walk & watch wildlife |
| Flag Fen | Still more to see To show relations and friends the site Will take visitors to this interesting place To take part in another workshop & special days Kids like it, adults like it & it is different every time we go: we have watched it develop |
| WWT Welney Centre | Excellent wildlife spot all year In winter for migrants (birds) To bring my grandchildren again in winter. It's warm & suitable for children Close to home, floodlit (swan) feeding excellent Will carry on coming here once or twice a year Very interested in all the birds and look forward to summer visit To visit the swans in winter & other wildlife in summer A relaxing place, quiet, good escape from everyday living |
| RSPB Ouse Washes | Return to see the birds Seasonal fluctuations and changes re. birds We enjoy the birdwatching at all times of the year & the beauty of the scenery Local and interesting |

Table 62: Reasons given for undertaking repeat visits to wildlife attractions within the Fens.

| Region | Visitor response |
|------------------------------------|---|
| Humberhead Levels | Yes - to see the development of the natural sites & wetland areas Yes, to concentrate on wildlife and flora Yes - ecology of the area There seems to be lots of other places of interest There are so many places of interest to explore in the future So much to see & discover - e.g. the picturesque villages, RSPB sites Lovely area - so much more to see |
| Fens | To see the parts we didn't have time for. To see the area at different times of year Its close enough for a day-trip Very many places of interest for all ages throughout the area Explore more parts of the area Always something to see Lots to do and see Because of WWT Welney & RSPB reserve Because of stark landscape For the peace & quiet Love the area |
| Somerset Levels & Moors | Yes - for the freedom to roam and watch wildlife at close range Yes, definitely |

Table 63: Reasons given for undertaking repeat visits to the study regions.

| Attraction | Proportions of indicated repeat visits |
|-------------------|--|
| Wicken Fen | 95.2% |
| RSPB Ouse Washes | 100% |
| Flag Fen | 79.5% |
| WWT Welney Centre | 96.0% |

Table 64: Proportions of visitors indicating intentions to make repeat visits to wildlife attractions within the Fens.

4.3.9. Conclusion.

With visitors mostly being older, visitor party sizes averaging around 2.5 visitors, and with a propensity for visits lasting up to one day, the visitor profile identified within this research is supported by similar findings within related literature (PACEC, 2004; Mills *et al.*, 2000; Rayment *et al.*, 2000; Rotherham *et al.*, in press, 2004a). Whilst day visits comprise the greater proportion of visits, and thus a primary visitor segment to be marketed to, nonetheless at 25% of visits, overnight staying visits are an important component of the visitor market, and an aspect to be considered in encouraging future development. Clearly however, the lack of accommodation identified within the case study regions impacts on any potential staying visitor market. Such a factor may also be a consideration with respect to the distances travelled by day-trip visitors, at a mean of 89.4 miles round trip, distances far in excess of those identified by similar studies and the GB Day Visits survey (Anon., 2004; PACEC, 2004; Rotherham *et al.*, in press, 2004a). With little accommodation, day-trip visits become a necessity. Further to distances travelled, the research identified a high use of attractions by local visitors. Whilst 'local' has no fixed definition, as discussed within the literature review (Chapter Two), nonetheless, that visitors who consider themselves local use nearby attractions has implications for the retention of income within local economies. With respect to establishing a nature-based recreation and leisure market with the aim of supporting rural economies, the issues presented above are considered further within the research discussion (Chapter Six).

As with similar studies, the research findings indicate a high propensity for repeat visits to wetland and wildlife attractions, from local visitors or otherwise. Such repeat visits suggest a liking and loyalty amongst visitors for wetland and nature-based attractions, thus indicating a potential element of longevity to such visitor attractions and ensuing contributions to local economies. As such, visitor spend data and associated economic benefits with respect to this research and that identified in similar studies is discussed in the following section, (section 4.4.0.), with the potential impacts of visitor spend on farm and rural viability discussed further within Chapter Six.

4.4.0. Section Four: Visitor spend and economic considerations.

4.4.1. Introduction.

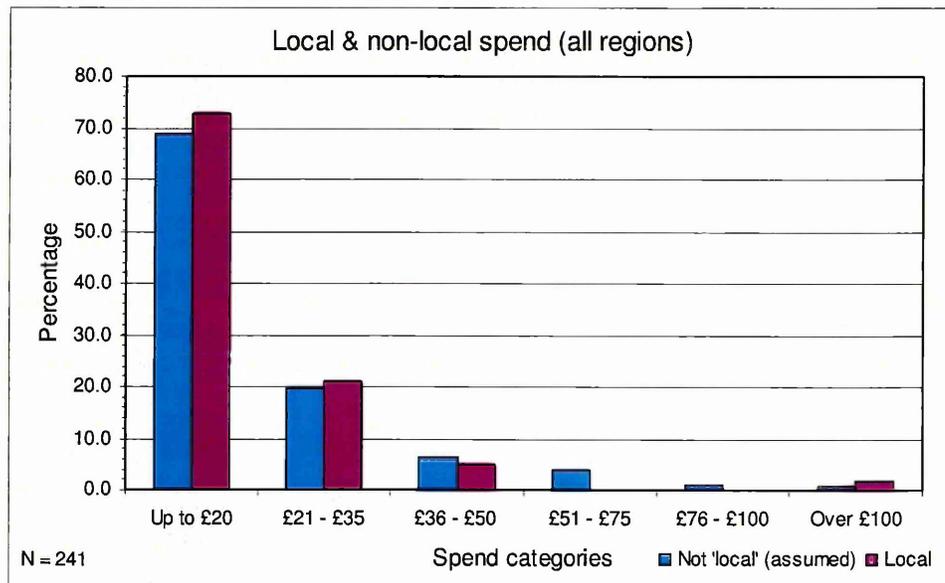
With the visitor profile established, and indications of a loyal customer base and repeat visits to wetland and nature-based attractions noted, issues of potential visitor spend and inputs to local economies require consideration. With the aim of increasing the viability of rural economies, potential visitor spend is clearly an important factor in the establishment of a rural attraction. With respect to nature-based attractions as a consideration for the research, and irrespective of any environmental benefits gained, an attraction that does not attract visitors or that fails to act as a catalyst in drawing visitors to the wider area and associated attractions is unlikely to survive. This is unless, with respect to publicly supported attractions, clear links to wider economic and social benefits can be established. Examples of recently established, high-profile attractions that have failed to attract sufficient visitors and therefore income, having subsequently closed, include the Earth Centre, Doncaster, and the National Centre for Popular Music, Sheffield. In this respect, an assessment of potential visitor spend is critical in understanding the economic impacts such an attraction may have, both in terms of its own survival, and associated impacts on the neighbouring area. However, many, often academic tourism and visitor-related studies place an emphasis on overnight staying visitors as pre-eminent economic contributors (Flognfeldt, 1999). Many non-academic reports such as the GB Day Visits Survey (Anon., 2004) and GBA (2005) emphasise the importance of day-trip visitors, whilst economic literature frequently discounts the contributions of local spend (Crompton, 1995; Crompton *et al.*, 2001). Thus issues of the economic evaluation of visitor spend become less clear and open to much interpretation.

4.4.2. Visitor types; local and non-local visitors.

Whilst anyone who visits an attraction can be described as a 'visitor', within this there are local and non-local visitors. From the perspective of an attraction operator, visitor spend is visitor spend. Traditionally however, in economic and tourism terms, local and non-local visitors, or tourists, are viewed differently, and their economic impacts can be

assessed in different ways. Consequently, depending on perspectives, the importance and economic impacts of such visitors can vary greatly. Thus a definition of 'local' is required prior to assessing visitor spend, as is the importance or not of local visitor spend. Such issues are discussed in section 2.2.4., and in the following sections.

Table 21 and Graph 4 detail and illustrate the quantity and proportions of indicated⁷ local and non-local visitors. From these, it can be seen that, as could be expected, non-local visitors comprise the majority, and thus contribute most visitor spend. However, Graph 40 suggests that indicated local visitors, proportionally, spend more in the lower, up to £20 and £21 - £35 categories. Whilst a Mann-Whitney statistical test shows little significance within the data for Graph 40, with an asymptotic significance, *p*, of 0.454, Table 65, nonetheless it would appear that local visitors have a greater economic impact per visitor than is given credence within much visitor and tourism-related economic literature. Local visitor economic contributions are often discounted from associated impact studies (Hudson, 2001; Crompton *et al.*, 2001) and this potential therefore requires further consideration.



Graph 40: Proportionate local and non-local spend.

⁷Indicated local' refers to those visitors who indicated that they considered themselves to be local in responding to questions within the visitor questionnaire. See section 4.1.3.

| | Approximate daily visitor spend |
|---|---------------------------------|
| Mann-Whitney U | 5263.00 |
| Degrees of freedom (<i>df</i>) | 240 |
| Z | -.748 |
| Asymptotic Significance (2-tailed) (<i>p</i>) | .454 |

Table 65: Mann-Whitney test output for local and non-local spend.

4.4.3. Local visitor income: local or non-local, recycled or 'new' money?

As noted in section 2.1.0, the economic importance and potential of visitor and tourism-related income is noted in many articles, both academic and practitioner (Andrew, 1997; DCMS, 1999; Fleischer and Felsenstein, 2000; Rayment *et al.*, 2000; Wilson *et al.*, 2001). Economic studies also highlight the importance of visitor income, of what is considered 'new' money within a region, of what is considered existing, recycled money within a region, and of the associated benefits. Much of this literature is concerned with non-local visitors, and suggests little benefit is derived from local visitors. Such spend is simply considered 'recycled money', with economic benefits coming from non-local visitors and 'new money' as an import of capital into the local economic cycle (Crompton, 1995; Yu and Turco, 2000; Crompton *et al.*, 2001; Hudson, 2001). However, to ignore local visitor spend is to ignore their input into their own, local economy, and thus sources of income so provided. Local visitor spend further reduces the export of capital from local economies, with benefits for maintaining monies within local economic cycles.

The research has indicated that, for all three study regions combined, 25.9% of visitors consider themselves locals. Whilst many definitions of 'local' seem to be based on arbitrary decisions, in this case, it is the local's own perception of themselves and the study regions that has provided the 'definition'. Thus, for many tourism and economic studies, 25.9% of the visitor spend data could be discounted from this study, being considered 'recycled money' (Crompton, 1995; Crompton *et al.*, 2001), rather than the all important 'new' money added to the local economy. Further to such spend potentially being 'recycled money', Crompton (1995) assumes that money spent at an attraction or event by local visitors could, in fact, have been spent within the locality on other products and services, and thus is potentially "*switched spending*" rather than extra spend (Crompton *et al.*, 2001, p.81). Again, such local spend is considered

inappropriate for inclusion within economic impact studies. Indeed, Hudson (2001) suggests the inclusion of local spend will artificially inflate estimations of economic impacts, whilst Crompton (1995) details numerous economic studies that indicate that local spend should be disregarded from economic studies. He suggests local spend is often include as a nefarious way in which to inflate the economic importance of an event or attraction. As such, suggests Crompton (1995), economic impact figures can be artificially raised to impress and mislead policy makers and the public, and thus 'justify' development associated with an economic study.

However, it could be equally argued that to ignore local spend would distort and lessen economic impact estimates. Money spent outside of an individual's local area is in fact an export of capital, and thus a loss to the local economic cycle. Conversely, the 'recycling' of money within a local economy maintains money within that economy, thus enhancing economic gains. Thus, with respect to including visits to local attractions and therefore local spend within economic studies, Hansen and Jensen (1996, p.287) note with respect to holidaying at home that

"Holidays at home arean activity which competes with imports, and should be included in calculations of the economic impact of tourism".

In considering this aspect of local spend, Crompton (1995, p.27), and further referencing Getz (1991, in Crompton, 1995) in reference to special events, makes allowances for people "*vacationing at home*", suggesting that money thus spent by a local resident is not exported from the local area, and is therefore an acceptable locally sourced economic benefit that can be included in impact studies. Quite how the differences between this 'vacationing at home spend' and the excluded 'recycled money' and 'switched spend' is determined is unclear. Yu and Turco (2000) note that there has been a recent trend to include local resident spend in economic impact studies with reference to special events encouraging local spend. In noting that this "*import substitution*" (Yu and Turco, 2000, p.139) can comprise a major component of overall spend, potentially equalling traditional visitor spend, Yu and Turco suggest that ignoring such local spend could underestimate economic impacts.

4.4.4. The source of visitor income.

Excluding local spend also assumes that the income source of local people was within the same region as, for example, a visitor attraction. This may not be so. Whilst a proportion of individuals will have employment within their local region, further perpetuating the recycling of existing money and thus generating a greater multiplier effect through the local spending of that money (Cooper *et al.*, 1998), others will have employment outside of their local region and or outside of the locality of their local attractions. Thus, any earnings such people receive will be an input of income to their local region and economy, irrespective of the fact that they are 'local'. So when local visitors spend money at their local attraction, is the money they spend a recycling of existing money, or the spending of 'new', imported money, i.e. imported earnings? Further to this, the finance and materials necessary to operate a business may well be a mix of existing and imported finance. Economic leakages from one region will benefit another region. Perhaps the crucial factor is not where a person lives in respect to their local attractions, but where they have employment. Thus local spend at local visitor attractions should be considered in visitor-related economic studies on the basis that the employment income source is not known but that employment income is the source of visitor spend.

4.4.5. Business viability and spend.

With respect to the maintenance of local services and recreation businesses, without spend of any type, businesses would be short lived. As far as a business proprietor is concerned, spend is spend, and the viability of a business is not necessarily dependant on spend by non-locals alone, but rather by spend *per se*, by locals and non-locals alike. Whilst visitor spend may form the bulk of business turnover and profit, without which the business could fail, equally, spend by locals, although possibly proportionately less, may also be critical to business survival, particularly in quieter, off-season periods. Thus, in terms of the overall viability of rural communities and services, all spend is important, again encouraging the inclusion of local spend within economic impact studies.

4.4.6. The range of 'local' visitors.

As noted in sections 2.2.4. and 4.3.6.1., and referred to above in respect of local visitor income, the term local has no definitive definition, and can be a moveable feast depending on perspectives. As further noted above, 25.9% of visitors surveyed considered themselves to be local, and thus it would seem appropriate to base local-related issues on this 'self-assessed' definition of local. However, through the use of visitor's own considerations of 'local', and those found within the literature, 'local', in the context of this research, could range from one mile (Broadbridge and Calderwood, 2002), to fifty-two miles, the furthest distance an indicated 'local' visitor lives from a surveyed attraction. By choosing all visitors who travelled less than either of these two figures, the proportion of local visitors could vary from two visitors who live within one mile of an attraction, to 150 visitors who live within fifty-two miles of an attraction. 0.76%¹ and 56.8%¹ of visitors surveyed respectively. Even if thirty miles is used as a limitation for 'local', as defined by NAFM (2002) and SWLFP (2003), this equates to 111 visitors, at 42.0%¹ of visitors surveyed. The extent to which each distance-related definition, as identified within the literature, affects the proportions of visitors surveyed is detailed in Table 66.

| Reference | Distance | 'Local' visitors within distance-related definition ¹ | |
|--|--------------|--|--------------------|
| | | Number | Percentage |
| Broadbridge & Calderwood (2002) | 1m | 2 | 0.8% |
| Robertson & McGee (2003) | 6.25m (10km) | 18 | 6.8% |
| Kaldellis. (2004) | 12.5m (20km) | 46 | 17.4% |
| <i>Self-indicated 'local' visitor</i> | | 72 ² | 25.9% ² |
| RSPB, in PACEC (2004) | 20m | 71 | 26.9% |
| National Association of Farmers Markets (NAFM, 2002) South West Local Food Partnership (SWLFP, 2003) | 30m | 111 | 42.0% |
| CEC (1991) | 40m | 131 | 49.6% |
| Selby District Council (<i>Survey data</i>) NAFM (2002) definition for large cities & coastal regions | 50m | 147 | 55.7% |
| <i>Visitor survey maximum distance self- indicated 'local'</i> | 52m | 150 | 56.8% |

¹Percentage based on sample of 264 visitors who provided information of home destination, & thus mileage travelled.

²Visitor, self-indicated 'local' definition based on a sample of 278.

Table 66: Affects on 'local' visitor numbers by definitions of 'local' within the literature.

Such a range of 'local visitors' has clear implications for conclusions drawn. Should the economic impact of locals be deemed irrelevant, then selecting a 'local' definition of one mile would be beneficial, illustrating the importance of 'new' money to an economy and

the greater value of non-local visitors. Conversely, if local visitors were deemed important, the fifty or fifty-two mile 'definition' would be most appropriate. At this value, local visitors outnumber non-local visitors, and consequently local spend receives greater importance, as already proportionately indicated by Graph 40 at a mere 25.9% of 'locals'. Add to this any non-market, intangible benefits received by local communities, the maintenance of local services, the potential for an attraction to attract inward investment to its locale (Rotherham *et al.*, 2002a), and the value and therefore justification afforded to a local community by establishing an attraction is greatly enhanced, all through the selection of an appropriate definition for 'local'. As Hansen and Jensen (1996) observe, different definitions produce different results.

4.4.7. Inclusion of local visitor spend.

The proportions of local and non-local visitors are important in terms of marketing and in assessing non-market benefits to local communities. However, with respect to income generation, the potential for bias introduced by selecting a definition for 'local' in a visitor context is great. Potentially 66% of day-trip visitor spend could be discounted from this current research if spend by visiting locals is excluded. Such local spend, or "*import substitution*", as noted by Yu and Turco (2000, p.139),

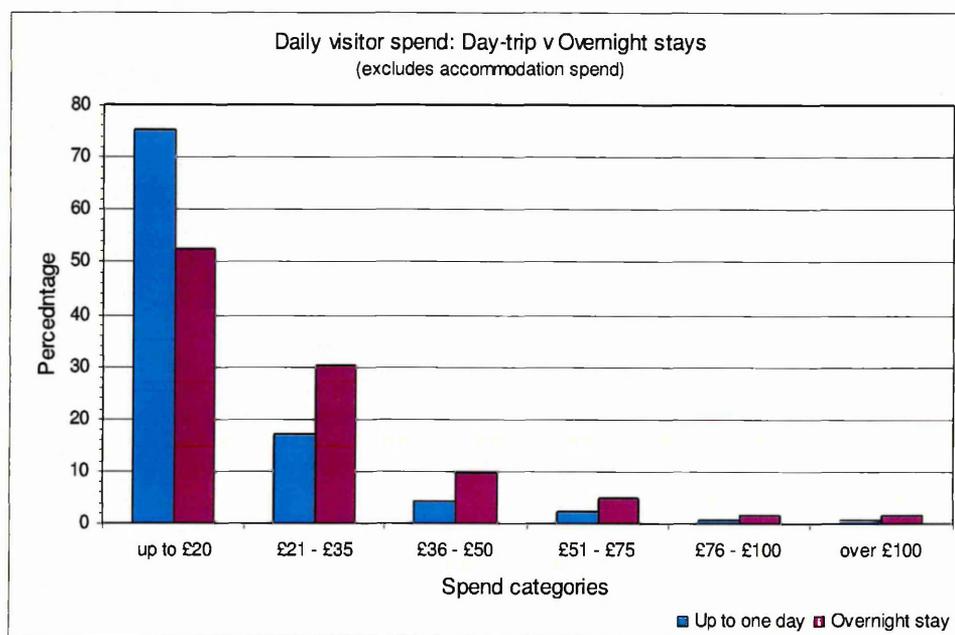
"can be a significant component of overall economic impact, and may be fully as large as the traditional or primary expenditures generated by visitor spending in the area".

Thus, with respect to visitors and visitor spend, to avoid any bias and consequential misinterpretations of financial implications, visitor spend and resultant economic analysis should include all visitors, locals or otherwise, thus ensuring all spend is accounted for. Used with appropriate caution and consideration, the more realistic, unadulterated findings thus produced should enable economic impacts to be more fully assessed.

4.4.8. Visitor types and their daily spend: day visits and overnight stays.

The proportions of local, day-trip and overnight visitors are noted in section 4.1.0. and further discussed in section 4.3.0. The majority of visitors to the study regions and targeted attractions comprise day-visitors over staying visits, at 75% and 25% respectively. Thus it might be expected that day-visitors contribute greater spend overall than overnight staying visitors, simply due to the numbers of visitors. Indeed, such an observation is noted by the National Trust, who suggest that the "*perceived wisdom*" of many tourism strategies in asserting the greater benefits attributed to overnight, holiday visits is in fact open to question. For rural areas, day visits can be as "*economically powerful*" as overnight visits, with the added benefit of occurring in a non-seasonal, year round manner, contrary to the more seasonal overnight, holiday visits (National Trust, 2001. p.2).

Further to reducing the economic input of staying visitors with respect to this current research, are the 40.7% of staying visitors who lodge with family and friends, as noted in section 4.3.5., and thus do not contribute any accommodation-associated economic spend. However, with respect to visitor spend per day, Graph 41 illustrates that staying visitors proportionately spend more per visitor per day in all spend categories excepting the lowest, 'up to £20' category, than day-trip visitors.



Day-trip visitors: N = 170.
Overnight staying visitors: N = 63.

Graph 41: Daily visitor spend: day-trip versus overnight stays.

A Mann-Whitney statistical test shows that the data informing Graph 41 demonstrates a statistical difference, Table 67, rather than a data gathering or other anomaly. Thus the daily spend pattern of overnight staying visitors is statistically different to that of day-trip visitors, in this case being more in the majority of spend categories, as indicated in Graph 41.

| | Approximate daily visitor spend |
|---|---------------------------------|
| Mann-Whitney U | 4091.500 |
| Degrees of freedom (<i>df</i>) | 232 |
| Z | -3.400 |
| Asymptotic Significance (2-tailed) (<i>p</i>) | .001 |

Table 67: Mann-Whitney Test output for day-trip and overnight visitor daily spend.

Whilst it would be possible to undertake further statistical tests on the daily spend of overnight-staying visitors in relation their chosen accommodation type, thus potentially enabling the most daily spend-profitable accommodation type to be identified, the reduced sample numbers per accommodation category limits the usefulness of the information likely to be gained.

4.4.8.1. Differences in daily spend.

Although no evidence has been obtained to explain differences between the daily spend of day-trip visitors and overnight staying visitors, such differences may be purely practical. Those on day-trips, with a mean day-trip length being identified as 3.5 hours, would have need to spend little, except perhaps on snacks, a meal or admission fees, and thus spend would likely be within the lower, 'up to £20' category. Furthermore, many such day-trip visitors may bring supplies of food and drink with them, lessening the requirement to spend. Those staying overnight, however, whilst able to bring some supplies with them, are unlikely to return home for meals, which may not be included in accommodation costs. Visitors camping or staying in self-catering accommodation may require basic, everyday household goods and fresh supplies of perishable food (Dudding and Ryan, 2000). Thus, in addition to admission fees, snacks and souvenir spend, overnight staying visitor spend is likely to be in the higher spend categories.

4.4.9. Accommodation spend.

Although a lesser proportion of overall visitors at 25%, spend accrued from overnight staying visitors is nonetheless important, particularly in the context of overall spend, as noted by Alexander and McKenna (1998) and Bryan *et al.* (2004). In combining accommodation and daily spend, those who stay overnight in paid accommodation spend more per visitor and can thus proportionately be the more valuable overall, on the proviso that accommodation is actually paid for.

As a mean accommodation spend value, paying, staying visitors to the study regions spend £16.14 per night, per person on accommodation. In consideration of the Fens only, with a more even spread of accommodation types used, mean accommodation spend increases to £18.08 (section 4.1.19.). Whilst these figures are low compared to that identified by PACEC (2004), at £30 average accommodation cost, 45% of responses from staying visitors in paid accommodation spend less than £25 on accommodation. This is reflected in the 21% of visitors, the greatest single proportion, whose accommodation choice is caravanning or camping, and further observed by the fact that all those identified as staying within the Humberhead Levels spent a maximum of £10 on accommodation. Sourced from forty survey responses, those staying in paid accommodation in all regions number ninety-eight individuals, with Fens visitors in paid accommodation numbering seventy-two from thirty-two survey responses. As a comparison, those visitors staying with family and friends in all regions, sourced from thirty-three survey responses, number eighty individuals. Similar proportions of non-paying visitors staying with family and friends and those staying in paid accommodation are noted by McKercher (1996) and PACEC (2004), with GBA (2005) observing that 36% of staying visitors to Lincolnshire lodged with family and friends. Clearly, therefore, a high proportion of potential accommodation spend is 'lost' through family and friends visits, and associated economic benefits reduced.

With respect to accommodation spend, the actual cost may vary, depending on whether rooms are priced per room or per person, or camp sites per tent or per person. Thus figures provided are necessarily approximate.

4.4.9.1. Visiting friends and relatives - compensation for 'lost' accommodation spend.

Although noted as 'lost' accommodation spend, nonetheless, visitor responses to the visitor surveys conducted during this research indicate that some identified local residents take friends and relatives to see local attractions, thus encouraging local spend. This occurrence is also noted by PACEC (2004), and the potential for which is noted by McKercher (1996) and Seaton and Palmer (1997). As such, not only are the visiting friends and relatives contributing to the local economy, but so possibly are the local residents. In this manner, their visitor attraction spend contributions may be extra additions to the local economy in that without the visiting friends and relatives to instigate a visit to a local attraction, local residents may not have visited that attraction. Further to this, visiting friends and relatives can cause hosts to purchase extra goods, i.e. food, drink and associated supplies, thus increasing local spend. Whilst not necessarily attributable to the local visitor market (Seaton and Palmer, 1997), without the visiting family and friends, such extra purchases may not have occurred (McKercher, 1996). Thus, whilst some visitor accommodation spend is 'lost' through stays with family and friends, this may be partially compensated for by other spend gained through local residents purchasing extra supplies and 'showing off' their local area and attractions to visiting friends and relatives. In this respect, visiting family and friends may be an under-represented section of the visitor market in terms of economic inputs to local economies (Seaton and Palmer, 1997), and their hosts important stakeholders in their local visitor market (McKercher, 1996).

4.4.10. The importance of day-trip visitors.

Considerations of the greater spend potential per overnight staying visitor, as opposed to day-trip visitors, in conjunction with the perception that a tourist is someone who stays overnight, has led much tourism-related research to concentrate on the accommodation sector as representative of tourists and tourism as a whole (Flognfeldt, 1999). Such "*partial studies*", conducted as they often are at accommodation suppliers, thus inflate the economic impacts and influence of staying visitors, at the expense of "*non-visitor(s) or non-important tourists*" (Flognfeldt, 1999, p. 362 & 359), i.e. non-staying and transient visitors, with consequences for tourism development and associated policy. Downward and Lumsdon (2000) suggest that day-trip and transitory visitors, their

expenditure and behaviour, have been excluded from destination marketing research, noting that visitor destinations usually attract a range of visitors, not just those staying overnight. In concurrence with this, Shibli (2004) notes that the use of visitor data obtained only from accommodation suppliers, whilst ignoring the greater range of visitors who use a facility, limits the reliability, validity and credibility of any resulting economic impact studies.

In the context of this research, day-trip visitors exceed overnight staying visitors by a ratio of 3:1. As noted in section 4.3.4., similar and higher proportions of day-trip visitors are also reported by Mills *et al.* (2000) and Rotherham *et al.* (2005b). Rayment *et al.* (2000) and Rayment and Dickie (2001) note that 54% and 56% respectively of visits to RSPB reserves studied comprised of local and day visits, with PACEC (2004) noting a majority of day-trippers to Wicken Fen. Connell (2004) observes that 55.1% of visits to UK garden centres were day visits from home, and 44.9% holiday trips, thus indicating the importance of day-trippers to attractions. Continuum (2004), with respect to tourism within the Yorkshire Wolds, note day-trips accounted for 95% of visits. GBA (2005) evidence that 86.2% of the 21.8 million visitors to Lincolnshire are day-visitors, whilst Downward and Lumsdon (2000) note home-originated day-trips accounted for 95% of 1994 leisure trips, with just 4% originating from holiday locations.

With the value of rural day visits being considered as economically beneficial as that of rural, overnight staying visits (National Trust, 2001), the GB Day Visits Survey (Anon., 2004) highlights this potential, evidencing that 5.2 billion day-trips, including 1.26 billion day-trips to countryside locations, were taken between March 2002 and March 2003. In support of the value of day-trip visits, Bryan *et al.* (2004, p.35) note that

*"the most important portion of tourism expenditure (in Wales)
.....comprised expenditure made by day trippers".*

This equated to 42.9% of total tourism expenditure. A similar proportion, 45%, was noted to originate from day-trip visitors to the Heart of England area during 1995, with over 90% of visitors being day-trip visitors (Alexander and McKenna, 1998). GBA (2005) indicate that 56.5% of visitor spend within Lincolnshire originates from visitors on irregular day-trips, whilst the East Riding Of Yorkshire Council comment that in absolute terms, day-visitors generate more income than visitor nights (*Survey data*),

whilst the Countryside Agency (2000c) observe that 77% of spend in UK countryside areas, and up to 90% of spend at attractions, originates from day-visitors. Flognfeldt (1999, p.372), in a rural Norwegian study, observes that "*far more than half*" of visitors studied did not use accommodation within the study area, instead being transient visitors, and that such visitors "*are often as valuable*" as staying visitors, "*especially for attractions, retailers and catering facilities*". Furthermore, Onshus (1997, in Flognfeldt, 1999) comments that transient visitors, with transport and meal costs to consider, often have a higher spend per day than staying visitors. A meal or shopping stop, continues Flognfeldt, (1999), often follows an attraction visit, with a potentially greater propensity to spend. Such considerations could be applied to all non-staying visitors: the visit is a stop-off point on a round trip.

All though Alexander and McKenna (1998) indicate that 10% of non-day-trip visitors accounted for 55% of expenditure, and Bryan *et al.* (2004) that non-day-trip visitors accounted for 57.1% of expenditure, nonetheless, the economic input of the day-visitor sector is considerable. No other single, UK-based sector of visitors has been identified within the literature as providing a similar proportion of visitor-based income, although by combining expenditure of UK and overseas non-day-trip visitors, a greater proportion, 55%, is noted by Alexander and McKenna (1998). However, within the current study, only four visitors, 1.4% of all visitors surveyed, were identified as being from overseas. Whilst Alexander and McKenna (1998) note that 1% of overseas visitors contributed 22% of visitor expenditure within the Heart of England, this 1% equates to approximately one million visitors. With four visitors, however, there is no assurance that these visitors are representative of all overseas visitors, and thus their economic contribution is not considered as separate from UK-based staying visitors.

4.4.11. Visitor spend per day.

The research has identified that 69.7% of daily spend by all visitors falls within the 'up to £20' category, with a further 19.9% within the '£21 - £35' category (section 4.1.18). Designed to encourage survey completion and provide an indication of spend, and being based upon the average UK daily spend of £27.70 per tourism day visit, as detailed within the GB Day Visits Survey (Anon., 2004), the grading of the spend categories offers no option for survey respondents to detail spend amounts less than £20. With the

majority of spend falling within the lowest, 'up to £20' category, the data suggests a lower minimum spend category, within the region of £10-£12, was required to elicit further spend data. However, with the proportions of day, overnight staying, and local visitors being unknown prior to data collection, and thus their potential influence on data collected unknown, the use of the average 2002-3 tourism day visit spend of £27.70 was deemed appropriate. Nonetheless, with this consideration noted, calculations based on category mid-points and response frequency per category enable the mean daily spend per visit to be determined at £18.56, with the mean daily spend per visitor being £7.39, Table 68.

| Category | Category mid-point (<i>m</i>) | Frequency (<i>f</i>) | Mid -point x Frequency (<i>m</i> × <i>f</i>) |
|---|------------------------------------|---------------------------|--|
| Up to £20 | 10 | 155 | 1550 |
| £21 - £35 | 28 | 43 | 1204 |
| £36 - £50 | 43 | 13 | 559 |
| £51 - £75 | 63 | 6 | 378 |
| £76 - £100 | 88 | 2 | 176 |
| £100 - £135 | 117.5 | 2 | 235 |
| | | $\Sigma f = 221$ | $\Sigma m \times f = 4102$ |
| Mean daily spend per visitor questionnaire: | | | |
| $\text{Mean daily spend} = \frac{\Sigma(m \times f)}{\Sigma f}$ | | | Mean daily spend = £18.56 per visitor questionnaire, therefore per visit. |
| $\text{Mean daily spend} = \frac{4102}{221} = 18.56$ | | | |
| Mean daily spend per visitor¹: | | | |
| $\frac{\left(\frac{4102}{221}\right)}{2.51} = 7.39$ | | | Mean daily spend = £7.39 per visitor ¹ |
| | | | ¹ Based on 2.51 visitors per party |

Table 68: Mean daily spend calculations.

To ascertain the extent to which the comparatively few high-spend responses affect the total mean daily spend, the same calculation, minus the ten responses contained within the categories of £51 and above, was undertaken. This demonstrated that the lower 95.6% of visitors spend a mean of £15.70 per day, per visit, whilst the mean spend per individual per day was £6.25.

Further to this, the mean daily spend for day-trip visitors and overnight staying visitors separately was calculated, with mean daily spend per visit being £16.77 and £24.04 respectively, and mean daily spend per visitor being £6.68 and £9.58 respectively. As

alluded to by Graph 41 and noted by Mills *et al.* (2000), Rayment *at al.*, (2000) and PACEC (2004), and illustrated in Table 70, the mean daily spend of overnight staying visitors is generally greater than that of day-trip visitors.

As a comparison to daily spend values identified during the research, Table 69 and Table 70 provide examples of daily spend identified within the literature.

| Data source & reference | | Daily visitor spend: per visit |
|--|---|-----------------------------------|
| <i>Current Humberhead Levels research</i> | | £18.56 |
| 'GB Day Visits Survey'. (Anon., 2004). | Day visits - Leisure day-trips: | £13.70 |
| | Day visits - Countryside leisure day-trips: | £8.60 |
| | Tourism Leisure Day-trips - All trips; | £27.70 |
| | Tourism Leisure Day-trips -Countryside trips; | £20.70 |
| <i>'The Great Fen Socio Economic Study.</i> (PACEC, 2004). | East of England regional average spend | £9.60 |
| RSPB ' <i>Valuing Norfolk's Coast</i> '. (Rayment <i>et al.</i> , 2000). | | £24.52 |

Table 69: Examples of daily spend per visit.

| Data source & reference | | Daily visitor spend: per visitor |
|---|---|-------------------------------------|
| <i>Current Humberhead Levels research</i> | | £7.39 |
| RSPB ' <i>Valuing Norfolk's Coast</i> '. (Rayment <i>et al.</i> , 2000). | Average per visitor | £8.50 |
| | Home day-trippers | £6.48 |
| | Holiday day-trippers | £9.69 |
| <i>'The Great Fen Socio Economic Study</i> '. (PACEC 2004). | Home day-trippers (RSPB 1998 data) | £5.72 |
| | Holiday day-trippers (RSPB 1998 data) | £9.65 |
| | Wicken Fen day-visitors | £5.80 |
| Somerset Levels & Moors study (Mills <i>et al.</i> , 2000). | Day-trip visitors | £12.56 |
| | Staying visitors - daily spend | £14.49 |
| RSPB ' <i>Working with Nature in Britain</i> '. (Rayment, 1997). | Abernethy Forest reserve | £8.88 |
| | Red Kite viewing, Wales | £10.00 |
| | Arne heathland reserve, Dorset | £4.35 |
| <i>'The Economic Value of Walking in Rural Wales</i> '. (Midmore, 2000) | South West Coast Path (1994 data) | £5.37 |
| | Scotland (general walkers) (1995 data) | £2.50 |
| | Offa's Dyke (1994/95 data) | £3.30 |
| | Pembrokeshire Coast Path (1996/97 data) | £5.86 |
| <i>'Forest's Role in Tourism (Phase Two)</i> '. (Macaulay Institute, 2003). ^a forest only trip/combined forest-other activity trip | England: day-trip from home | £6.39/£9.60* |
| | England: Day-trip from holiday base | £8.44/£23.16* |
| | Scotland: day-trip from home | £5.93/£5.24* |
| | Scotland: day-trip from holiday base | £12.57/£14.97* |
| | Wales: day-trip from home | £10.97/£ 10.33* |
| | Wales: Day-trip from holiday base | £7.15/£8.15* |

Table 70: Examples of average⁸ daily spend per visitor.

⁸ Assumed to equate to mean daily spend per visitor, but not identified as such within referenced reports.

With respect to the values of daily visitor spend identified, their use should be treated with caution, as a guide, rather than absolute. Although comparable with figures detailed in similar studies, the use of spend categories to obtain data and then calculate visitor spend necessarily requires assumptions to be made, and resultant data is thus an indication of potential visitor spend and associated economic impacts. This understanding of assumptions made is critical, as the overestimation of economic impacts is a common issue in development proposals (Crompton, 1995; Hudson, 2001), and a regular cause of misunderstanding (Yu and Turco, 2000).

4.4.12. Visit preparation spend.

Visitors were asked to detail spend in preparation for their visit, thus enabling a total spend impact to be assessed. Whilst much of this spend will have benefits for regions outside of the study regions, nonetheless it is seen as an important aspect of the overall economic impacts associated with visitor attractions. In a similar vein, Rayment *et al.* (2000) enquired after expenditure within their study area but not necessarily at a surveyed attraction.

Although using coarse spend categories (section 4.1.21.), the data revealed that 74.4% of visit preparation spend falls within the 'up to £25' category, with 88.7% of visitors spending less than £50.00 in visit preparation. In consideration of the distances travelled by visitors, it is assumed much of this spend is on transport costs, principally petrol. Due to the high preparation spend of a relatively few visitors, with three spending between £101 - £200, and five spending in excess of £200, the mean visit preparation spend equates to £28.01 per questionnaire, or £11.16 per visitor. Limiting data to categories of less than £100 preparation spend, the mean visit preparation spend per questionnaire and per visitor falls to £20.90 and £8.33 respectively.

4.4.12.1. Admission charges and the 'loss' of free membership entry.

With respect to daily spend, a proportion of such spend will be admission charges to visitor attractions. However, not all attractions apply admission charges, and are thus free entry sites. As well as facilities such as cafés having no admission charge, many nature reserves are also free entry sites. As such, there is no immediate and obvious

economic benefit to local economies from these sites. Further to this, attractions such as WWT Welney, RSPB reserves and National Trust properties do not charge entry fees to their members. Thus, potentially, local economic spend is reduced. During 2002/03, 20,900 non-paying National Trust members visited Wicken Fen (PACEC, 2004), whilst South Somerset District Council consider that one third of visitors to the southern catchment of the Somerset Levels and Moors are National Trust or RSPB members (Mills *et al.*, (2000), and thus do not pay admission fees to associated properties. Such figures can comprise a considerable portion of overall visitors, with PACEC (2004) noting that 67% of respondents to a specialist visitor survey undertaken by them were RSPB members, with many respondents being members of more than one such organisation. Other attractions offer discounted entrance fees to members: English Heritage offers its members a 20% reduction in admission to Flag Fen, Peterborough (PACEC, 2004).

Such free and discounted admissions theoretically reduce potential income at attractions, although for national organisations, other financial considerations will offset this. As an example, for the entry of every non-paying National Trust member, Wicken Fen receives £2.20 in membership subscriptions, thus gaining an approximate £46,000 for the 20,900 non-paying member visits made in 2003/03 (PACEC, 2004). Thus in reality Wicken Fen gains financially from the 'lost' admission fees of National Trust members. Conversely, however, 20,900 paying, non-National Trust members visiting Wicken Fen would, at £4.10 per visit (2005 admission charges. National Trust, undated), have contributed £85,690 to Wicken Fen income, an increase of approximately 40% on the monies received from the National Trust in consideration of membership subscriptions related to visits by non-paying National Trust members. Thus those sites offering free or reduced entry to members appear to be of less value to the wider economy than those attractions with entry fees for all visitors.

However, in considering spend outside of admission charges and also within the context of the wider, local economy, without site ownership by the National Trust, those 20,900 non-paying visits to Wicken Fen may not have occurred, even if a similar site was operated by a private, individual business. That they did implies that some of those visitors also purchased items either at Wicken Fen, or within the locality of Wicken Fen. Thus, rather than considering non-paying membership visitors a 'loss' in income, in reality, their spend contribution outside of admission charges, i.e. food, drink and

souvenirs, could be considered a bonus. Thus, in respect of Wicken Fen, not only does the site receive income from the parent National Trust, which thus assists in site maintenance and employment, but the wider economy gains from visitor spend that may not have occurred if the National Trust did not consider Wicken Fen an important wetland and wildlife site. Not only does this emphasise the potential for wetlands and wildlife to be important contributors to local economies, but also that, when compared strictly on a site by site visitor income basis, attractions with a free entry, membership base may in actuality be undervalued in comparison with similar, non-membership attractions, and therefore undervalued within the context of the wider local economy.

Further to this, the increased public exposure afforded to such attractions by national ownership of organisations such as the National Trust or RSPB, is likely to enhance attraction appeal, thus encouraging visits. Such considerations have positive implications and potential for increased spend within local communities adjacent to such attractions, as witnessed by the National Trust providing details of local accommodation suppliers on the Wicken Fen web-site (National Trust, undated).

4.4.13. Visitor numbers and potential visitor spend.

With the establishment of estimated spend per visitor, both daily and accommodation spend, multiplying spend by visitor numbers will equate to an approximation of overall visitor-based income resulting from the presence of an attraction. From this, economic impacts such as employment potential and benefits to local communities can be investigated. Table 71 details examples of visitor attractions and estimates of overall visitor income potential within the neighbouring area, based on visitor figures provided through data collection or sourced through secondary research, and the mean daily spend of £7.39, detailed in section 4.4.11., above. Table 72 details approximations of accommodation income sourced from staying visitor number data provided by accommodation suppliers during data collection surveys, and mean accommodation spend of £16.14, detailed above in section 4.4.9., above.

It should be noted that Table 71, Table 72 and Table 73 are presented to illustrate the *potential* visitor spend associated with visitor attractions surveyed, and thus highlight potential income from often low visitor numbers. They do not represent actual values of visitor spend or associated income identified by the research, and should not be viewed as such.

| Region | Attraction | Annual visitor numbers* | Potential associated visitor spend per year (@ mean £7.39 daily visitor spend) |
|-------------------------|---|-------------------------|--|
| Humberhead Levels | Barlow Common Nature Reserve ¹ | 17,500 | £129,325 |
| | Boston Park Farm | 5,400 | £39,906 |
| | Crowle Moor Nature Reserve ¹ | 500 | £3,695 |
| | Gainsborough Old Hall | 33,000 | £243,870 |
| | Goole Boathouse | 4000 | £29,560 |
| | Owston Hall | 30,000 | £221,700 |
| | Potteric Carr Nature Reserve ¹ | 10,000 | £73,900 |
| | RSPB Blacktoft Sands ¹ | 20,000 | £147,800 |
| | The Fieldgate Centre | 3,500 | £25,865 |
| | Thornhurst Manor | 125,000 | £923,750 |
| | Waterways Museum ¹ | 20,000 | £147,800 |
| | Wholesea Grange Fishing Ponds | 820 | £6,060 |
| Fens | Chestnut Farm Shop | 6,000 | £44,340 |
| | Denver Windmill | 30,000 | £221,700 |
| | Flag Fen ² | 15,000 | £110,850 |
| | Loveys Marina | 240 | £1774 |
| | Pinchbeck Engine Museum | 2,400 | £17,736 |
| | Prickwillow Engine Museum | 2,150 | £15,889 |
| | RSPB Ouse Washes | 11,000 | £81,290 |
| | Skylark Studios | 3000 | £22,170 |
| | The Farmland Museum & Denny Abbey | 9500 | £70,205 |
| | Wicken Fen | 40,000 | £295,600 |
| | WWT Welney Centre ³ | 33,517 | £247,691 |
| Somerset Levels & Moors | Langport & River Parret Visitor Centre ⁴ | 10,000 | £73,900 |
| | Moorlynch Vineyard ⁴ | 5,000 | £36,950 |
| | Muchelney Abbey ⁴ | 12,603 | £93,136 |
| | Muchelney Pottery ⁴ | 7000 | £51,730 |
| | National Animal Welfare Trust | 15,000 | £110,850 |
| | Priest's House ⁴ | 7,530 | £55,647 |
| | RSPB West Sedgemoor ⁴ | 11,000 | £81,290 |
| | Stembridge Tower Mill ⁴ | 600 | £4,434 |
| | Westonzoyland Pumping Station | 600 | £4,434 |
| | Willows & Wetland Visitor Centre ⁴ | 28,000 | £206,920 |
| | Willows Garden Centre & Café | 50,000 | £369,500 |

*Where a range of visitor figures has been given for an attraction, e.g. between x - y visitors per annum, the lower figure has been used in calculations. Visitor number data obtained via primary research, unless otherwise referenced. NOTE: Calculated visitor spend is *not* an estimation of visitor attraction income, turnover or profit.

References: ¹Rotherham *et al.*, 2002b; ²PACEC, 2004; ³WWT, 2003; ⁴Mills *et al.*, 2000.

Table 71: Potential visitor spend associated with selected visitor attractions.

| Number of staying guests¹ (per year) | Potential accommodation income (@ mean £16.14 per night per visitor) |
|---|--|
| 50 | £807 |
| 100 | £1,614 |
| 200 | £3,228 |
| 250 | £4,035 |
| 300 | £4,842 |
| 360 | £5,810 |
| 400 | £6,456 |
| 500 | £8,070 |
| 800 | £12,912 |
| 1200 | £19,368 |
| 2000 | £32,280 |
| Mean number of guests: 635 | £10,249 |

¹Numbers of staying guests provided by accommodation suppliers during primary data collection.

Table 72: Potential income generation from accommodation spend.

As Table 71 and Table 72 illustrate, even modest visitor numbers can represent important sources of income, both for local economies and individual visitor attractions. If visitors stay overnight, then income potential is increased, as further to accommodation spend is the daily spend attributed to staying visitors. The combined potential income generation attributable to overnight staying visitors is detailed in Table 73.

| Number of staying guests¹ (per year) | Potential accommodation income (@ mean £16.14 per night per visitor) | Potential associated daily visitor spend per year (@ mean £7.39 daily visitor spend) | Combined potential spend attributable to staying visitors. |
|---|--|--|---|
| 50 | £807 | £370 | £1,177 |
| 100 | £1,614 | £739 | £2,353 |
| 200 | £3,228 | £1,478 | £4,706 |
| 250 | £4,035 | £1,848 | £5,883 |
| 300 | £4,842 | £2,217 | £7,059 |
| 360 | £5,810 | £2,660 | £8,470 |
| 400 | £6,456 | £2,956 | £9,412 |
| 500 | £8,070 | £3,695 | £11,765 |
| 800 | £12,912 | £5,912 | £18,824 |
| 1200 | £19,368 | £8,868 | £28,236 |
| 2000 | £32,280 | £14,780 | £47,060 |
| <i>Mean number of guests: 635</i> | <i>£10,249</i> | <i>£4,693</i> | <i>£14,942</i> |
| <i>Per visitor</i> | <i>£16.14</i> | <i>£7.39</i> | <i>£23.53</i> |

¹Numbers of staying guests provided by accommodation suppliers during primary data collection.

Table 73: Potential spend of overnight staying visitors per 24 hour period.

The combined spend of £23.53 per visitor illustrated in Table 73 is less than that noted by Mills *et al.* (2000) at £33.24, although they consider this to be a rough estimate. Such a discrepancy may be accounted for by the longer visit duration, at an average of 7.24

nights, noted by Mills *et al.* within Somerset. The length of such stays suggests traditional holidays. This compares to the weekend, short-break - three-night visits which comprise the greater proportion of staying visits noted during this current research, at 55.2% of staying visits, compared to 30% of staying visits within Somerset overall (Mills *et al.* 2000). The longer holidays noted by Mills *et al.* (2000) possibly comprise family holidays, and thus greater expenditure on day-to-day activities and supplies, particularly with respect to the demands of children. In this current research, however, children comprise 10.8% of paying, staying visitors, and 13.7% of overall visitors, and thus contribute less of a demand on visitor expenditure.

Table 73 further shows that the total spend per visitor of overnight staying visitors is potentially three times greater than that of day-visitors alone, a similar observation being noted by Alexander and McKenna (1998) and Bryan *et al.* (2004) with respect to proportions of tourism expenditure. However, accommodation spend relies on accommodation being available in the first instance. As noted by Rotherham *et al.* (2002b), accommodation within the Humberhead Levels is limited, and thus in such circumstances, day-trip visitors are likely to provide the greater proportion of overall visitor expenditure.

Visitor spend in conjunction with visitor numbers has implications for employment potential within localities adjacent to visitor attractions. Such considerations are discussed in section 5.3.2.

4.4.13.1. Potential visitor income importance and comparisons.

The data presented above are informative in their own right, as an illustration of potential visitor spend attributable to a relatively low number of visitors. Such data placed and viewed proportionately within the context of local agricultural and other rural economies further illustrate the potential importance of nature-based recreation and leisure within the case study regions. Similarly, such data viewed in context to other, better known visitor attractions enable comparisons to be made. They allow the relative importance of visitor income generated within the case study regions to be assessed. However, such comparisons are difficult due to factors such as the multiple-Local Authority and other boundaries encompassed within the Humberhead Levels and Fens making regional case study-specific data collection difficult, as opposed to Local

Authority regional data collection. Comparisons so made would likely as not rely on an excess of assumptions. As such, the applicability of any such comparisons would be reduced and therefore open to question. In order to undertake such comparisons and to limit the use of unnecessary assumptions, further, more detailed economic data and analysis would be required, and as such is beyond the scope of this research.

4.4.14. Opportunities to spend.

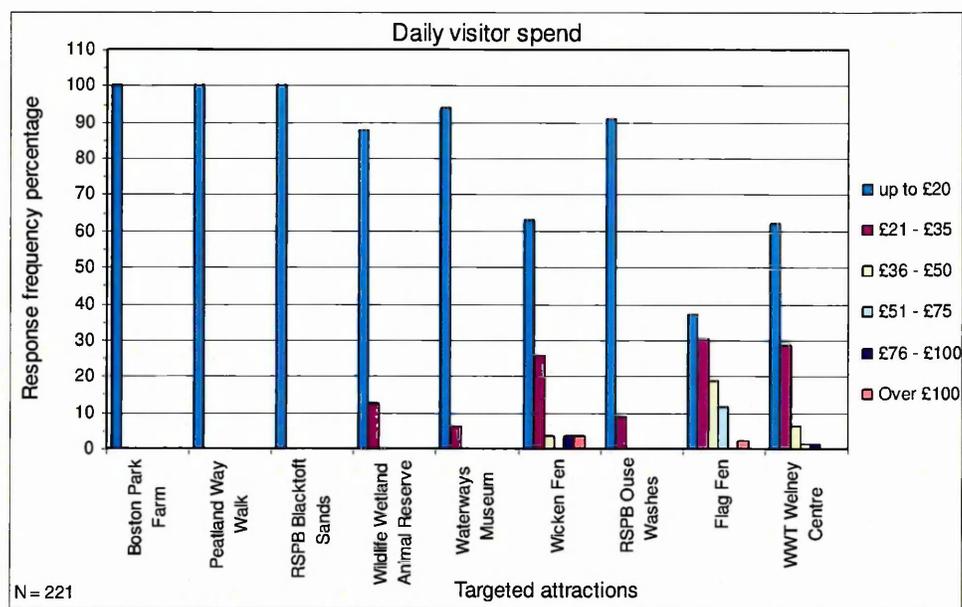
With respect to visitor spend, visitors must have the opportunity to spend. Whilst costs such as transport costs may well be attributable to home locations, at the very least within visitor destination regions, visitors will require basic facilities such as cafés and shops to purchase snacks. Without such opportunities to spend money, not only will economic potential be reduced, but the area in question may give the appearance of being uninteresting with a lack of things to do, and thus appeal to a limited visitor market. Furthermore, with respect to overall income generation at visitor attractions, in studies conducted by Rotherham *et al.* (2005a), income generated from on-site, secondary 'attractions', i.e. cafés and shops, in some instances almost equalled that of the primary attraction, and was therefore vital to the overall visitor business. Thus, in terms of income generation and business viability, enhanced opportunity to spend at on-site, supporting and secondary 'attractions' may not only be vital to the business operation, but also contribute further to local economies in terms of potential employment and the sale of local products.

Graph 42 and Table 74 detail visitor spend at visitor attractions surveyed. Whilst the majority of all spend is within the 'up to £20' category, it can be seen that visitor spend within the Humberhead Levels is limited compared to that within the Fens. Whilst there will be many reasons for variations in visitor spend, within the Humberhead Levels-based attractions, opportunity to spend is limited in comparison to the Fens. Excluding any admission charges, two of the attractions, the Waterways Museum and Wildlife Wetland Animal Reserve, have opportunities to spend in terms of cafés, Boston Park Farm has limited spend opportunities in terms of drinks and ice-creams, whilst RSPB Blacktoft Sands has no café or shop of any kind. This low spend opportunity at RSPB Blacktoft Sands is mirrored by RSPB Ouse Washes within the Fens, a reserve similarly with no opportunity to spend. By comparison, the remaining Fen attractions provide

much greater spend opportunities: Flag Fen, Wicken Fen and WWT Welney all have facilities for hot food and drink, along with souvenir and gift shops. Goods for sale range from books to food products, whilst Wicken Fen also provides an outlet for work produced by local artists, from which a 30% commission is taken for work sold (PACEC, 2004). Wicken Fen, Flag Fen and WWT Welney also provide opportunities to undertake courses, thereby increasing visit duration and the likelihood of spend.

Clearly, therefore, these latter attractions are more geared towards obtaining visitor income in a pro-active manner, and as such, have a greater propensity to encourage economic benefits within adjacent local economies. Thus, within the context of the research remit to evaluate the potential for nature-based recreation and leisure as income generators, 'high-spend' sites such as Wicken Fen and WWT Welney offer illustrations of what could be achieved within the Humberhead Levels with respect to encouraging visitors to spend. By comparison, 'low-spend' attractions such as RSPB Blacktoft Sands and Ouse Washes, whilst important in attracting visitors overall, do not encourage spend, and, due to their lack of facilities, may also not encourage repeat visits by the more generalist visitor, with implications for reduced visitor spend.

It should be noted that Wicken Fen, Flag Fen and WWT Welney and the RSPB reserves are attractions operated by national organisations, and whilst nominally 'independent', have considerable support resources and the benefits of economies of scale in terms of marketing and overall management through their parent organisation, be it a local council or national charitable body. Boston Park Farm and Wildlife Wetland Animal Reserve, on the other hand, are operated by private individuals, and thus have more limited resources, with consequences for what they can offer visitors, dependant as they are on income from private sources.



Graph 42: Visitor spend by targeted attraction.

| Region | Visitor Attraction | up to £20 | £21 - £35 | £36 - £50 | £51 - £75 | £76 - £100 | Over £100 | Total |
|-------------------|---------------------------------|-----------|-----------|-----------|-----------|------------|-----------|-------|
| Humberhead Levels | Boston Park Farm | 9 | | | | | | 9 |
| | Peatland Way Walk | 8 | | | | | | 8 |
| | RSPB Blacktoft Sands | 22 | | | | | | 22 |
| | Wildlife Wetland Animal Reserve | 7 | 1 | | | | | 8 |
| | Waterways Museum | 15 | 1 | | | | | 16 |
| Fens | Wicken Fen | 17 | 7 | 1 | | 1 | 1 | 27 |
| | RSPB Ouse Washes | 20 | 2 | | | | | 22 |
| | Flag Fen | 16 | 13 | 8 | 5 | | 1 | 43 |
| | WWT Welney Centre | 41 | 19 | 4 | 1 | 1 | | 66 |
| | <i>Total</i> | 155 | 43 | 13 | 6 | 2 | 2 | 221 |

Table 74: Visitor spend by targeted attraction.

4.4.14.1. Opportunity to spend - an off-putting factor?

The opportunity to spend, however, is not always an attraction. Rotherham *et al.* (2002b) report that visitors to RSPB Blacktoft Sands like the opportunity of not having to spend, or not being encouraged to spend, at the RSPB reserve in order to enjoy themselves, simply because they may not have the funds to do so. Attractions that encourage excessive spend may possibly be off-putting to those of limited means, particularly with respect to families with children. Whilst RSPB staff at Blacktoft Sands note that such visitors probably contribute to local economies through the use of local shops, such contributions are based around food and fuel purchases as opposed to souvenirs, and are thus more necessities rather than non-necessary purchases.

4.4.15. Cross-visits and attraction variety: increased opportunities for spend?

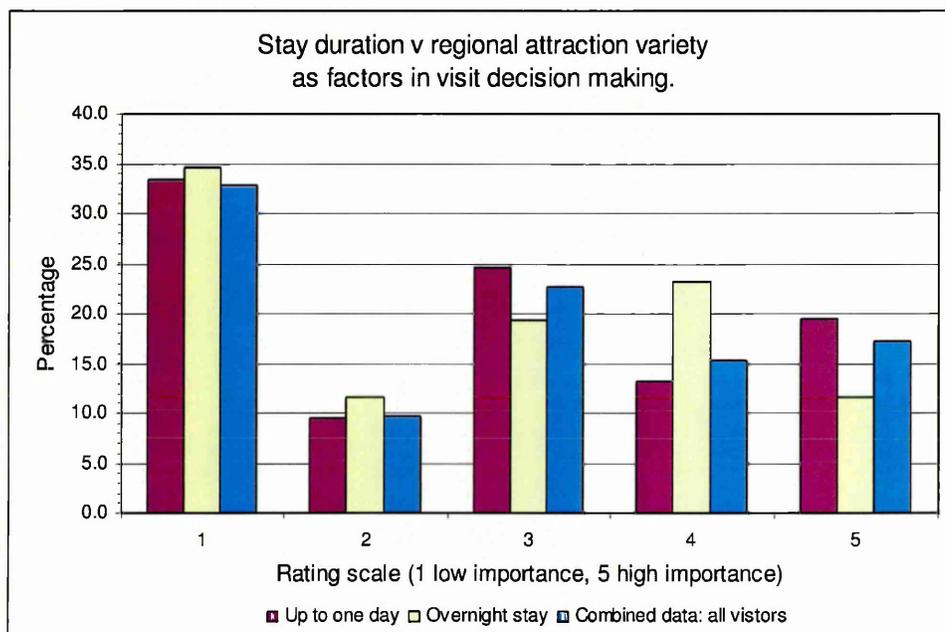
In order to generate income and maintain business viability, visitor spend must be encouraged. That tourism and visitor flows are linked to retail activity and merchandise is a well understood phenomenon, with numerous examples of visitor attractions being developed and associated with specific retail activity, such as waterfront development and speciality shopping in Liverpool (Dudding and Ryan, 2000). The use of such facilities by visitors and non-visitors alike (Egan and Nield, 2003) further illustrates the wider, 'shared' economic and social benefits that are potentially available in developing visitor attractions. Although there are issues as to the potentially exaggerated benefits accrued solely to tourism development in respect of this (Egan and Nield, 2003), nonetheless encouragement to spend is an important factor in visitor attraction viability.

In considering increased visitor spend, Downward and Lumsdon (2000 & 2003) suggest that attractions themselves do not necessarily encourage increased spend, but that visitor party size and stay duration does. The longer the visit, the more likely food, drink and other purchases will be made. Dudding and Ryan (2000) note that spend on merchandise can exceed that of admission fees. Thus, to encourage visitor spend, visitors should be encouraged to stay longer at attractions, and the most appropriate type of visitor should be encouraged, i.e. larger visitor parties, families and more affluent visitors. Such issues have considerations for policy and visitor attraction development.

In support of this, the Macaulay Institute (2003) suggest that spend on day visits that combine several activities generally results in increased spend, Table 70. PACEC (2004) comment on the benefits of cross-marketing with respect to National Trust properties within the vicinity of Wicken Fen, and logic would suggest an increased variety of attractions within an area would encourage visits in the first instance, and longer visits once within the locality, and therefore greater spend. Whilst this might be true for those on longer holiday visits, with respect to this research and the propensity for day visits, the data suggests that a variety or cluster of visitor attractions within the study regions is less than important in the process of deciding to visit the study regions. Although 78.3% of visitors indicated visiting other attractions within the study regions at some time, covering a generic range of attractions and activities, the importance of a mix of attractions within the study regions as a factor in deciding to visit was

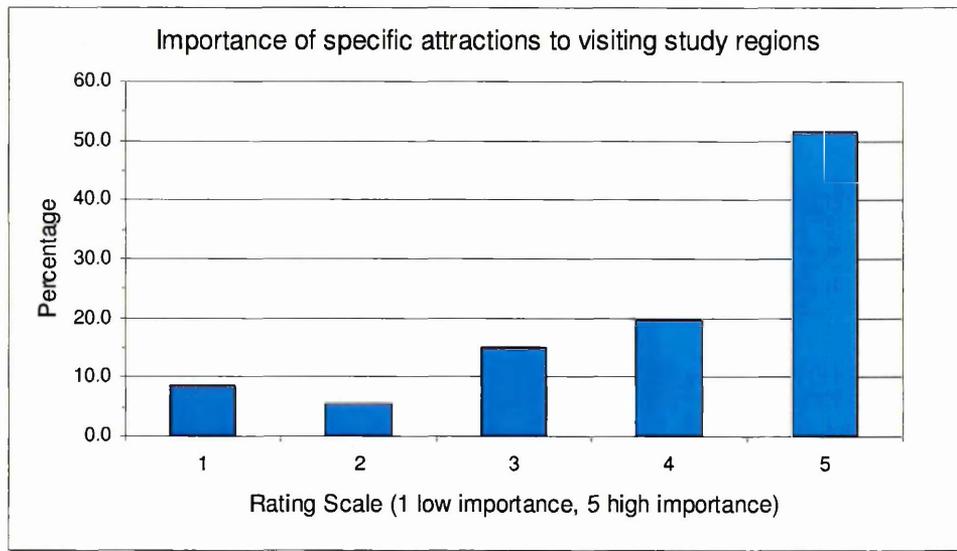
ambivalent at best. 33.3% of visitors overall considered a variety of attractions unimportant, rising to 49.1% for the Humberhead Levels. Further analysis shows that stay duration has little effect on the importance of attraction variety as a factor in visit decision making, with similar ratings in all categories, excepting Rating 4, at which point 23.1% of overnight staying visitors indicate attraction variety as of some importance, Graph 43.

Such findings appear to be contrary to the beliefs of those who operate visitor attractions, with the majority of attraction operators considering a variety of attractions within their local area or region important (section 5.1.8.).



Graph 43: Stay duration and regional attraction variety in visit decision making.

The importance of the targeted attractions as factors in visit decision making, however, is clearly demonstrated in Graph 44. The majority of visitors, 51.4%, indicate a high importance rating for the attraction visited, with a further 19.7% indicating importance levels at Rating 4 on a Likert scale. For individual wildlife attractions, indicated high importance ratings, i.e. Rating 5, are predominately over 40.0% of responses, Table 75.



Graph 44: Importance of specific attractions as factors in visit decision making.

| Region | Attraction | Rating 5, high importance | Sample size (N) |
|--------------------------|---------------------------------|---------------------------|-----------------|
| Humberhead Levels | Boston Park Farm | 42.9% | 7 |
| | RSPB Blacktoft Sands | 77.3% | 22 |
| | Wildlife Animal Wetland Reserve | 37.5% | 8 |
| | Waterways Museum | 27.8% | 18 |
| Fens | Wicken Fen | 50.0% | 28 |
| | RSPB Ouse washes | 66.7% | 27 |
| | Flag Fen | 43.9% | 41 |
| | WWT Welney Centre | 55.1% | 69 |

Table 75: Importance of targeted attractions in visit decision making.

With respect to the high proportion of day-trip visitors, and in consideration of the distances visitors travel (section 4.1.1.), many visitors would perhaps have only enough time and desire to visit one attraction. The day-trip duration, distances travelled, and the enthusiasm often displayed for activities such as bird watching, suggests that visits are for one purpose only, which is met by visiting one attraction. Hence the importance placed on individual attractions within Table 75. Whilst a small proportion of visitors commented that they were intending to visit both WWT Welney and RSPB Ouse Washes within the same day, the actual activities undertaken at these two sites, bird watching, is the same, with the main difference in sites being the provision of a café and shop at WWT Welney, and therefore an opportunity to spend.

Further to this is the proportion of local visitors identified (section 4.1.3.). With such proportions of local visitors, a mix of attractions is perhaps less important. As locals and therefore living within the visitor destination region, a mix of attractions within the

region as a visitor draw is of little consideration for them. However, whilst such observations are pertinent to locals and those visitors surveyed at predominantly wildlife attractions, and thus often visitors of a more specialist interest, less specialised visitors may prefer a mix of attractions and activities to pursue, whether local or otherwise.

4.4.16. Conclusion.

From the visitor data collected, principally from the Fens and Humberhead Levels, it can be seen that day-visitors predominate over overnight staying visitors by a ratio of 3:1. Furthermore, within the day-visitors identified and depending on definitions of 'local' used, a potentially high proportion of visitors are local visitors. Such proportions have implications with respect to demand on visitor facilities, and thus policy decisions with respect to further development of the visitor market. With this consideration, it should be noted however that whilst day-visitors predominate, this is not to the exclusion of overnight staying visitors as important contributors to local economies, and a potential visitor market to be developed should visitor demand increase. As the visitor spend data illustrates, those staying in paying accommodation spend a mean of £16.14 per person per night as well as their daily spend, and thus per person, staying visitors are likely to spend more. However, with day-visitors being predominant at 75% of visitors, and a significant number of staying visitors being non-paying overnight staying visitors, courtesy of family and friends, days visitors comprise the mainstay of economic contributions to local economies, as noted in other visitor studies (National Trust, 2001; Mills *et al.*, 2000; PACEC, 2004; Bryan *et al.*, 2004). As such, the potential economic contributions of day visitors are discussed in greater detail in Chapter Six. Furthermore, with definitional discussions related to tourism and what constitutes a tourist noted within the literature review (Chapter Two), in conjunction with issues associated with 'local' and economic considerations of local spend also discussed, factors so identified have considerations for the research findings. These are considered in greater detail within the research discussion, (Chapter Six).

The identified mean daily visitor spend of £7.39, whilst not particularly high, is nonetheless similar, and in some cases considerably higher, in relation to other studies of a similar nature: i.e. studies with a nature-based or rural context (Rayment *et al.*,

2000; PACEC, 2004; Rayment, 1997; Midmore, 2000; Macaulay Institute, 2003). The mean daily spend per visit also concurs and exceeds that of the GB Day Visits Survey (Anon., 2004), depending on the classification of the visit type: all leisure day-trips, countryside leisure day-trip, all tourism day-trips or tourism countryside day-trips. Thus in this respect, the research data collected concurs with existing studies and the findings therefore have grounding within the context of nature-based related studies.

In consideration of the mean daily visitor spend and visitor number data supplied by visitor attractions, the calculated, potential visitor income generated is, in many instances, relatively low. Whilst this might seem contrary to the aims of tourism development as an economic regeneration tool (Sharpley, 2000), particularly in respect of high profile, high visitor demand, flagship attraction development, as noted within Chapter Two and discussed in the context of the research findings in Chapter Six, nonetheless, such visitor spend will have benefits for local economies. As such, it could have been expected that visitors require a mix of attractions within their chosen destination region in which to visit, and thus at which to spend. However, the data suggests that many visitors, being day-trip visitors, are singular in their visit aims, with often only one attraction being visited on the day of the visit. A mix of attractions within the destination regions is therefore considered less important by visitors. With this noted, visitors therefore require the opportunity to spend at their chosen attraction, without which economic benefits will be limited. The importance of this with respect to income generation at an attraction is clearly demonstrated with respect to those attractions that have cafés and shops, and thus opportunity for visitors to spend, and those that don't, Table 74 and Graph 42. Greater spend occurs at visitor attractions with cafés and shops. Such considerations have implications for potential visitor demand, recreation business turnover and viability, and employment potential, and thus income retention within local economies. With respect to such factors, and in consideration of the limitations associated with economic impact studies highlighted by the literature review (Chapter Two), data obtained from recreation business surveys within the case study regions are analysed and discussed in the following chapter (Chapter Five). The importance of visitor income so identified with respect to farm and rural viability is discussed further in Chapter Six, placed within the context of the wider research findings.

Chapter Five: Data Analysis and interpretation - Recreation Business surveys.

5.0.1. Introduction.

Undertaken in parallel with the distribution of visitor surveys (section 3.4.0.), the distribution of recreation business questionnaires and subsequent collection and analysis of data was undertaken during the summer and autumn of 2004. Analysed using SPSS and Excel programmes, and supported by thematic analysis, the results of the data collected are presented below and discussed in sections 5.2.0. and 5.3.0. Supporting data are presented in the Appendix Two. Figure 9 illustrates the link between data obtained during recreation business and visitor surveys, and the subsequent informing of the research process and findings.

5.0.2. Recreation business surveys: useable survey response rate.

As Table 15 shows, the return rate for the recreation business surveys is 29.5%. However, amongst those questionnaires returned were several that proved to be insufficiently completed to be of use in the research, and thus were discounted from the analysis in their entirety. Thus the actual return rate differs from, and is greater than, the useable return rate, and is detailed in Table 76.

| Region | Questionnaires distributed | Questionnaires returned | Actual return rate | Useable questionnaires returned | Useable return rate |
|-------------------------|----------------------------|-------------------------|--------------------|---------------------------------|---------------------|
| Humberhead Levels | 65 | 18 | 27.7% | 16 | 24.6% |
| The Fens | 70 | 22 | 31.4% | 20 | 28.6% |
| Somerset Levels & Moors | 75 | 22 | 29.3% | 21 | 28% |
| <i>Total</i> | <i>210</i> | <i>62</i> | <i>29.5%</i> | <i>57</i> | <i>27.1%</i> |

Table 76: Comparison between actual and useable recreation business questionnaire return rate.

Although this reduced, useable return rate of questionnaires does reduce the validity of the survey by a margin of 2.4%, nonetheless, the survey produced data that enables the importance of leisure and recreation to local businesses and communities to be assessed, particularly with respect to descriptive, qualitative data. Due to the limited number,

fifty-seven, of useable surveys returned, statistical analysis potential is limited. Furthermore, within the returned surveys, not all questions have been answered, thus the sample value, N, varies depending on the question. Such variance will be noted accordingly. As a consequence of these factors the statistical validity and reliability is likely to be reduced. Therefore, the quantitative information is used to support the more informative qualitative data obtained.

5.0.3. Identification and survey participation of recreation businesses.

The identification of recreation businesses and the subsequent distribution of questionnaires was subject to locating the recreation business and the owner choosing to take part in the survey. Thus, the data obtained from these samples are unlikely to be fully representative of the recreation businesses, being more dependant on the willingness of business owners to respond to the survey. That a particular sector of recreation businesses responded more than another may reflect a higher number of such businesses in the survey regions, and thus a higher distribution of questionnaires to that sector. Alternatively, the owners of such businesses may perceive potential benefits to their business and sector, in light of the Countryside Agency's involvement in the research, and thus are more willing to complete the questionnaire. Furthermore, those businesses involved within the accommodation sector probably view themselves as being a visitor or tourist related business, and thus respond to the questionnaire. Other businesses, e.g. wildlife, conservation or fishing-related businesses, may not consider themselves involved within the visitor and tourism sector, and thus do not respond to what they perceive as an unrelated tourism questionnaire. Table 77 details the approximate number of questionnaires distributed to each sector, and the numbers returned.

| Recreation business sector | Questionnaires left | | Questionnaires returned | % returned per sector | % returned overall |
|---|---------------------|-------------|-------------------------|-----------------------|--------------------|
| | Number | % | | | |
| Agricultural/farm-based (not accommodation) | 8 | 3.8% | 2 | 25.0% | 1.0% |
| B&B/Guesthouse | 48 | 22.9% | 19 | 39.6% | 9.0% |
| Caravan/camping site | 25 | 11.9% | 5 | 20.0% | 2.4% |
| Fishing/water sports/boat-related | 30 | 14.3% | 5 | 16.7% | 2.4% |
| Hotel | 10 | 4.8% | 1 | 10.0% | 0.5% |
| Mix of attractions/ ¹ other | 56 | 26.7% | 10 | 17.9% | 4.8% |
| Museum/heritage/culture | 13 | 6.2% | 6 | 46.2% | 2.9% |
| Pub/inn/café | 3 | 1.4% | 3 | 100.0% | 1.4% |
| Self-catering/holiday cottage | 8 | 3.8% | 4 | 50.0% | 1.9% |
| Wildlife/natural history | 9 | 4.3% | 2 | 22.2% | 1.0% |
| <i>Useable Total</i> | <i>210</i> | <i>100%</i> | <i>57</i> | <i>27.1%*</i> | <i>27.3%*</i> |

NOTE: figures approximate owing to many businesses undertaking several visitor activities.

*Discrepancy due to rounding up of figures.

¹'Other' includes attractions such as cider orchards, basket weaving/arts & crafts outlets, PYO fruit, golf clubs, light railways.

Table 77: Recreation business questionnaires distributed and returned in each recreation business sector.

As can be seen in Table 77, the accommodation sector returned the most questionnaires, particularly within the B&B/guesthouse sector. This will be reflected, and should be noted, within the study results.

5.0.3.1. The survey sample as a proportion of the overall recreation business population.

Further to the number and representativeness of the recreation businesses surveyed, it should be noted that the potential, maximum number of recreation businesses available to be surveyed within the case study regions is unknown. Communications with Fens Tourism indicated that the number of visitor attractions advertising within their 2004 visitor guide (Fens Tourism, 2004), at forty-five accommodation suppliers and thirty-eight other visitor attractions, accounts for the majority of visitor attractions known to them, although the actual number likely exceeds this. Whilst data regarding the number of visitor attractions and facilities within the Somerset Levels and Moors is unknown, within Somerset county as a whole, approximately 250 visitor attractions and facilities are noted (pers. comm, Somerset Levels and Moors Partnership, 18/10/2005). No such current data are available for the Humberhead Levels, excepting those identified within Rotherham *et al.* (2002b) at around thirty-eight visitor attractions and facilities. Nonetheless, the number of recreation businesses surveyed within each region during this research, Table 76, comprises at the minimum 26% of the attractions known to

Somerset County Council. With the Somerset Levels and Moors comprising an area much smaller and without the coastal attractions of Somerset county, the ratio of attractions surveyed to those not surveyed is undoubtedly higher. In respect of the Fens, the number of surveyed attractions equates to an approximate 84% of attractions known to Fens Tourism. By way of comparison, SWLFP (2003) selected a survey sample of 210 from a potential population of around 1500, the survey sample equating to 14% of the overall target population of local food producers.

The type and nature of many recreation businesses therefore precludes any definitive total count, with many businesses neither registered on tourism organisation lists nor advertising widely. Consequently, quantifying the survey sample population as an accurate proportion of wider recreation business population is impractical. Such issues are noted further in section 5.2.5.1. with respect to the undertaking of statistical analysis.

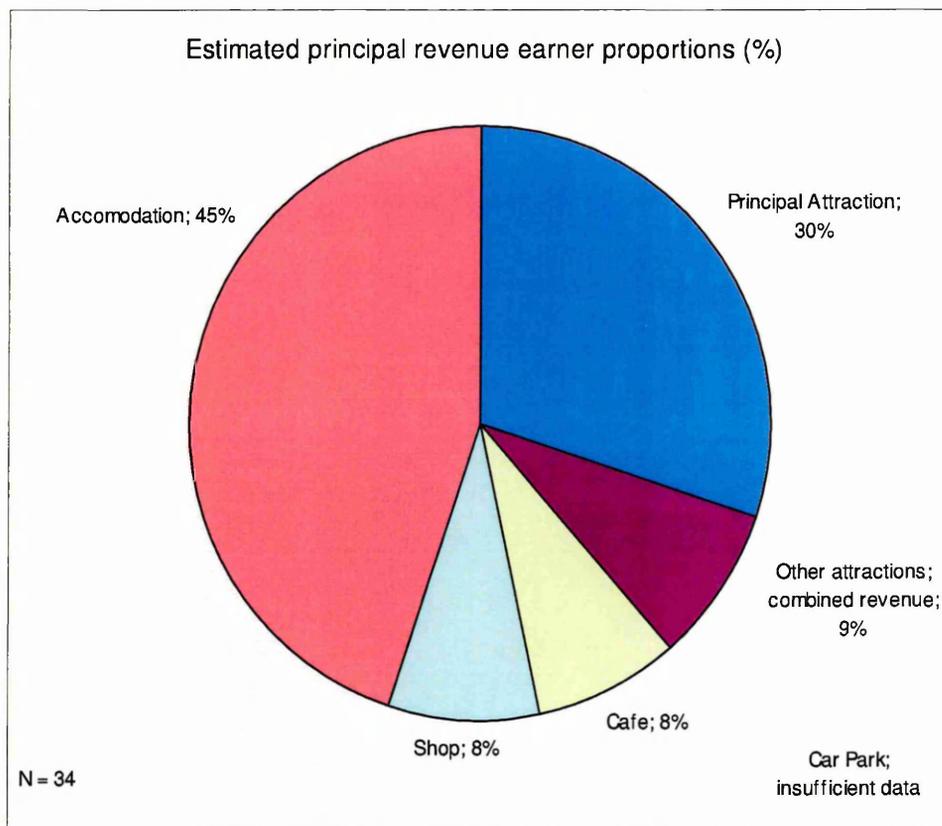


Photograph 7: RSPB Ouse Washes, Manea, The Fens.

5.1.0. Section One: Results.

5.1.1. Identification of the principal revenue earner at recreation businesses.

Although the principal revenue earner at a visitor attraction is assumed to be the primary attraction, this is not always so. Rotherham *et al.*, (2005a) detail examples where supporting attractions and visitor facilities generate as much visitor income as the primary attraction. Thus, with respect to assessing this potential, recreation businesses were asked for details of the principal revenue earning facility of their business, be it accommodation, shop, car-park or other facility. From data collected, accommodation is shown as being the main income earning facility, Graph 45. However, this is perhaps due to the high number of accommodation-related questionnaires returned. Other than accommodation, the data obtained demonstrates that the main or primary attraction is the main income generator, as to be expected. Several recreation businesses, however, indicated that more than one category provided their main source of income. The question was originally asked with the intent of identifying secondary facilities that generated greater income than the primary attraction. However, due to the manner of question completion, the resultant data obtained has negated this intent.



'Other attractions' excludes café, shop & accommodation.

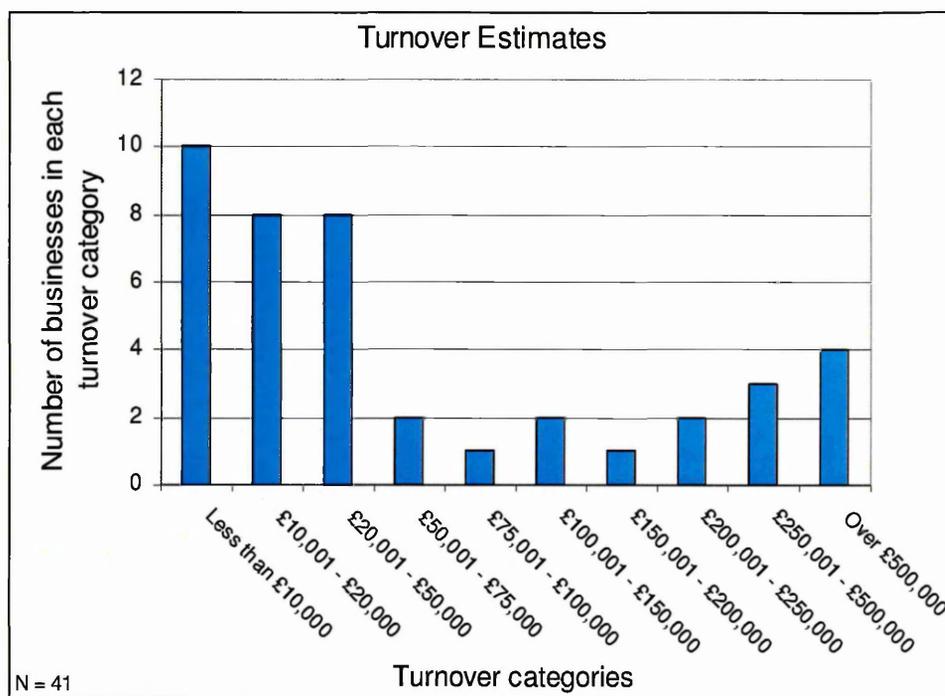
Graph 45: Estimated principle revenue earner by proportion.

5.1.2. Estimations of recreation business turnover.

As an indication of the throughput of finance within recreation businesses, the survey asked for an estimation of business turnover, based on a range of turnover categories, Table 78. Graph 46 illustrates the number of businesses within each turnover category.

| | | | | |
|------------------|-----------------|-------------------|-------------------|-------------------|
| less than 10,000 | 20,001 - 50,000 | 75,001 - 100,000 | 150,001 - 200,000 | 250,001 - 500,000 |
| 10,001 - 20,000 | 50,001 - 75,000 | 100,001 - 150,000 | 200,001 - 250,000 | over 500,000 |

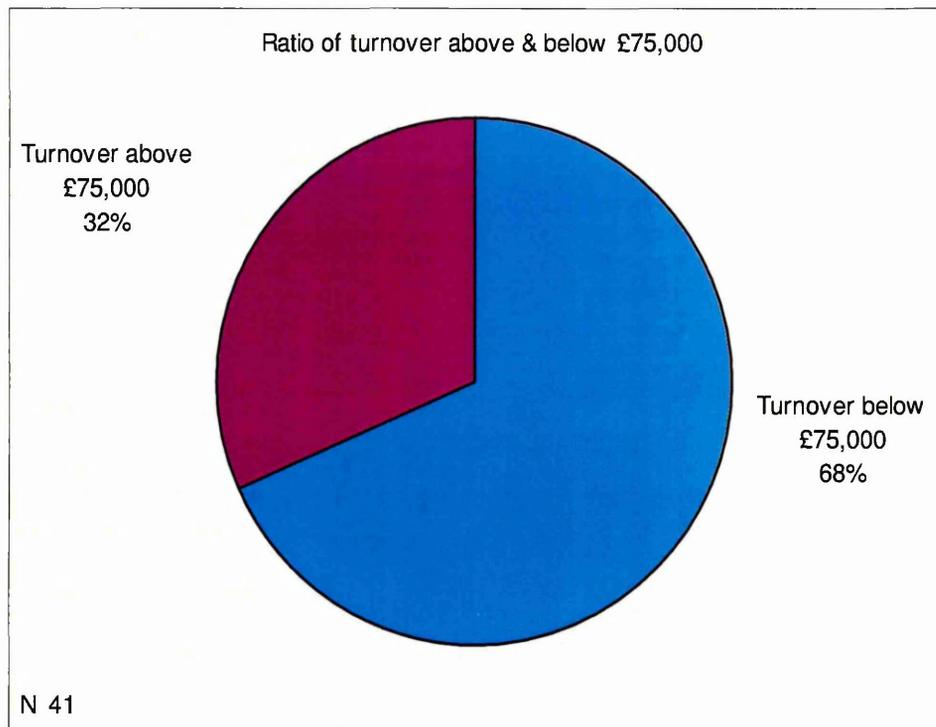
Table 78: Recreation business questionnaire turnover categories (£).



Graph 46: Turnover estimates of surveyed recreation businesses.

Whilst not an indicator of the profitability or longevity of a business, turnover was seen as a way of assessing recreation businesses as conduits of money. Turnover is an illustration of overall income and expenditure, and thus exemplifies monetary flows associated with a business. Profit, on the other hand, can be deliberately and legitimately reduced to avoid, for example, tax payments. As such it is a less reliable estimate of monetary flows. Furthermore, many businesses are reluctant to divulge profit margins, these normally being the preserve of accountants and tax departments. In this respect, turnover estimates are more applicable to the research than profit values.

Factors such as business income and expenditure could have implications for local communities, particularly in relation to employment and the use of local services and produce, and the retention of income within local communities. However, many factors will influence the collection, distribution and measurement of turnover-related finance, and such factors are noted in sections 2.3.0. and 3.4.9.2. Furthermore, a high turnover is not an indication of greater importance than a low turnover. Of critical importance to this research is how important the turnover derived from a recreation-related business is in maintaining local community viability, and in the maintenance of a landscape attractive to visitors.



Graph 47: Ratio of business turnover above & below £75,000

Whilst Graph 46 illustrates a broad spread of turnover estimates, Graph 47 shows that 68%, or twenty-eight of forty-one, of the surveyed recreation businesses have a turnover of less than £75,000. Furthermore, 25% of the recreation businesses have a turnover of less than £10,000. As such, and with the possible exception of those businesses indicating a turnover in excess of £500,000, no actual turnover figures being given, the businesses surveyed not only fall within the category of 'small enterprises' with respect to turnovers being equal to or below €10 million (£6.8 million), as defined by the European Commission (2005), but also fall within the category of 'micro enterprises' due to turnovers being equal to or below €2 million (£1.36 million)⁹. As small and micro enterprises, such businesses are eligible for numerous forms of state aid (European Commission, 2005) which, from the perspectives of business start-up, operation, and policy development, may be of importance in considering the establishment and development of a visitor market and associated facilities within the Humberhead Levels.

⁹ Exchange rate calculated at £1 = €1.47 as at 6/10/2005. Sourced from www.trustnet.com/general/rates.asp on 8/10/2005.

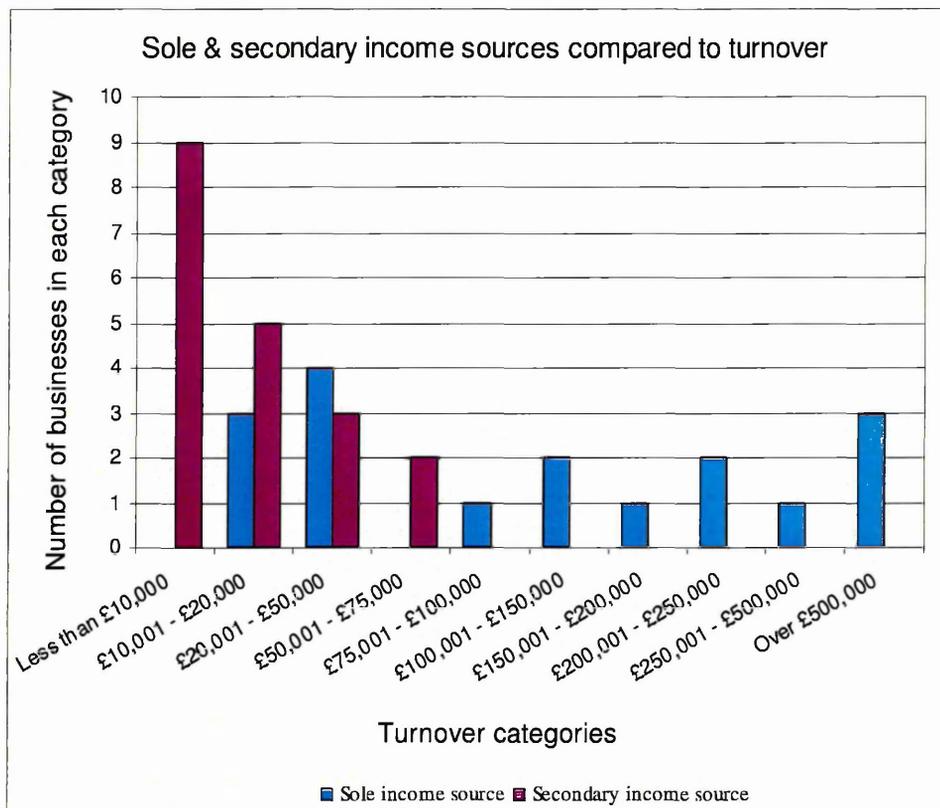
5.1.2.1. Turnover comparisons of single and multiple-income sourced recreation businesses.

In themselves, however, such turnover figures as detailed above illustrate little, the potential reasons for high or low turnover being many and varied. However, when compared to the numbers of recreation businesses that have a single income source or multiple income sources, it can be seen that all business involved in visitor recreation as a secondary source of income have turnovers of less than £75,000, as illustrated in Table 79* and Graph 48*. Furthermore, nine of a total of nineteen (47%) of these businesses have a turnover of less than £10,000. By comparison, those businesses for whom visitor spend is the only source of income are spread more evenly across the turnover estimate categories.

| Turnover estimate categories | Number of recreation businesses in each turnover category | |
|--------------------------------|---|-------------------------|
| | Single income source | Secondary income source |
| Less than £10,000 | 0 | 9 |
| £10,001 - £20,000 | 3 | 5 |
| £20,001 - £50,000 | 4 | 3 |
| £50,001 - £75,000 | 0 | 2 |
| £75,001 - £100,000 | 1 | 0 |
| £100,001 - £150,000 | 2 | 0 |
| £150,001 - £200,000 | 1 | 0 |
| £200,001 - £250,000 | 2 | 0 |
| £250,001 - £500,000 | 1 | 0 |
| Over £500,000 | 3 | 0 |
| <i>Total no. of businesses</i> | <i>17</i> | <i>19</i> |

N = 36.

Table 79: Number of recreation business in each turnover category relative to sole or secondary income sources.



*Owing to non-completion within the questionnaire, the N value for Table 79 and Graph 48 is 36, compared to N = 41 in Graph 46 & Graph 47.

Graph 48: Sole & secondary income sources compared to turnover estimates.

5.1.3. Sole income source and the importance of secondary income sources.

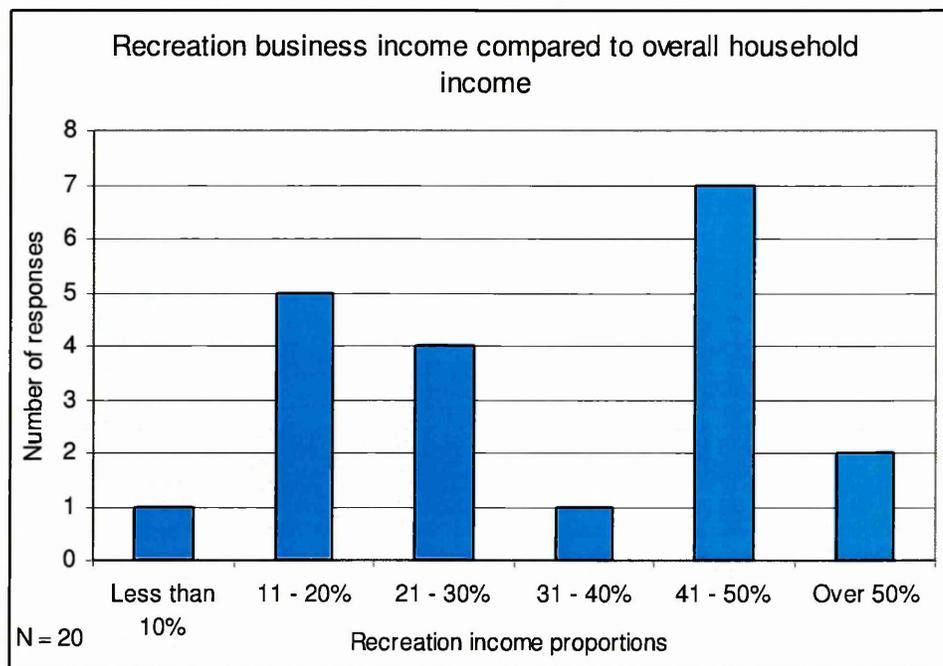
In common with all three regions surveyed, there is a mix of recreation businesses in which visitor spend-related income is the sole or secondary income source. For those businesses whose income is derived solely from visitor spend, clearly, such income is important and vital to the business existence. However, for businesses with secondary or multiple sources of income, the importance of this secondary income is less clear. Such an income source could be one part of a wider, multi-business portfolio, which on its own forms a less critical component of the wider portfolio. Alternatively, the secondary income, although small, may form a highly critical component of the wider business portfolio, upon which the existence of the wider business portfolio itself depends.

Of a total of forty-two responses, for twenty-one respondents the recreation-sourced income was the sole source of income. For the remaining twenty-one respondents, recreation-sourced income was a secondary form of income. Table 80 details the types

of businesses undertaken by those businesses whose sole income is derived from recreation and visitor-related spend. For businesses for whom recreation-sourced income is a secondary form of income, Graph 49 details the proportions of the recreation business-related income compared to the overall household income.

| Region | Business category | Count | |
|------------------------------------|--|--------------|-----------|
| Humberhead Levels | B&B/Guesthouse | 4 | |
| | Hotel (with golf course) | 1 | |
| | Narrow boat marina, moorings & chandlery | 2 | |
| Fens | Art studio | 1 | |
| | Boat marina/yard | 2 | |
| | Café/tea shop | 1 | |
| | Caravan & camping | 1 | |
| | Museum/historic | 2 | |
| | Other/non-specific | 1 | |
| Somerset Levels & Moors | B&B/Guesthouse | 2 | |
| | Caravan & camping | 1 | |
| | Farm shop | 1 | |
| | Garden centre/café | 1 | |
| | Willow craft centre | 1 | |
| Total | <i>Art studio</i> | <i>1</i> | |
| | <i>B&B/Guesthouse</i> | <i>6</i> | |
| | <i>Boat yards/marina/chandlery</i> | <i>4</i> | |
| | <i>Café/tea shop</i> | <i>1</i> | |
| | <i>Caravan/camping</i> | <i>2</i> | |
| | <i>Farm shop</i> | <i>1</i> | |
| | <i>Garden centre/café</i> | <i>1</i> | |
| | <i>Hotel (with golf course)</i> | <i>1</i> | |
| | <i>Museum/historic</i> | <i>2</i> | |
| | <i>Other/non-specific</i> | <i>1</i> | |
| | <i>Willow craft centre</i> | <i>1</i> | |
| | | <i>Total</i> | <i>21</i> |

Table 80: Business categories of sole income sourced recreation businesses.



Graph 49: Proportion of recreation-related income compared to overall household income.

Whilst Graph 49 suggests that the secondary, recreation-related income can represent a major proportion of overall household income, it is the importance of this income that is perhaps more telling, irrespective of its overall proportion to household income. Table 81 details the number of income-related questionnaire responses rated as important, not important and sole income, as well as the non-response rate.

| Region | Important | | Not important | | Sole income [#] (so important) | | No response | |
|--|-----------|-------|---------------|-------|--|--------|-------------|-------|
| Humberhead Levels (16 RBQ's) | 4 | 25% | 1 | 6.25% | 7 | 43.75% | 4 | 25% |
| Fens (20 RBQ's) | 6 | 30% | 0 | 0 | 8 | 40% | 6 | 30% |
| Somerset Levels & Moors (21 RBQ's) | 9 | 42.9% | 3 | 14.3% | 6 | 28.6% | 3 | 14.3% |

N = 57.

Importance rating scales in questionnaire: 1, low - 5, high. Scale of 3 and above rated as important.

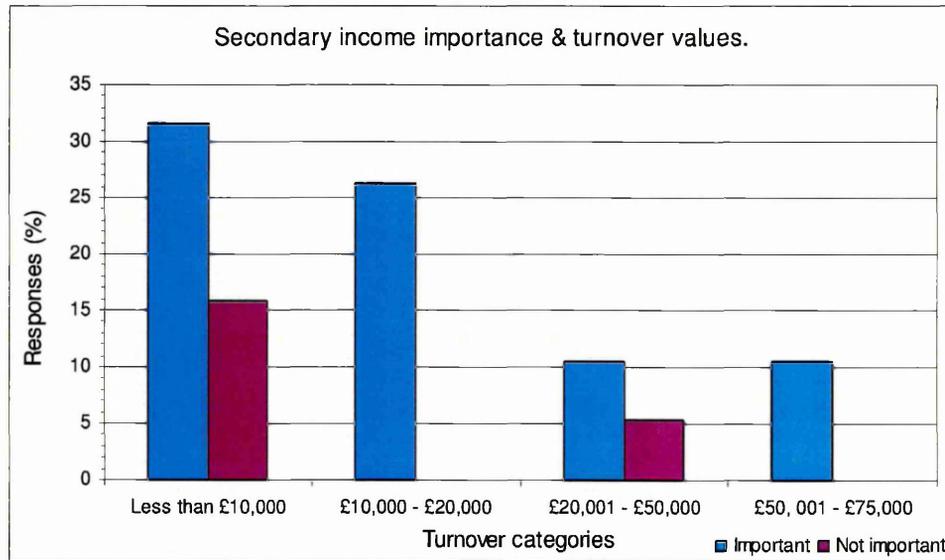
Table is a compilation of scaled and written responses.

[#]If visitor income is indicated as the sole income source, it is assumed to be important unless other information suggests otherwise (e.g. a B&B run as a retirement activity for extra income that is not vital to everyday life).

Table 81: Number and percentages of questionnaire responses detailing the importance of secondary, recreation-related income.

In response to questions concerning income within the questionnaire, the recreation-related income is often given and described as important, even though, when indicated as a percentage or turnover value, the actual percent or turnover indicated is quite low. This suggests that, even though possibly quite small, this secondary income is important

to household incomes. Descriptive and follow-up, qualitative responses suggest that this is so. Such income possibly pays for the 'fixed costs' and basic necessities that make living viable, and is possibly an indication of the importance of visitor income to the wider community. Graph 50 illustrates the turnover ranges from those businesses with visitor attractions as a secondary source of income, in association with their rating of important or not important. From Graph 50, it can be seen that, whilst below £75,000 turnover, the secondary incomes are generally considered important to household incomes.



N = 19.

Maximum secondary income turnover provided: £75,000.

Discrepancies within questionnaire responses not detailed in the graph;

3 responses provided with no turnover given, but identified as secondary income, and rated as 'important'.

1 response provided with no turnover given or indication of sole/secondary income, but rated as 'important'.

Graph 50: Importance of secondary, recreation-related income relative to turnover.

5.1.3.1. The importance of secondary, recreation-related income.

In assessing the importance of recreation-related income to households, those businesses surveyed were asked to descriptively detail the importance of the recreation-related income to their households, and what effect the loss of this income would have on the household. Table 82 details these qualitative responses whilst also detailing the primary or other sources of income. As can be seen, whilst there is a range of responses, such qualitative, descriptive comments illustrate the importance of recreation-related incomes as a secondary income source.

| Region | Visitor income; proportion of total household income. (% categories) | Response; secondary income importance to household | Scale rating 1 = low, 5 = high | Response; effect of secondary income loss on household | Main or other income source |
|-------------------------|--|--|-----------------------------------|---|---|
| Humberhead Levels | 20 - 30% | very, enables buying of food & clothes | 5 | drastically | arable farming |
| | 11 - 20% | very important | 2 | N/R | fabrication shop & wife works in a school |
| | N/R | N/R | 4 | it is vital that small farms diversify their business interests in order to survive | Farm letting |
| | 20 - 30% | very important needed for general living expenses | 5 | a marked effect on the family's living standard | arable & sheep farming on rented farm |
| | 20 - 30% | N/R | 1 | N/R | educational theatre group |
| Fens | 41 - 50% | important | 3 | N/R | wholesale of camping & caravan equipment |
| | N/R | N/R | 5 | probably couldn't live here | pension |
| | over 50% | very important | 5 | general running and everyday to day expenses of house | American stretch limo business |
| | 11 - 20% | very useful | 4 | other employment would be needed | partner runs conservation contracting business |
| | 41 - 50% | N/R | 5 | make things very difficult | farming |
| | 41 - 50% | to provide part-time wage to Mrs X and to supplement pensions due within 10 years realising the investment return in property prices | 5 | Mrs X would return to work as a cook and we would have no pension supplement | arable farming |
| Somerset Levels & Moors | N/R | as farming doesn't pay - the B&B & self-catering is a good source of income | N/R | go bankrupt | farming |
| | 41 - 50% | we wouldn't be here! Propping up the farm | 5 | Go bust! | land rent, farm, silage contracting, poultry |
| | 41 - 50% (50/50, between 2 income sources) | vital | 5 | we would have to sell the farm | working farm - sell long-straw wheat for thatching |
| | 11 - 20% | very important - as dairy farm & milk price is poor | 5 | profoundly | wife works full-time for a company as administrator as well as farm work & B&B. |
| | 11 - 20% | not important | 2 | not at all | pension |
| | N/R | very important as we have a dairy farm. We are selling the cows in the autumn as the income is not sufficient to cover the hours of work, therefore it is likely the holiday trade could become our primary income | 5 | we would not have sufficient income to support our family | currently dairy farming |
| | 20 - 30% | very | 4 | we could not keep the house | pension |
| | 31 - 40% | N/R | 3 | we would have less money | beef and arable farming |
| | 11 - 20% | it isn't | N/R | very little | pension |
| | 41 - 50% | N/R | 5 | all luxuries would disappear | farm |
| | 41 - 50% | important | 3 | it would cause damage | N/R |
| | less than 10% | not important. After paying out insurance. electrical checks and maintenance - we make very little | 1 | not greatly | both of us work in engineering and office |

Comments as written in questionnaire responses (excepting individual's names). N/R = no response.

Table 82: Details of the importance of secondary, recreation-related incomes to households, the potential effects of the loss of secondary income on households, and details of primary or other income sources.

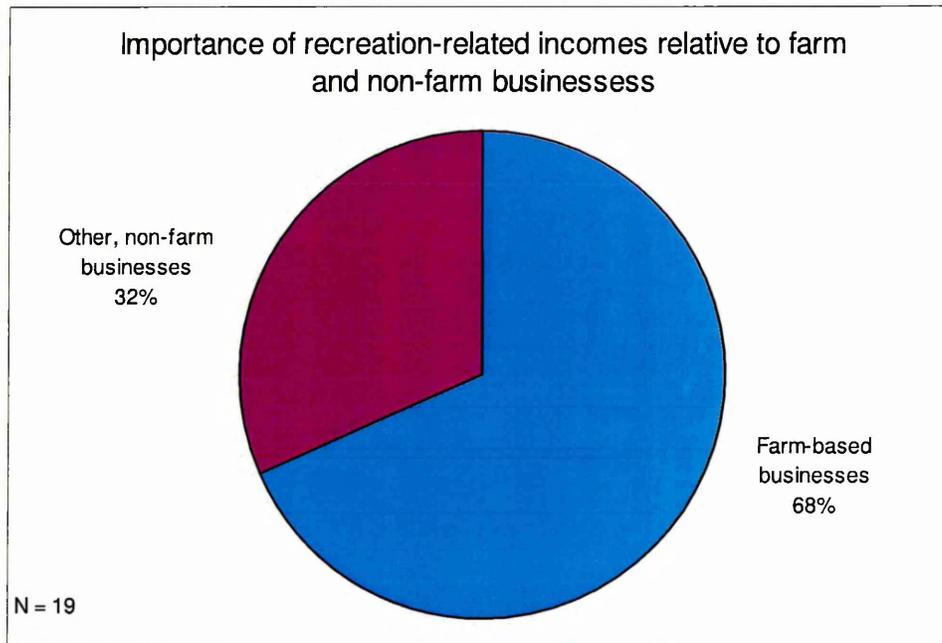
That recreation-related income is noted as an important source of secondary income for businesses within all three case study regions, Table 82, irrespective of their visitor market development, illustrates that recreation and leisure can provide an important contribution to small businesses across a range of visitor market scenarios, from the undeveloped Humberhead Levels, to the more developed and visitor-attuned Somerset Levels and Moors.

5.1.3.2. Farming and secondary, recreation-related incomes.

As Table 83, below, shows, there is a variety of primary and other income sources detailed within the questionnaires, although not all rate recreation-related income sources as important. Of note, however, is the number of farm-related businesses with recreation business activities as a secondary source of income noted as important. The proportions are shown in Graph 51. As can be seen, farm-related recreation businesses equate to 68.4% of those business considering recreation-related income important. The importance of this secondary, recreation-related income to farms and agricultural activities has potential implications for land management in the absence of visitors and associated income.

| Region | Non-recreation related income source | | Recreation-related income source |
|-------------------------|--|---|----------------------------------|
| | Recreation-related income considered important | Recreation-related income not considered important. | |
| Humberhead Levels | arable farming | | holiday cottage |
| | fabrication workshop, & wife works in a school | | campsite |
| | farm letting | | fishing ponds |
| | arable & sheep on rented farm | | farm visits, maize maze |
| | | educational theatre group | organic café & shop |
| Fens | wholesale caravan/camping equipment | | B&B (+ pottery) |
| | pension (+ farm) | | Guesthouse |
| | American stretch limo business | | Guesthouse |
| | conservation business | | B&B |
| | farming | | self-catering |
| | arable farming | | self-catering |
| Somerset Levels & Moors | farm | | B&B + self-catering |
| | farm, silage contractors, poultry | | B&B + self-catering |
| | farm (+ sell thatching straw) | | self-catering |
| | dairy farm, + wife a full time company administrator | | B&B, (+ equestrian trails) |
| | | pension | B&B |
| | dairy farm | | B&B + self-catering |
| | pension | | B&B |
| | beef & arable farm | | DIY stables/exercise |
| | | pension | B&B |
| | farm | | B&B + self-catering |
| | important but no details of other income source | | wildlife park |
| | engineering & office | Caravan club site | |

Table 83: Primary & other income sources of businesses detailing secondary income sources as important or not important, including secondary recreation business.



Graph 51: The importance of recreation-related incomes to farm and non-farm related businesses.

With respect to Table 83, of the businesses which consider income from visitors to be important to their household income, the majority of businesses, ten in total, undertake visitor accommodation in conjunction with farming or farm-related activities. It seems that accommodation is often used as a method of increasing overall farm income and maintaining farm viability. This is noted by the respondents' comments detailed in Table 82 and Table 84.

Further to the qualitative and descriptive questionnaire responses detailed in Table 82, Table 84 details comments made by farm-based recreation businesses at the time of questionnaire distribution, with respect to the importance of the secondary and visitor-related income (including comments from those no longer involved in farming or agriculture). Although these comments are not verbatim, having been compiled from notes made during questionnaire distribution, they nonetheless illustrate the greater value of visitor-related income and the importance of that income to business viability, and thus potential contributions to the wider, local economy. As such, the comments detailed in Table 82 and Table 84 illustrate the importance of visitor spend in helping to maintain rural communities and economies.

| Region | Comments made |
|------------------------------------|---|
| Humberhead Levels | Boston Park Farm; the maize maze creates more income from visitors than the farm. |
| | Rushlome Grange Farm; self-catering, birdwatching, walking trails; the income helps in general. |
| | Glade Farm B&B & livery; B&B and livery 'forced' on them by the drop in farm incomes. |
| | Hasholme Carr Farm, (now retired/semi-retired); - have to get some added income from the farm to keep farming (initially straw for thatching using heavy horses which became an attraction). |
| | Wholesea Grange; farmland rented out, but owner runs fishing lake - 'every little helps'. |
| Fens | Goose Hall Farm B&B/self-catering; can make £200/night from B&B visitors. Used to grow 10 acres of asparagus, and make a living from the small holding, but no longer possible. One of the maintenance workers helping at the B&B is a local farmer who says small farms are being sold to large farms. |
| | Tyler's Farm Shop; No farmland anymore - sold off. Shop started because pig farming wouldn't pay, then cattle wouldn't pay. Shop and caravan park now the income earners. The shop used to subsidise the farm. Now no farm, so can concentrate on the shop. Used to be 3 dairy herds in Wicken, now none. Easier with the shop than with the farm and shop. |
| | Caves Farm Barns, Littleport. B&B, self-catering, Caravan & Camping, plus farm. 300 acres, but needs the B&B etc. to survive. Without these, another income source would be required. Wife works full-time elsewhere. Tourism/visitors important (<i>to the area</i>). |
| Somerset Levels & Moors | Temple Farm/Apple View B&B/self-catering. Have 70 dairy cattle. Not enough to make a living. Could make more doing contract milking. So cattle to be sold this year. Recently expanded their on-farm accommodation. |
| | School Farm, Muchleney, pick-your-own fruit, shop, food. On weekends, 50% of customers are visitors - be in trouble without them. |
| | Double Gate Fm, Godney. 100 acres, & 50,000 chickens, and still can't make a living from farming. B&B props up the business - couldn't do without it. Farmers wife has heard of two, long established farms giving up farming for tourism/visitors. Thinking of doing the same themselves. |

Table 84: Edited comments on the importance of visitor income to current and former farm-related businesses.

5.1.4. The contributions and impacts of recreation businesses within the wider community.

As channels of income and expenditure, businesses in general enable the distribution of money throughout a community. This particularly so if the business employs local people and uses local services and supplies. To assess this, the recreational business questionnaire asked questions related to employment and the use of local services and products, the results of which are detailed below.

5.1.4.1. Employment levels at surveyed recreation businesses.

The distribution of income throughout a community can be greatly assisted by the employment of local people. The employment of local people will retain income within the locality, whilst employment of non-local people will transfer income to other areas, and thus the employment of non-locals contributes to economic leakage (Cooper *et al.*, 1998; Crompton *et al.*, 2001). Although this latter condition will benefit the wider economy, it will lessen any benefits to the local economy. To ascertain the potential for overall and local employment, questionnaires asked for details of local, non-local, part and full time employees. It should be noted, however, that it is unclear if the number of employees indicated includes or excludes the recreation business owner in all responses, the questionnaire having asked for the number of staff. Several respondents have indicated that they do not employ staff, suggesting that, as owners of recreation businesses, they do not consider themselves to be employed by the business. The results do, however, give an indication of the potential employment or job equivalents, resulting from the identified recreational businesses, and thus their potential contribution to local economies. Table 85 details the number of businesses that employ staff.

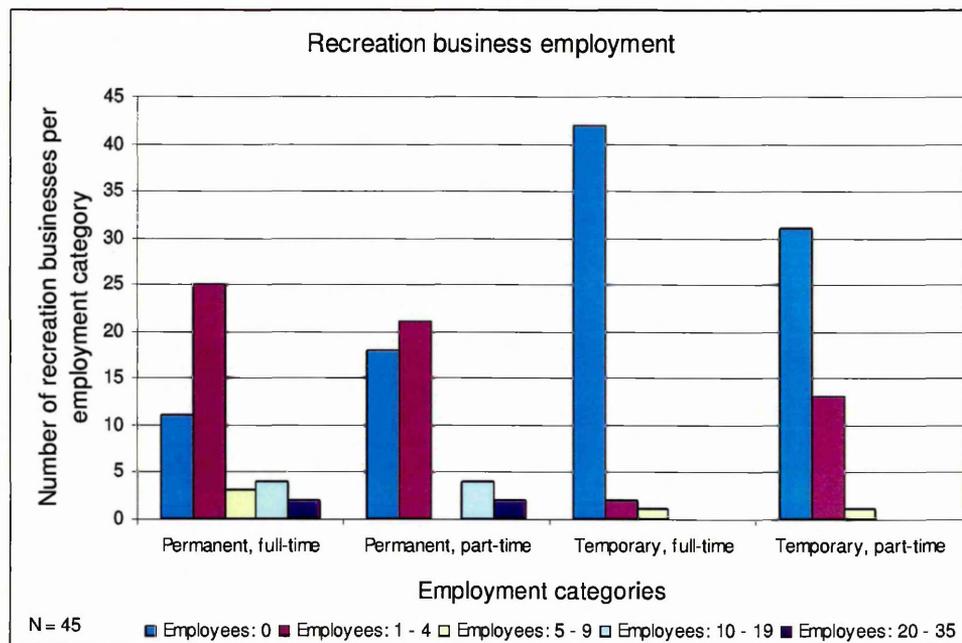
| | Number of businesses employing staff | Number of businesses employing no staff |
|-----------------------------------|---|--|
| Permanent, full-time staff | 34 | 11 |
| Permanent, part-time staff | 27 | 18 |
| Temporary, full-time staff | 3 | 42 |
| Temporary, part-time staff | 14 | 31 |

N= 45.

Table 85: Number of businesses employing staff

As Table 85 and Graph 52 illustrate, comparatively few businesses employ temporary staff. The questionnaire responses indicate that the employment period of temporary staff varies throughout the year, although the lack of responses does not indicate a preference for any particular time of the year for temporary staff employment.

The number of permanent, full and part-time employees in each recreation business varies considerably, ranging from zero to twenty-nine. The number and categories of employees are shown in Graph 52, compared to the number of recreation businesses per employment category. From Graph 52, it can be seen that whilst many of the recreation businesses do not employ staff of any category, of those that do, the majority employ between one and four, predominantly full-time staff. Thus whilst an individual recreation business may have limited impact on the local employment market, collectively, several recreation businesses within an area will have an increased impact on the employment market and economy. In this respect, the significance of employment and economic contributions to local economies could be enhanced by the establishment of a cluster of recreation and associated businesses, with that cluster potentially acting as a draw for similar businesses, thus increasing economic potential further, as discussed within section 6.0.8.1.

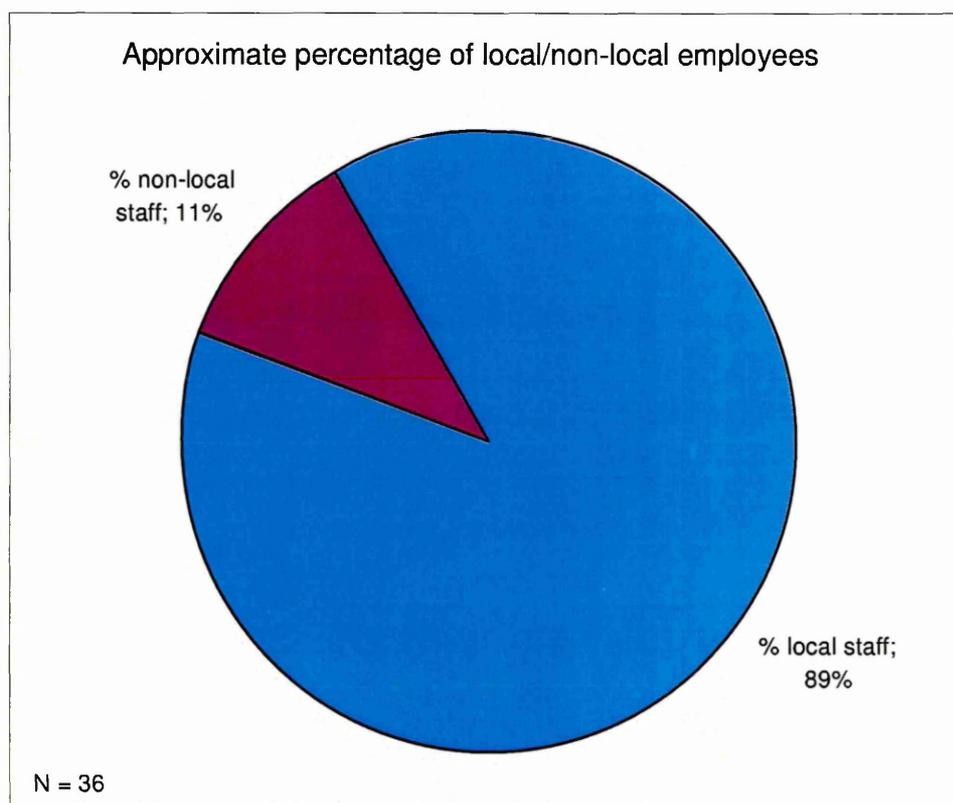


Employee groupings derived from SBS, 2003.

Graph 52: Graph detailing employment and recreation businesses per employment category.

5.1.4.1i. The employment of local staff.

With respect to the employment of local people, Graph 53 illustrates the proportions of local and non-local employees, with a clear indication that employees are drawn from local communities and thus with consequential benefits for local income retention and local services, and thus potentially local community viability. For the purposes of enquiring after local employment and employees, 'local' was defined in the questionnaire as within a 5-mile radius of the recreation business. Whilst the questionnaire asked for both actual numbers and percentages of local and non-local employees, the majority of responses were in percent format. Insufficient responses in actual employee numbers were provided to be of use.



Graph 53: Percentage of local and non-local employees.

With the employment of local people being indicated at a proportionately high level, Graph 53, the potential for increased contributions to local economies is evident, as is the potential for income retention within the local economy. As such, the viability of the local community is likely enhanced, on the assumption that those employed locally will make use of local community services. In this respect, recreation business that employ local staff can contribute significantly to the maintenance of rural communities.

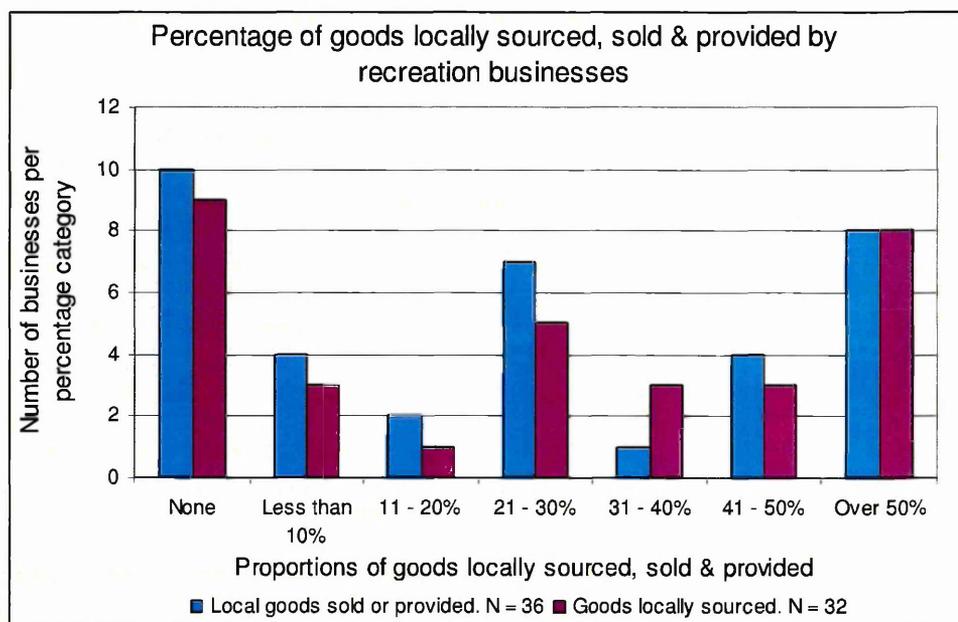
5.1.4.1ii. Employment levels as an indicator of business classification.

In conjunction with the low values of recreation business turnover identified, the low levels of employment indicated within the findings place the recreation businesses surveyed within the category of 'small enterprise', i.e. with employee numbers being below fifty, in accordance with the definitions detailed by the European Commission (2005). Further to this, with many of the businesses surveyed employing ten people or less, Graph 52, such businesses are likely to be further classified as 'micro enterprises' with respect to European Commission definitions. However, as a critical factor of enterprise description (European Commission, 2005), the ambiguities of the responses obtained with respect to employment numbers including business owners or not, noted above, preclude any meaningful proportional breakdown between small and micro enterprises in this respect. That the data is unclear with respect to inclusion of business owners or not within 'employee numbers' prevents an accurate tally or 'head count' with respect to the total number of individuals involved within a business, with further complications in respect of seasonal and temporary staff. Each individual, including business owners, are defined as 'work units' within the definition of micro and small enterprises. Temporary staff are given *pro rata* values related to their duration of work within a given year (European Commission, 2005). As such, the data obtained for this current research are insufficient to undertake such calculations, and therefore is unable to offer definitive descriptions of enterprise type, small or micro.

5.1.4.2. The provision and sale of local produce by surveyed recreation businesses.

Further to distributing income through local communities is the use and sale of local produce, both in the form of food provided at, for instance, B&Bs, and also through the sale of goods for visitors to take home. The importance of the sale of local produce as an income generator in rural areas is evidenced by the growing number of farmers markets and publicly assisted schemes such as 'Eat the View' (Countryside Agency, 2001c), 'Tastes of Lincolnshire' (Fens Tourism, 2004), and the establishment of numerous 'food-links' to stimulate the sale of locally produced food, and thus generate additional sources of local income (SWLFP, 2003). Therefore the questionnaires asked of recreation businesses the proportion of locally produced goods sourced and sold. Of forty-three businesses responding, 67.4% claimed to sell locally produced or manufactured goods. 'Local' in this instance being within a 30-mile radius of the

business, as defined by the National Association of Farmers Markets (NAFM, 2002) and as used by SWLFP (2003) in evaluating the economic importance of local food sales . Illustrated as percentages, due to a lack of information on actual financial values, Graph 54 details the proportions of local goods sourced, sold and provided by recreation businesses.



Graph 54: Percentage of goods locally sourced, sold and provided by recreation businesses.

Although around a third of recreation businesses do not sell, provide or source local goods and products, and the range of those that do is varied, nonetheless, Graph 54 illustrates the potential contribution available to local economies should recreation businesses source their supplies and visitor-related goods locally.

5.1.4.3. The benefits of visitors to local services.

Outside of factors of income, employment and local produce, several recreation businesses commented on the benefits of visitors to local services and communities. Table 86 details comments made. As such, Table 86 expresses important links between visitors, their spend, and the maintenance of local community services. With those services maintained and used by locals and non-locals alike, a value in excess of the monetary value attributable to visitor spend is thus demonstrated.

| Region | Benefits to local services |
|------------------------------------|--|
| Humberhead Levels | 'pubs love it' - visitors coming. Local services have come and told Mr. X how much it helps them - local shops, Post Office, 2 pubs & chip shop. Currently, visitors important for local services. (Attraction) works with B&B in Epworth, in sending guests looking for accommodation. Transport Museum sends customers wanting food to the airfield for food Farm fridge magnets are made in Thorne by disabled people, |
| Fens | Tourism/visitors important (<i>to the area</i>). Visitors very important, for local pubs, shops etc. (<i>attraction has an</i>) important social function; 16 part-time employees, most from the local area. Visitors good for local shops. Owner sends visitors to the local pub. Visitors use the local pubs etc. |
| Somerset Levels & Moors | (B&B) sends people to the local pub. Sends guests to local attractions. Lots of visitors come from the caravan park, and also go to the local pub. |

Edited responses.

Table 86: The benefits of visitors to local services.

5.1.5. The importance of secondary 'attractions' in attracting visitors.

With Table 77 detailing the primary recreation business attractions, recreation businesses were asked to detail what they considered to be their secondary attraction(s), if any. However, in response to this question, many respondents gave answers which were less of an actual attraction at their business, but related more to the surrounding area and quality of life issues, such as sunsets and tranquillity, unique landscape, peace, vicinity of towns and other attractions. As such, answers so provided reflect responses given by visitors with respect to their perceptions and opinions of the case study regions (section 4.1.13.), and thus seem to be considered as attractors by both recreation businesses and visitors alike. In addition to these factors, recreation businesses also noted activities such as walking, fishing and boating as secondary attractions. Thus, from these responses a picture was developed with respect to what recreation business owners considered important to their business within the neighbouring area. A similar, although lesser, response was also apparent in the primary attraction responses. Both primary and secondary attractions were categorised together, coded, grouped and tabulated, Table 87. From this, an indication of the importance of particular types of attractions and activities could be determined, as viewed by recreation business owners, and illustrated in Graph 81 (business appendix).

| Grouping | Count |
|--|--|
| Accommodation; (inc. 'accommodation', B&B, caravan/camping, hotel, self- catering). | 27 (accommodation' - 3: B&B - 11: caravan/camping - 6: hotel - 2: self-catering - 5). |
| 'Other' | 19 |
| Visitor destinations/centre, including. 'tours' | 17 |
| Shop (inc. supplies) | 13 |
| Wildlife, inc. birdwatching | 12 (birdwatching - 3) |
| Boat related; (inc. 'canal') | 11 |
| Historic | 10 |
| Walking | 8 |
| Café (restaurant etc.) | 7 |
| Fishing | 7 |
| Quality (of life) | 7 |
| Farm (NOT inc. accommodation) | 6 |
| Gardens & garden centres | 6 |
| Golf | 6 |
| Museum (s) | 6 |
| Equestrian | 5 |
| Landscape | 4 |
| Pubs (inc. licensed premises) | 4 |
| Environment/conservation | 3 |
| Cycling | 2 |
| Social considerations | 2 |
| 'None' | 1 |

NOTE; some attractions detailed are almost exclusive to one particular business questionnaire, e.g. the boating category. This table is an indication of the number of times 'attractions' get mentioned, and thus demonstrates a level of recognition of the 'attractions'.

'Other' category; one-off or difficult to categorise 'attractions'.

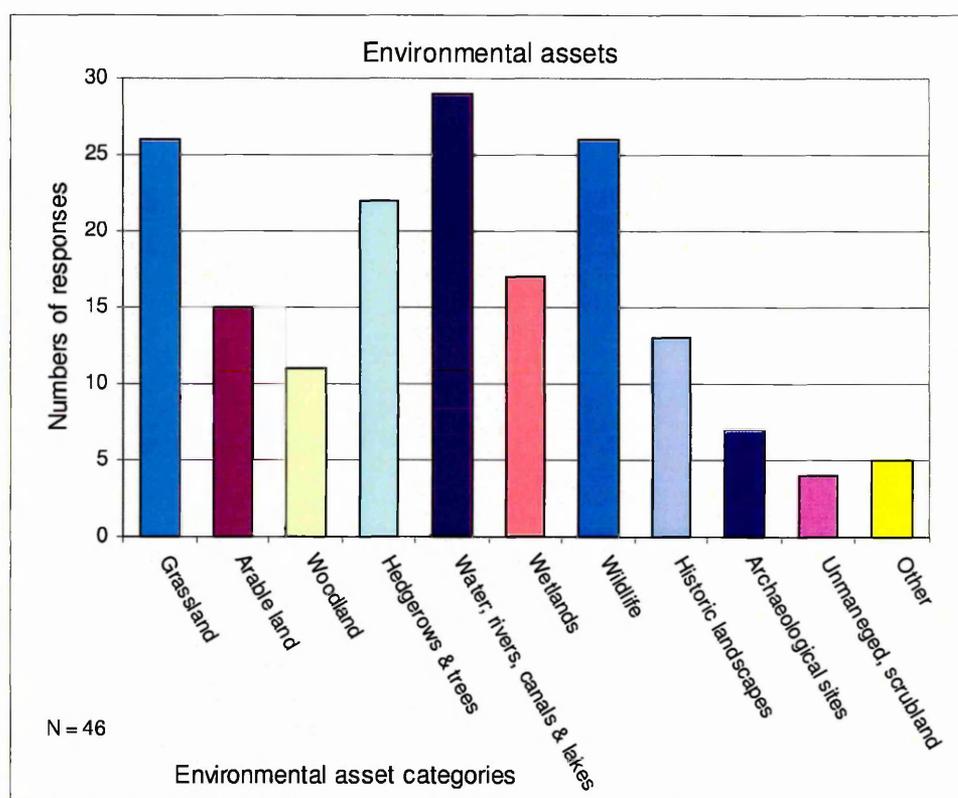
'Licensed premises'; categorised under 'pub', i.e. alcohol sales, but may be a bar attached to a hotel/accommodation.

Table 87: Attraction categories.

From Table 87 it can be seen that accommodation receives by far the highest 'count', in part reflecting the high survey response rate from accommodation suppliers. Aside from the ubiquitous 'Other' category, wildlife, local visitor destinations, shops, historic and boating categories also receive regular counts, with outdoor activities such as fishing, walking, farm visits, gardens, equestrian activities and cafés also receiving a similar number of counts. However, on a note of caution, 'boat related' receives a high count due to the variety of boat-related services offered by a few businesses and identified on a limited number of questionnaires. Whilst this does potentially skew the data obtained, in this instance in favour of boating activities, Table 87 and Graph 81 represent the range of recreation categories and services, and their relative importance, as noted by recreation businesses, and is not an actual count of secondary attractions offered by recreation businesses. That wildlife is presented as an important factor within Table 87 indicates the value placed on wildlife by recreation businesses as a visitor attractant, thus providing a financial value to wildlife with respect to income generation from visitor spend.

5.1.5.1. Environmental assets as factors of importance in attracting visitors.

With respect to issues of quality of life, nature-based leisure and recreation and landscape factors, recreation businesses were asked to provide details of environmental 'assets' which are a factor within the business operation. From this data, the perceptions of recreation businesses compared to visitors expectations, likes and dislikes of the rural landscape can be compared. Such environmental assets include the farmed landscape, water features, woodlands and wildlife. Graph 55 illustrates the number of recreational businesses indicating which environmental assets are offered by the business as a factor in its existence and operation, as indicated through the selection of predetermined environmental asset categories by recreation businesses.



Graph 55: Environmental assets offered as a factor in recreational business existence and operation.

Determined from quantitative data within the recreation business survey, it can be seen from Graph 55 that water, rivers, canals and lakes are the predominant environmental assets offered by and considered important to recreational businesses. Due to the popularity of water-based activities and the number of rivers and canals within the study regions, this is perhaps not surprising. Also considered important are wildlife and grasslands, followed by hedgerows and trees. Wetlands, a consideration for this

research, also are also noted as having some importance. Unsurprisingly, given the type and relatively treeless landscape within the study regions, woodlands are considered less important. Historic landscapes, perhaps due to the relatively recent drainage of the study regions, receive mention, although archaeological sites are only offered by a few businesses. Whilst water, rivers, canals and lakes, along with grasslands and wildlife are the predominant environmental assets on offer, Graph 55 illustrates that there is a broad spread of environmental assets considered important and offered by recreational businesses within the study region.

5.1.5.2. Factors and 'selling points' used by recreation businesses as visitor attractants.

Recreational businesses were asked to identify the principal factors with which they advertise their business and the wider region to the visitor market, if at all. Table 88 details the main categories of factors as established through content analysis of descriptive responses given, with Table 120 detailing those categories by region. As can be seen, 'countryside', 'rural' and 'landscape', with 'peace', 'tranquillity' and 'quiet', are regularly presented as descriptors at attractions. Regionally, however, 'wildlife' and 'nature' are presented as the main descriptors.

| Descriptor category | Visitor attraction | Region |
|---|--------------------|--------|
| | Count | Count |
| <i>Activity (walking, cycling, equine etc. excluding boating/fishing)</i> | 3 | 6 |
| <i>Countryside/rural/landscape</i> | 18 | 6 |
| <i>Culture/historic/archaeological</i> | 8 | 9 |
| <i>Facilities/amenities/neighbouring areas/cities/towns</i> | 7 | 7 |
| <i>Farm-related</i> | 6 | 0 |
| <i>Local produce</i> | 4 | 2 |
| <i>Peace/tranquillity/quiet</i> | 14 | 1 |
| <i>Water/boats/fishing</i> | 7 | 6 |
| <i>Wildlife/nature</i> | 6 | 11 |

Each category count recorded once only per questionnaire response to indicate principle factors.
 Visitor attraction responses: N = 48.
 Regional responses: N = 35.

Table 88: Categories of factors used by recreational businesses in advertising visitor attractions and the case-study regions.

5.1.6. Regional image and perceptions as viewed by recreation businesses.

With landscape image and perceptions considered an important aspect in attracting visitors, and therefore important for the research, recreational businesses were asked for their opinions, and the opinions of their visitors, on the image, perceptions and marketing of the case study regions of the Humberhead Levels, the Fens, and the Somerset Levels and Moors. From the descriptive responses given, themes were identified and tabulated, enabling an overview relative to the image and perception of each region to be determined and compared to visitor responses on image and perceptions, (section 4.1.13.). Table 89 and Table 119 detail the identified themes for all regions.

| General themes in descriptive responses. | |
|--|--|
| Positive themes | Negative themes |
| Beautiful landscape, big skies & sunsets. Cultural, historic & wildlife attractions. Increased, co-ordinated & appropriate marketing & raised regional profile would help. Lack of commercialisation. More interesting than thought. Lots to do, (if you look). Quiet, tranquil & peaceful regions. Rural areas, unspoilt. Visitors help local economies. | A factory, not countryside (Fens). Flat, dull, boring landscape and regions. Insufficient public awareness & poor regional image. Lack of facilities & attractions. Lack of regional identity, knowledge & information (especially HHL). Negative public perception. Over development potential. Red tape & bureaucracy. Regions to pass through, not visit. Sufficient visitors (Somerset). Uninteresting regions, little of cultural or scenic interest. |

Unlimited number of themes identified per questionnaire response to highlight reoccurring themes/content.
 Image & perception responses: N = 47.
 Marketing responses: N = 40.

Table 89: Identified, general themes relating to regional image, perception & marketing.

5.1.7. The importance of neighbouring attractions as factors of business operation.

With the potential for a cluster of attractions to be a greater visitor draw through offering increased attraction variety, recreational businesses provided details of neighbouring businesses considered to be important to their business operation, i.e. in attracting visitors. From data obtained, the importance of wildlife and wetland-related attractions to recreational businesses could be noted, as detailed in Table 90 and Table 91.

| Region | Number of times wildlife/flora* related attractions identified as 'important' per region |
|-------------------------|--|
| Humberhead Levels | 0 (N = 6) |
| Fens | 14 (N = 13) |
| Somerset Levels & Moors | 9 (N = 18) |
| <i>Total</i> | <i>23 (N = 37)</i> |

*Including wetlands and flower farms/festivals.

Table 90: Count of identified importance of wildlife & flora attractions per region.

| Region | Attraction name or type identified as important by near-by recreational businesses | Number of times indicated |
|----------------------|--|---------------------------|
| Humberhead Levels | - | - (N = 6) |
| Fens | RSPB Ouse Washes Reserve | 1 |
| | Un-named RSPB reserves | 1 |
| | Wildfowl & Wetland Centre, Welney | 5 |
| | Local nature reserves | 1 |
| | Butterfly farm | 1 |
| | Flower farms & festivals | 5 |
| | <i>Total</i> | <i>14 (N = 13)</i> |
| Somerset | Un-named nature reserves | 1 |
| | RSPB Westhay Reserve | 1 |
| | Un-named RSPB wetland reserve | 1 |
| | Willows & Wetlands Centre, Stoke St. Gregory | 3 |
| | Un-named wetlands/wetland centre | 2 |
| | Secret World & Animal Adventure Park | 1 |
| <i>Total</i> | <i>9 (N = 18)</i> | |
| <i>Overall total</i> | <i>23 (N = 37)</i> | |

Table 91: Wildlife & flora related attractions identified and considered important by neighbouring recreation businesses.

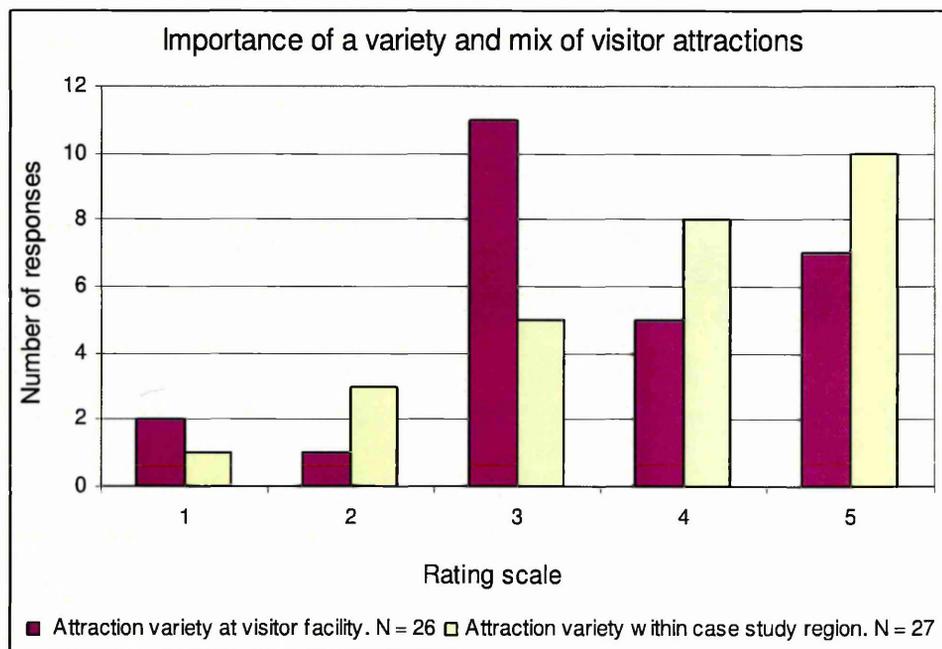
5.1.8. Recreation business collaboration and the importance of a variety of visitor attractions.

Data was obtained on whether or not recreational businesses collaborated with each other, formally and informally, and whether it was considered important that there was a variety of visitor attractions at a visitor facility and within the study regions. As indicated previously, a variety of visitor attractions and collaboration by recreational businesses could present a more coherent destination image to visitors, and thus be more attractive to visitors, in as much as the sum is greater than the parts.

Thirty-two (69.6%) of forty-six recreational businesses claimed to collaborate in some way with neighbouring recreation business or tourism organisations. Graph 82 indicates

that collaboration generally consists of displaying information leaflets detailing other attractions, informal sharing of customers, and membership of a local tourist organisation.

With respect to the importance of a mix of attractions, the majority of responses indicates that a mix of attractions is important within the case study regions, contrary to that identified through visitor surveys (section 4.1.10.), whilst a mix of attractions is considered less important at an individual visitor facility, Graph 56, as indicated by the mid-point '3' rating within the Likert rating scale used.



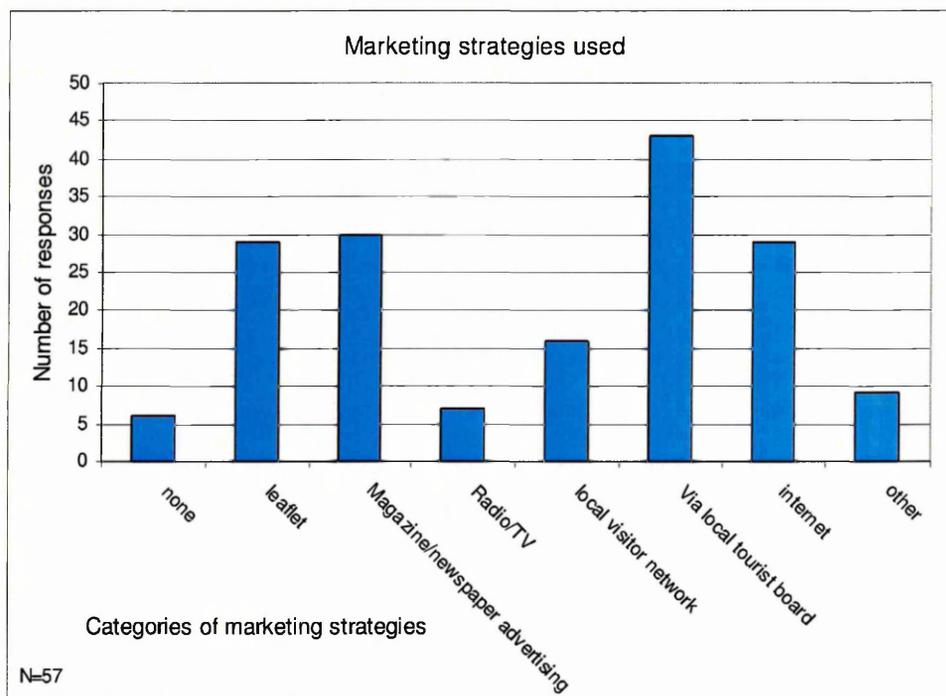
Graph 56: Importance of a variety of attractions at a visitor facility and within the case study regions.

5.1.8.1. Income generation via added value facilities.

Further to a variety of visitor attractions, and with consideration regarding income generation, of fifty-five responses obtained, fifteen recreation businesses indicated the presence of a café on the premises, with a further nineteen also indicating a shop on the premises. Whilst cafés and shops may be the primary reason for some recreation businesses, for others such facilities increase the income generation potential of the recreation business. As such, they may be vital for the viability of the business, as noted by Rotherham *et al.*, (2005a).

5.1.9. Marketing strategies used and visitor markets targeted.

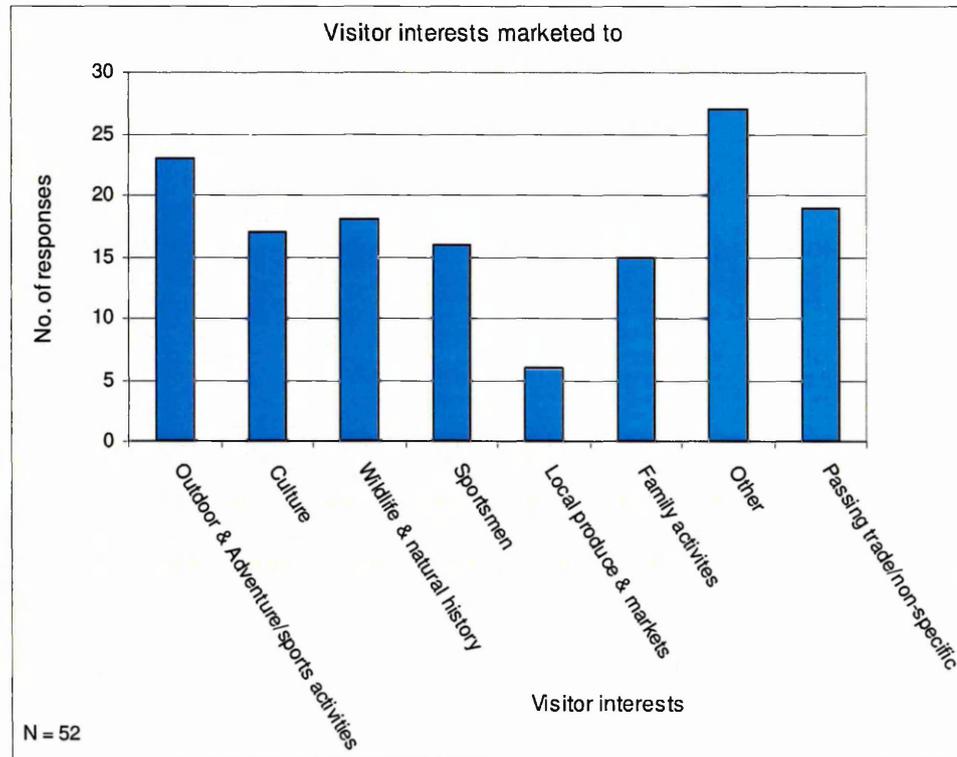
With respect to visitor profiles and marketing to visitors, and thus increasing visitor numbers, recreation businesses were asked what, if any, marketing strategies were used. The majority of businesses undertook some form of marketing, with many being involved with their local tourist board. Graph 57 details marketing strategies used and the number of recreation businesses using each marketing category. As would be expected within the categories given, aside from local tourist board marketing, leaflets and magazines predominate the type of marketing used, with an increased use of the internet. Thirty recreation businesses market their business via the internet. The internet provides an opportunity to access customers hitherto unavailable, and thus presents an opportunity to market niche visitor attractions such as nature-based leisure and recreation to a wider audience, with potential for increased visitor numbers and visitor spend.



Graph 57: Marketing strategies used by recreation businesses.

Recreation businesses were also asked to indicate which visitor interests (s) they targeted, with the intention of identifying those visitor interests considered important by recreation businesses. Graph 58 details visitor interests targeted by recreation businesses within the study region, and illustrates that, excluding 'other' and excepting local produce and markets, there is little difference between visitor interests marketed to.

Whilst outdoor and adventure/sports activities are targeted above other categories, this is not considerably so. The similarity of the number of responses in each category suggests that recreation businesses do not target one visitor interest above another. All visitors are welcome.



Graph 58: Visitor interests targeted by recreation businesses.

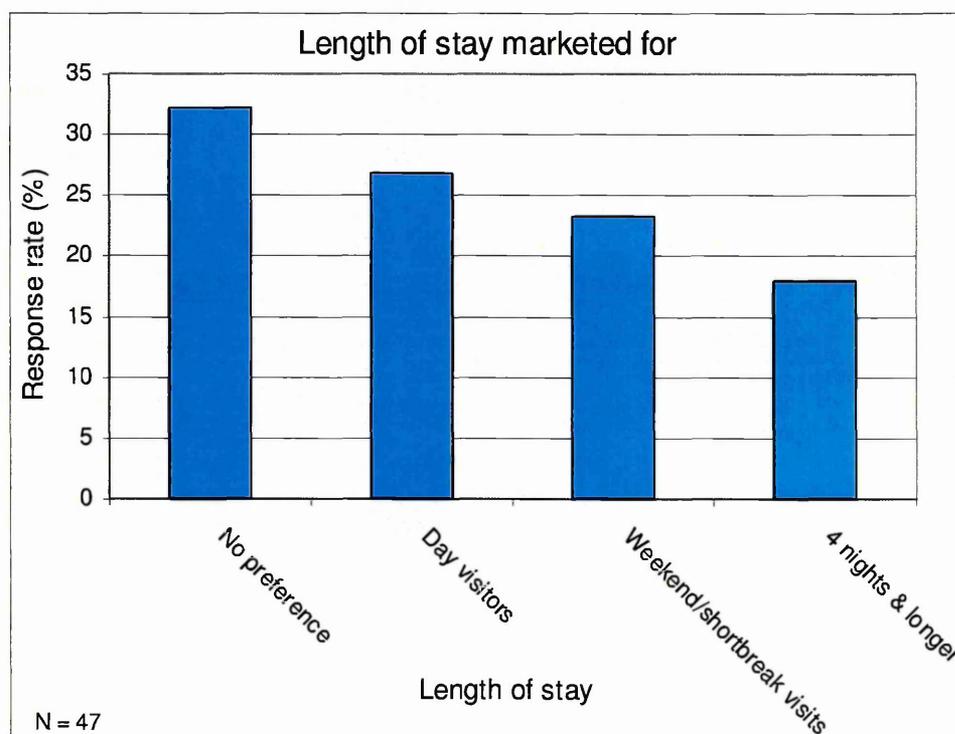
5.1.9.1. Market research.

With respect to conducting market research, 49% (twenty-three of forty-seven businesses) undertake some form of market research, however limited. Such research may include capitalising on information gained from local tourist organisations, or simply asking visitors for their views. Table 116 (Appendix Two) details descriptive responses to survey questions on conducting market research.

5.1.10. Length of visitor stay marketed for & estimated length of visitor stay.

On the presumption that over-night stays generate a higher proportion of visitor income than day or short-stay visitors, and are thus more beneficial to peripheral visitor

destinations (Andrew, 1997; Flognfeldt, 1999), recreation businesses were asked to indicate which sector of the visitor market the recreation business was targeted at, if any: day-visitors, weekend-short break (i.e. 1 - 3-night stays), or four nights and longer. As can be seen from Graph 59, the majority of businesses indicate a preference for overnight stays. However, this should be observed in relation to the high proportion of accommodation suppliers responding to the survey. The 'no preference' category received the greatest number of responses of any category¹⁰.

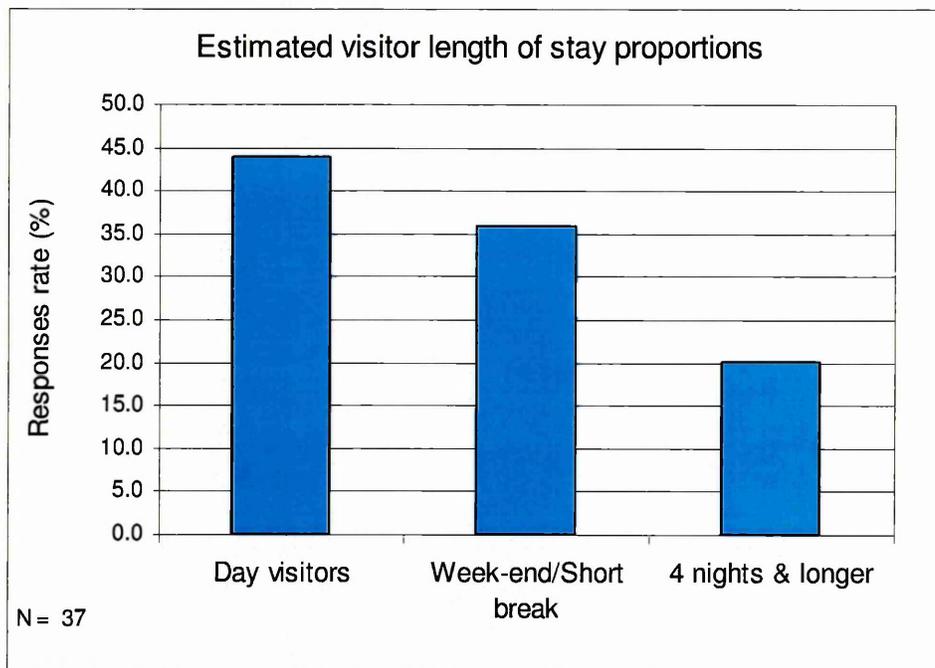


Graph 59: Length of stay marketed for.

5.1.10.1. Estimated length of visitor stay.

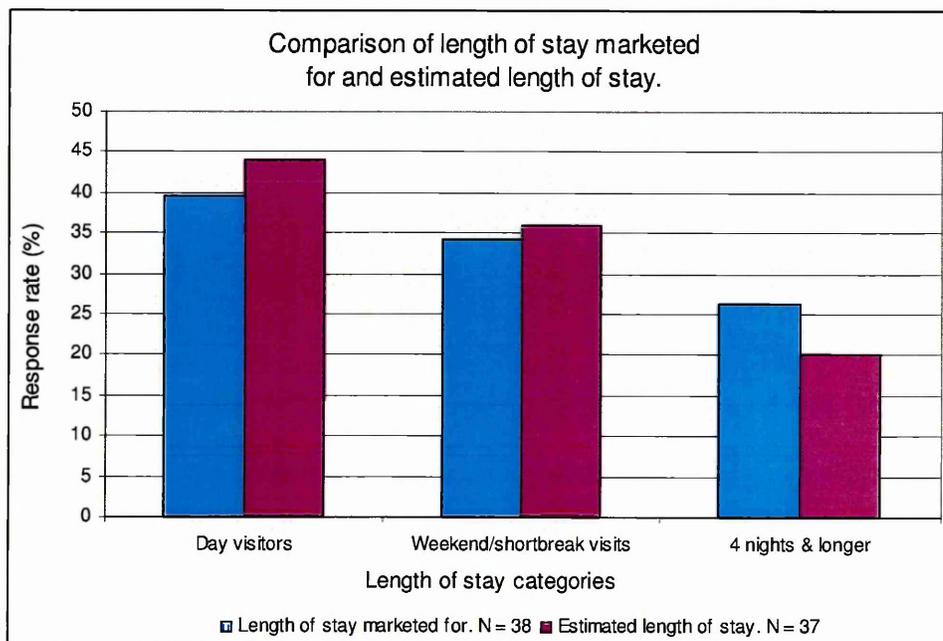
Recreation businesses were also asked to estimate the length of stay of visitors to enable an indication of the importance of each category to be determined. Furthermore, such data can be compared to length of stay data obtained from visitor surveys. Graph 60 details the length of stay as estimated by recreation businesses. As can be seen, the greatest proportion of visitors are day-visitors.

¹⁰ It should be noted that some businesses market for a variety of overnight staying visitors, i.e. weekend/short-break and 4 nights and longer. Thus Graph 59 illustrates numbers of responses received (56), rather than number of respondents (47).



Graph 60: Estimated visitor length of stay proportions.

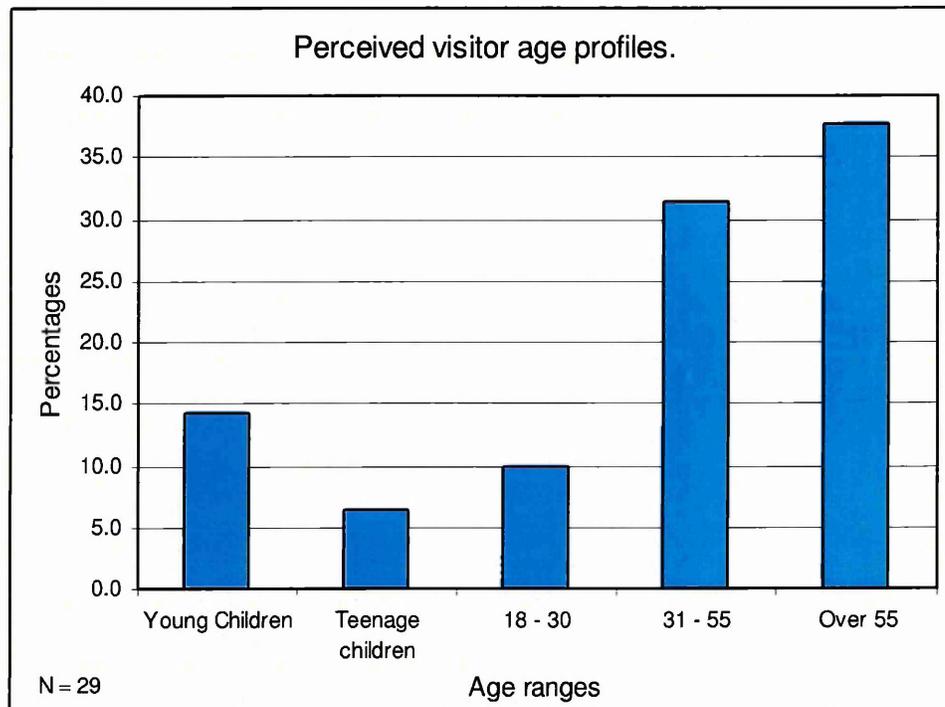
As a comparison of length of stay marketed for and the estimated length stay, Graph 61 details length of stay 'marketed for' data, excluding the 'no preference' category detailed within Graph 59, in conjunction the estimated length of stay data. With the response rate adjusted for the lack of the 'no preference' category, it can be seen that, generally speaking, the length of stay marketed for and estimated are similar.



Graph 61: Comparison of length of stay marketed for, and estimated length of visitor stay.

5.1.11. The visitor age profile as perceived by recreation businesses.

Recreation businesses were asked to indicate the perceived age profile of their visitors to enable comparisons with actual age profiles obtained from visitor surveys. Whilst it was expected that these would be similar, how businesses perceive the age of their visitors could affect the marketing of the business. Should this be askance of actual visitor age profiles, then identifying this will enable marketing to be targeted appropriately, with potentially increased visitor numbers and spend. Furthermore, and importantly with respect to the research methodology, should the perceived and actual age profile of visitors be similar, as is noted from the actual visitor age profile, Graph 30, then an element of validity is engendered in the research process. Graph 62 details the perceived visitor age profile.



Graph 62: Visitor age profiles as noted by recreation businesses.

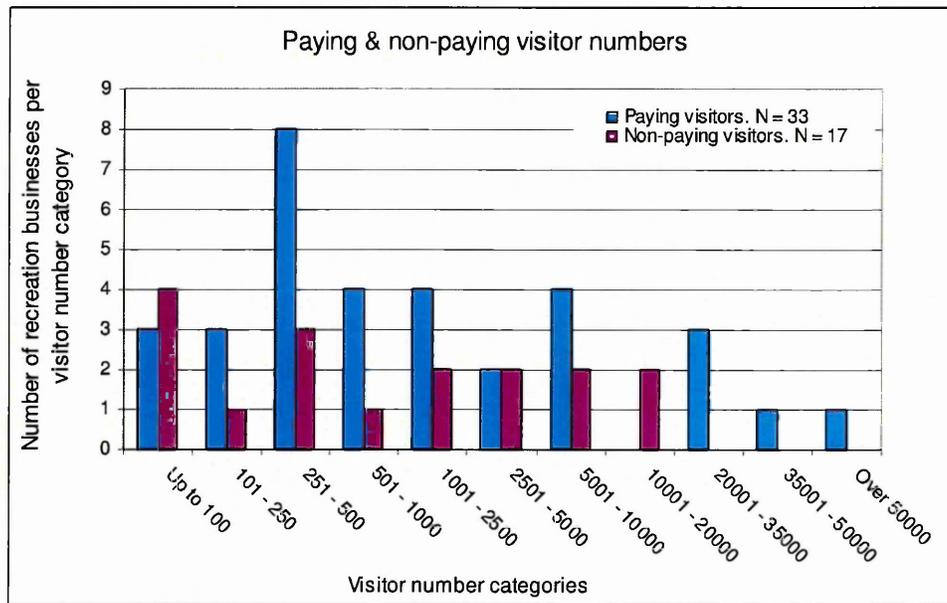
As can be seen, of all the categories, the Over 55 category is perceived to attract the greatest proportion of visitors, whilst the majority of visitors are aged thirty-one and over. Such an age top-heavy visitor profile will have implications for the type of visitor attraction within the study regions, and potentially on visitor spend.

Whilst recreation businesses perceive their customers to be older, the data collected shows that the majority of businesses (thirty-five of fifty-one respondents) have no

preference for and do not market to any particular age profile of visitors. Of the remaining sixteen respondents, limited data prevents further analysis, although data indicates a mix of visitor profiles are marketed to, but no individual age range is predominant.

5.1.12. Visitor numbers and admission charges.

Data obtained relevant to visitor numbers includes both paying and non-paying visitors. Whilst paying visitors clearly contribute to business turnover and theoretically to local economies, non-paying visitors also have potential to contribute to local economies through the purchase of goods during their visit, and thus are important. However, many visitor attractions that do not have an admission charge are unmanaged, free entry sites. Thus, unlike managed attractions that charge admission fees, it is difficult to obtain visitor numbers to free admission attractions as visitors are often uncounted. Consequently, visitor figures for unmanaged attractions could be over- or under-estimated. Graph 63 details categories of paying and non-paying visitor numbers. The limited number of data samples for non-paying visitors should be noted.



Graph 63: Categories of paying and non-paying visitors.

As can be seen from Graph 63, visitor numbers are relatively low. As an approximate comparison to visitor numbers per attraction within the UK, data from Star UK (2002) suggests that, on the basis of there being approximately 6,800 visitor attractions within

the UK, generating 413 million visits in the year 2000, visitor attractions on average receive around 60,700 visitors per year. Whilst such a figure includes data from popular visitor attractions such as the Eden Project (1.83 million visitors), Tate Modern (4.6 million visitors), and the London Eye (4 million visitors) (Star UK, 2003a), and is thus correspondingly high, such a comparison illustrates the low level of visitor numbers to attractions surveyed during this research. However, as Graph 50 and Graph 51, and Table 81, Table 82 and Table 83 show, income from visitors, no matter how low, is considered important.

With respect to admission charges, of those recreation businesses providing information, a total of thirty-nine businesses, 59% (twenty-three businesses) do not make an admission charge. However, within this sample are businesses such as B&Bs, hotels and caravan parks, who do charge for accommodation, but do not consider such charges an admission charge. Although actual admission charges were asked for, the quality and quantity of the data obtained limits its use. Of the limited data available (eleven responses), admission charges ranged from £1.00 to £5.00. Such figures compare with the range of average admission charges detailed by Star UK (2003b), at between £2.68 and £6.73. Eight of the eleven respondents charge between £3.00 and £4.00. Admission charges for children ranged from £1.00 to £3.00 (data from nine responses).

5.1.13. Visitor capacity and the desire for increased visitor numbers.

The majority of recreation businesses (forty-one of fifty businesses) have the capacity to accept more visitors, and the majority of those would desire more visitors. Whilst a few businesses have limited capacity, six (of forty-nine) did not want an increase in visitors. Comments regarding visitor capacity are detailed in Table 117 (Appendix Two). It should be noted that although the number of overall questionnaire returns from each of the three study regions was similar, the majority of responses regarding the desirability of more visitors came from Somerset, as do the responses regarding the importance of visitor income to many of the recreation businesses (Table 82 and Table 83). Such discrepancies may be a factor of the differing types of farming, and therefore farm income potential, within the three study regions. The less intensive agriculture within Somerset may engender a greater reliance on recreation income to maintain farm

viability. Should agricultural operations within the Fens or Humberhead Levels become less intensive as a result of on-going CAP reforms, then a similar situation could occur within those regions, with recreation and leisure potentially becoming an increasingly important contributor to local economies.

5.1.14. The use of grant-aid by recreation businesses.

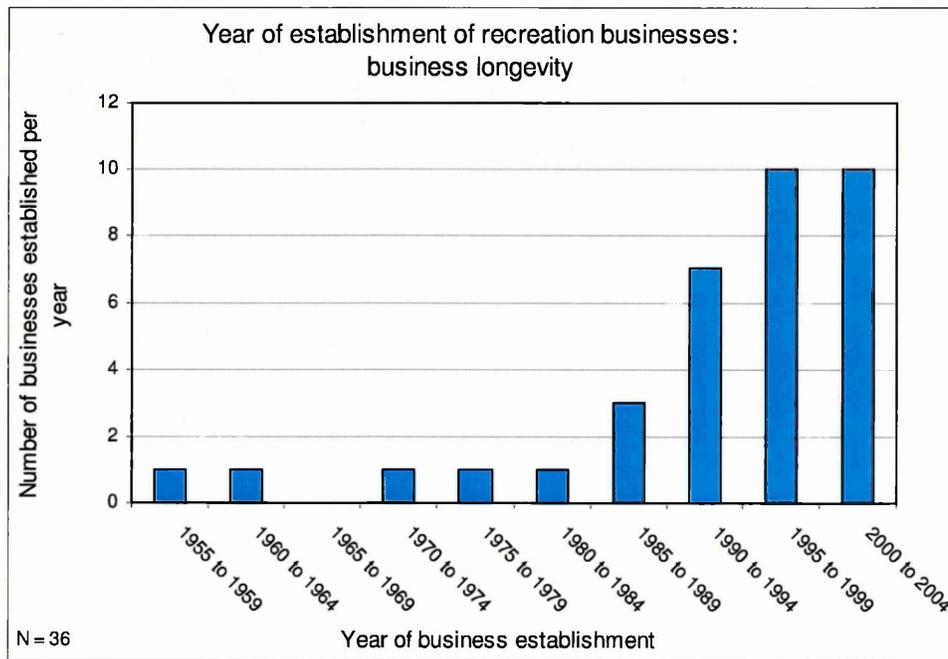
Of importance in establishing any business is the availability of finance. In respect of this, recreation businesses were asked to provide details of grant assistance received, if any. Of the forty-six responses, twenty-nine (63%) did not receive any grant aid. Descriptive responses regarding the obtaining or not of grant aid are detailed in Table 118 within Appendix Two. It should be noted that the difficulty of obtaining grant aid was given as a reason for limiting potential visitor numbers by some recreation businesses, as detailed in Table 117, with the complexities of obtaining grant aid and the completion of application forms also noted by Rotherham *et al.*, (2002b).

5.1.15. Business establishment and the longevity of recreation businesses.

As an indication of the development period and potential longevity of recreation businesses within the case study regions, the year of business establishment was requested. As Graph 64 shows, the majority of recreation businesses were established after 1985, with an increased establishment of recreation businesses within the case study areas after 1990. Similarly, and with respect to farm-based recreation attractions, Busby and Rendle (2000), citing English Tourist Board data, note that 85% of farm attractions were established after 1980. With the adoption of farm-based recreation activities noted by this research and within the literature (DARD, 2001; Nilsson, 2002; Roberts, 2002) as a means to increase income and maintain farm viability, in part related to the decline of agricultural incomes, such data should also be considered in respect of the overall rise in tourism and leisure activities, and increased public mobility, within the latter half of the twentieth century (Roberts, 2002). However, this considered, not only does the data identified suggest an increase in farm diversification activities as a means to increase farm viability, as illustrated in Table 82 and Table 84 and noted by Carter, (1999), McNally (2001), and DEFRA, (2004), but also that

recreation, leisure and tourism overall comprise an increasingly larger and important component of rural economies.

In viewing Graph 64, however, it should be noted the oldest recreation 'business' identified during data collection is not included on the graph. The National Trust established the Wicken Fen nature reserve, the UK's oldest nature reserve and now a visitor attraction, in 1899. The inclusion of this extreme data point would have introduced a bias to the data, thus lessening reliability.



Graph 64: Year of recreational business establishment (5 year increments).

5.1.16. Policy and related issues identified through data collection.

Several recreational businesses proffered views on policy aspects of visitor and tourism-related issues with respect to Government agencies, and the effects of policies on their businesses. Table 92 illustrates issues concerned with policy as noted by recreational businesses, and thus considered issues of concern, with Table 121 providing further information of policy issues and themes.

| |
|--|
| <p>Negative themes:</p> <ul style="list-style-type: none"> - Insufficient & prevention of brown, tourism road signs being erected (Highways Agency). - Council's interest in and poor understanding of tourism and resultant policy development. - Planning; lack of coherent policy to development regarding tourism/non-tourism uses. - Issues of insurance, liability etc. as required by regulations, limiting tourism potential. - Transport: discouragement of private vehicles, public transport availability, and priority use of waterways for commercial traffic; potentially limiting tourism potential. - Council over and inaccurate estimation of visitor numbers and demand. - Lack of coherent approach between government agencies/quango's. - Difficulty of obtaining grants. |
| <p>Positive themes:</p> <ul style="list-style-type: none"> - Benefit of brown road signs when permitted. - Benefits of ESA subsidies. - Assistance given by (Somerset) tourism agency to visitors. |

Table 92: Policy and related issues highlighted by recreational businesses.

5.1.17. Conclusion.

As with the analysis of the visitor surveys, an understanding of issues pertinent to recreation businesses was developed through the analysis of the recreation business surveys and data therein. As well as identifying issues of low but important visitor-related income to recreation businesses, with annual turnovers predominantly below £50,000, along with relatively low visitor numbers, issues relating to more intangible factors regarding aspects of the environment and case study region landscapes were identified. These included the importance of peace, tranquillity, big skies and associated sunsets. Furthermore, such factors were noted to be similar to those identified within the visitor surveys, detailed within Chapter Four. Environmental factors such as wildlife and water-related factors were also noted as important 'selling points' within the case study regions. Again, such data identified within the recreational business surveys concurs with those within the visitor surveys.

Recreation business consider a mix of attractions within their vicinity of more importance than do visitors. This seems contrary to the visitor survey findings, as detailed in Chapter Four. However, in many respects, recreation businesses' perceptions of their customers are in agreement with findings from visitor surveys. They suggest that visitors are older, with a liking for the landscape and wildlife with them, and with a propensity to stay for up to three days, depending on the visitor attraction, with day-visitors being the most predominant category. With issues of local employment, sales of local produce, and benefits to local services noted, the data illustrate potential economic benefits for local economies from visitor enterprises. This is in addition to existing rural

economies, as witnessed by the proportion of businesses which undertake more than one income generating operation.

Issues of policy on promotion of the case study regions as visitor destinations are noted from the findings. They are an issue for consideration by policy makers. The relatively low values of visitor income to recreation businesses' is critically important. This is particularly so for those recreation businesses with an agricultural-related primary income source, and as such is discussed in greater detail in Chapter Six. In response to these initial findings, the data collected and analysed prompted a follow-up survey of farm-based recreation businesses to be undertaken. The findings of this secondary data gathering operation, and the discussion of overall recreation business findings, are presented in the following section (section 5.2.0.).



Photograph 8: A view of the Mendip Hills across the Somerset Levels and Moors.

5.2.0. Section Two: The economic contributions of recreation businesses - the importance and value of visitor-based income.

5.2.1. Introduction.

Environmental and ecological benefits aside, the potential for nature-based visitor attractions to contribute to local economies is critical to this research. Increased employment and income generation within rural areas is an increasingly important policy issue, with numerous initiatives being established to encourage rural viability (section 2.6.0.). The use of tourism and visitor attractions as generators of employment and income add an element of 'insurance' to rural economies by diversifying away from the more traditional and singular agricultural economic base. The more varied the economic base, the greater the propensity for economies to weather economic downturns in individual sectors. Further to this concept, however, is the potential for visitor spend to form an important and potentially critical, secondary income source for individual businesses, without which such businesses may not be viable. As such, the importance of rural visitor demand and spend is emphasised with respect to overall rural economic viability, and the benefits entrained within a diverse economic base.

In considering the benefits of a diverse economic base, by dint of the public popularity of the UK countryside, visitor attractions based around the landscape and wildlife have added advantages. They can be developed within the context of the existing overlying agricultural economy and land use. In conjunction with incentives, development of nature-based visitor attractions¹¹ need not impact adversely on current, rural economic generators, namely agriculture, but instead can take advantage of existing situations and opportunities. They then contribute to rural income and employment, rather than substituting existing income and employment contributions.

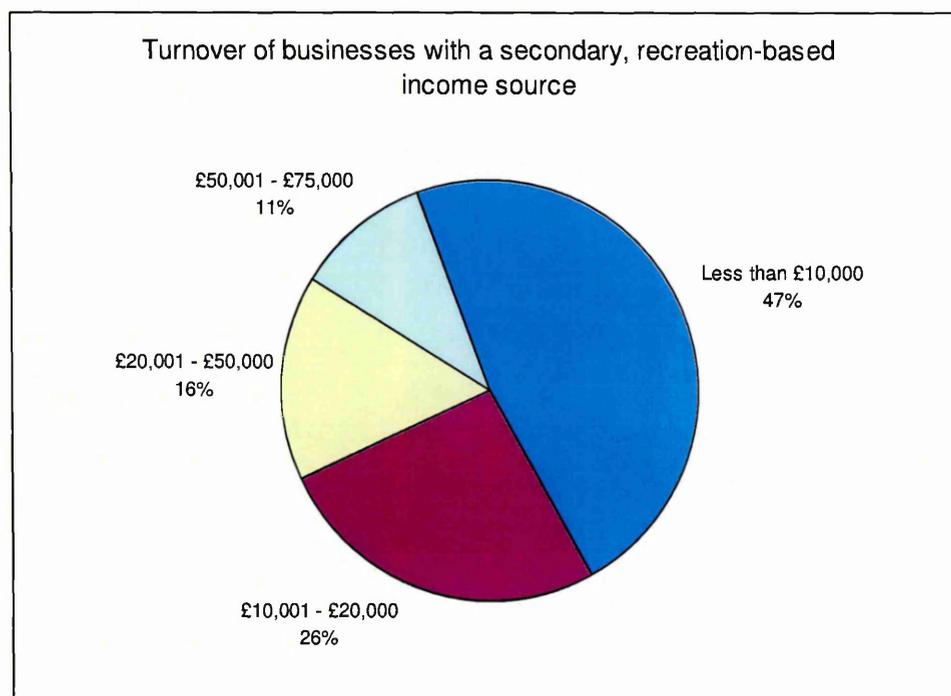
With respect to the collection and analysis of data pertaining to recreation businesses within the case study regions, attention should be drawn to the difficulties of identifying and locating those businesses. This extended to include the completion and return of the recreation business questionnaires (sections 3.5.1. and 5.0.2.). The total number of

¹¹ For the purposes of this research, such businesses are those with a flora or fauna element to their operation, e.g. wildlife reserves, or attractions dependant on the rural or 'natural' environment as a factor of their operation, i.e. activities such as fishing, equestrian, watersports/boat use, and including accommodation, food and drink suppliers and rural museums, as illustrated in Table 77.

recreation businesses within the case study regions was unknown but identified as far as practical (sections 5.0.3. and 5.2.5.1). So whilst considered acceptable, there are some concerns over the limited sample size.

5.2.2. Farm income and the importance of secondary, visitor-based income.

As detailed in section 5.1.2. and illustrated in Graph 47, the majority of recreation businesses initially surveyed have turnovers of less than £75,000, at 68.3%, with the majority, 63.4% (twenty-six of forty-one) having turnovers of less than £50,000. As a comparative figure, the threshold for paying VAT on taxable supplies is £58,000¹² (HM Customs and Excise, 2004). Furthermore, the turnover for all initial businesses surveyed (i.e. excluding businesses surveyed within the later, follow-up survey) with recreation income as a secondary form of income was below £75,000, with 47% of these businesses having a turnover of less than £10,000, Graph 48 and Graph 65. Thus such businesses are relatively small-scale.



N = 19.

Graph 65: Overall turnover ratios of businesses with recreation-based, secondary incomes.

(Initial recreation business survey data only).

¹² It should be noted that some business operators may deliberately keep their business turnover below the VAT threshold as a means of simplifying business operations and reducing customer costs through not charging VAT.

Of the initial recreation businesses with a secondary source of income surveyed, 82.6% considered this income important. Of these businesses, 68.4% gave farming and farm-related business as their primary source of income. Thus whilst important to the majority of recreation businesses, the results suggest that secondary incomes are frequently important to sections of the farming community, and in particular, those sections with a low turnover. As a note of comparison with respect to farm diversification and secondary income generation, research undertaken for MAFF during the 1980s revealed that 42.4% of UK agricultural holdings undertook some form of diversification activity, with this proportion rising to 58.3% during the 1990s. Of these, 24% provided accommodation and catering services to the public, with almost one quarter of diversified holdings being involved within recreation and leisure services (CRR, 2003). Whilst these figures not give an indication of the importance of diversification-related income compared to farm income, nonetheless, that such proportions of farms are diversified implies a need to generate extra income.

Comments made by recreation businesses surveyed, Table 82 and Table 84, illustrate the importance of the recreation-based income. Further to the income itself is the relative proportions of recreation-based income to overall household income, also detailed in Table 82. Whilst a higher income will be important simply due to its value, the data suggests that even low proportions of recreation-based income are important to many farm-based recreation and visitor facility providers, more so when associated with a low overall turnover.

5.2.3. Secondary, follow-up farm-based recreation business survey.

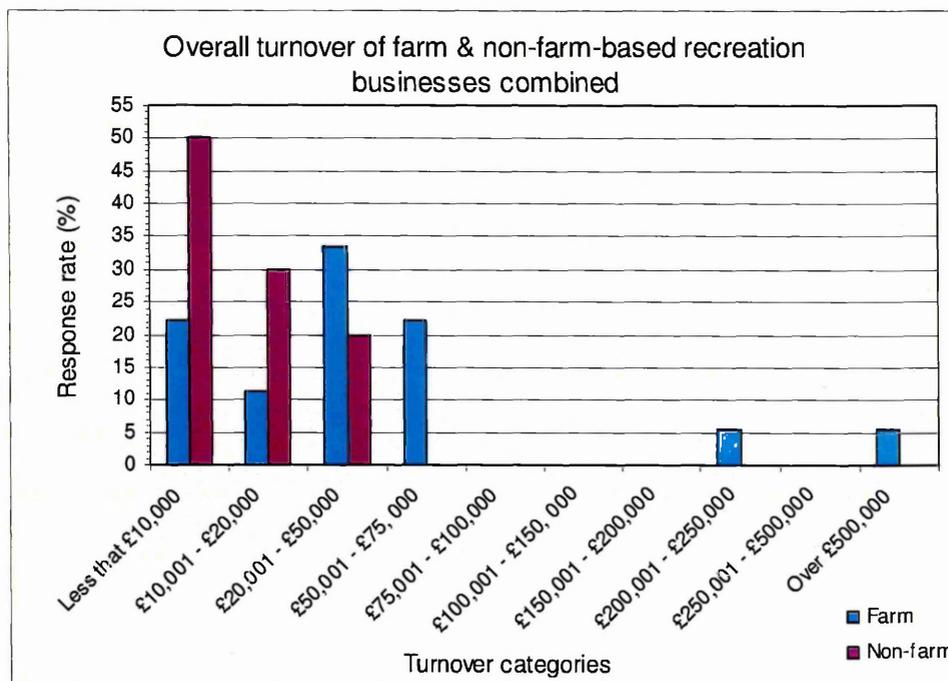
Data collected during the initial postal survey of recreation and visitor businesses indicated that income derived from recreation and visitor-associated secondary businesses, was comparatively low in both turnover and proportion of household income. However, it was shown to be important to the overall viability of many of the businesses surveyed. This importance was to the extent that some businesses believed that without the visitor-based income, their way of life and current business would be severely curtailed. Many of those expressing this opinion were either farmers or involved within the agriculture sector. Thus a follow-up, telephone survey was conducted to investigate further the importance of visitor-based income as a secondary

income in relation to the viability of farms diversifying into the visitor and leisure markets.

Located using the same procedure described within the methodology (section 3.4.11.), thirty such businesses were identified within the Humberhead Levels and the Fens. Of these thirty businesses, twenty completed the survey via telephone, three were no longer working farms and thus discounted from the survey, one had free-access nature trails as part of their organic farm business but no visitor-based income, and one had recently retired from providing accommodation. Contact by phone and e-mail with the remaining five businesses failed.

5.2.4. Follow-up survey results.

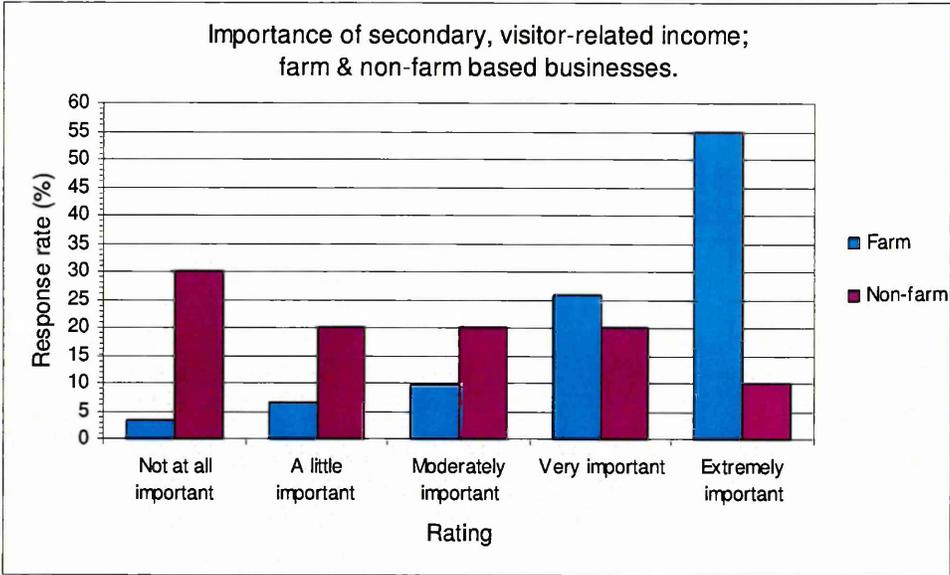
The follow-up survey of farm-based recreation businesses revealed two businesses (10%) with turnovers of between £200,000 to £250,000, and over £500,000 respectively. Of the remaining farm-based businesses which provided information, however, all had turnovers below £75,000, although this data is limited to nine samples. Other businesses either declined information, or were too new to provide information. In conjunction with data collected during the original recreation business survey, the overall turnover of all businesses with secondary, recreation-based income is also still comparatively low, with 78.57% of turnovers below £50,000 *per annum*, Graph 66.



Farm: N = 18.
 Non-farm: N = 10.
 Combined survey data.

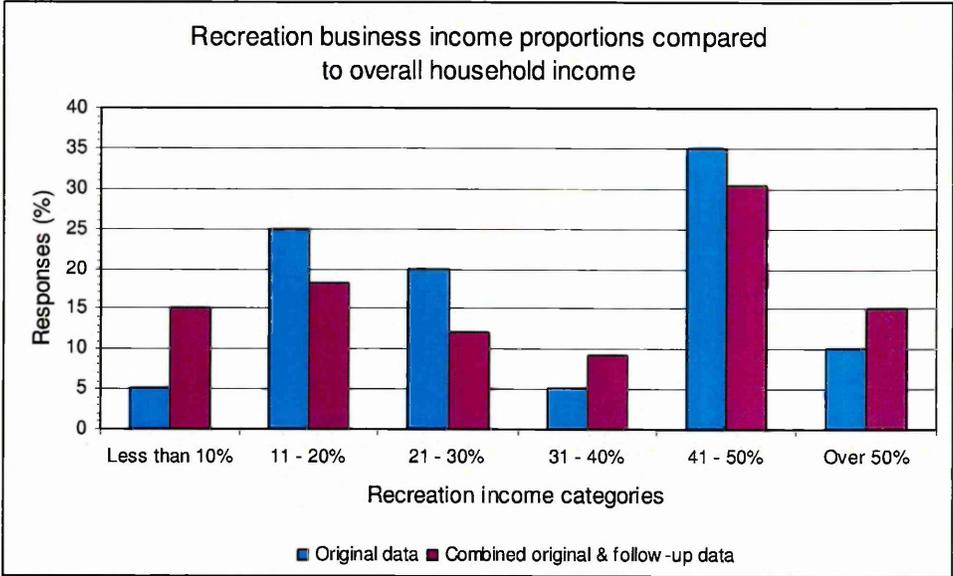
Graph 66: Overall turnover of secondary, farm & non-farm based recreation businesses.

As with data obtained within the original survey, the importance of recreation income to farm-based business is noted, with data from both surveys combined and illustrated in Graph 67. The proportions of recreation-based income compared to overall household income are also noted within Graph 68. As can be seen, the addition of the follow-up survey data accentuates the lowest, 'under £10,000' and over 50% categories, but generally mimics the original survey data. Taken in conjunction, Graph 66, Graph 67 and Graph 68 suggest great importance is placed on the recreation-based income, even though such income is generally low both in actuality and in proportion of overall income.



Farm: N = 30.
 Non-farm: N = 10.
 Combined survey data.

Graph 67: Importance of secondary, recreation-based income.



Original survey data: N = 20.
 Combined survey data: N = 33.

Graph 68: Original and follow-up survey data - recreation income proportions.

Further to the importance of the secondary, recreation-based income are the effects of the loss of that income. Descriptive comments detailing the effects of this loss for the businesses originally surveyed are detailed in Table 82. Responses obtained during the secondary survey of farm-based recreation businesses include:

"Would be absolutely skint"

"Visitor income helps a lot".

"Not making any money in farming".

"Difference between a fair lifestyle and none".

"Have to move if lost this income".

"Couldn't survive without (this) income - ice-cream, shop etc. the mainstay of the farm".

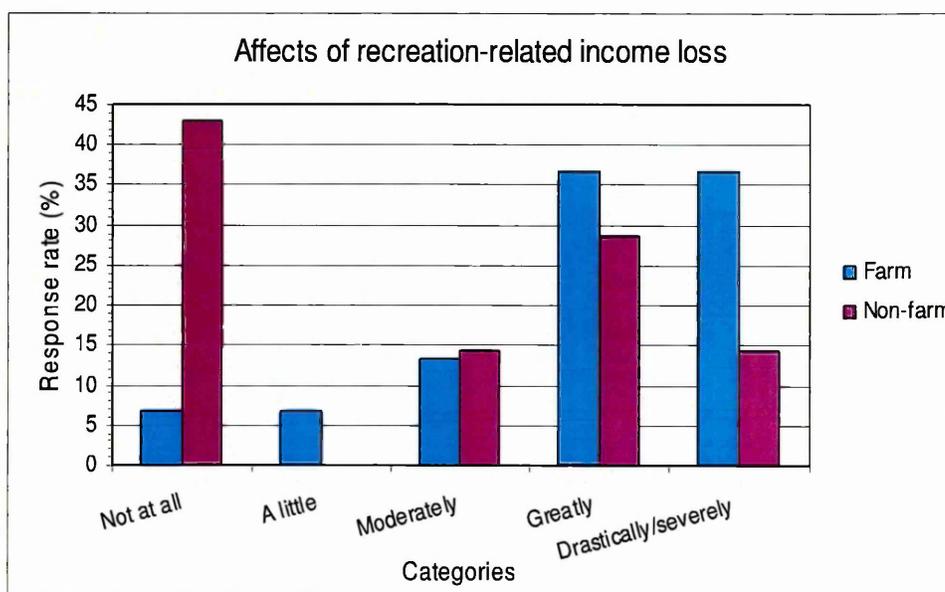
Personal interview communications, 13/5/2005. Not verbatim.

As might be expected, those who consider the income from recreation more important are those who also consider the potential loss of that income important, Table 93 and Graph 69. In particular, Graph 69 shows the importance of the loss of recreation to farm-based recreation businesses.

| | | Affects of loss of recreation income | | | | | Total |
|---------------------------------------|----------------------|--------------------------------------|----------|------------|---------|----------------------|-------|
| | | Not at all | A little | Moderately | Greatly | Drastically/severely | |
| Scale of recreation income importance | Not at all important | 3 | | | | | 3 |
| | A little important | 2 | 1 | | | | 3 |
| | Moderately important | | | 3 | 1 | | 4 |
| | Very important | | 1 | | 3 | 5 | 9 |
| | Extremely important | | | 2 | 9 | 7 | 18 |
| Total | | 5 | 2 | 5 | 13 | 12 | 37 |

Combined survey data.

Table 93: Importance of recreation income compared to the loss of that income.



Farm: N = 30.
Non-farm: N = 7.
Combined survey data.

Graph 69: Affects of recreation income loss.

5.2.5. Statistical confirmation.

Although the sample numbers contained within the above combined survey data were low at a maximum of forty-one, and thus may affect statistical reliability, they compare with Meert *et al.* (2005), who adopted a sample of forty-nine in studying farm survival strategies, and also Morrison and Teixeira (2004), who used a sample of twenty-two to investigate small tourism businesses. Mann-Whitney statistical tests were therefore undertaken to determine statistical reliability, the results of which are detailed in Table 94. Whilst the scale of recreation income importance and combined turnover do appear to be statistically reliable, proportions of income and the loss of income data are presented as less reliable. As noted, the small sample size may have influenced the outcomes, as may the use of less sensitive, non-parametric tests suitable for categorical data. Although the statistical reliability of the data are therefore questioned, nonetheless, to those individuals and businesses involved, the information provided by them during the survey is important with respect to their livelihoods. Therefore whilst on a regional scale the data reliability could be questioned, on a personal level, the data is important irrespective of its statistical reliability, and in conjunction with qualitative data collected, adds weight to the overall research. Furthermore, the sample size as a proportion of the potential, maximum population is unknown. Thus whilst the sample numbers are small, it may be that the overall population is also small. Without suitable data to provide an indication of the total population number available to sample, the lack or not of statistical reliability of the limited sample population is more difficult to question.

| | Scale of recreation income importance | Proportions of recreation income to household income | Affects of loss of recreation income | Approximate combined turnover |
|---|---------------------------------------|--|--------------------------------------|-------------------------------|
| Mann-Whitney U | 57.000 | 87.000 | 73.000 | 43.000 |
| Degrees of freedom (<i>df</i>) | 40 | 32 | 36 | 27 |
| Z | -3.140 | -1.121 | -1.295 | -2.329 |
| Asymptotic Significance (2-tailed) (<i>p</i>) | .002 | .262 | .195 | .020 |

Table 94: Mann-Whitney statistical tests for follow-up survey data.

5.2.5.1. A note on sample size and difficulties of assessing overall recreation business numbers.

As noted within section 5.0.3.1. with respect to the survey sample size as a proportion of the overall recreation business population, identifying the total number of potential businesses to be surveyed is neither simple nor straightforward. Such difficulties are not only limited to recreation and leisure businesses, but encompass all businesses within the UK, whether on a national or regional scale and regardless of business sector. The Department of Trade and Industry (DTI, 2004) note that there is no single source for data on the number of businesses in operation within the UK. Whilst the Inter Departmental Business Register (IDBR), through the use of VAT registrations, VAT de-registrations and pay-as-you-earn data, assesses the performance of 99% of the UK's economic business activity, such assessments account for only 2.1 million of the estimated four million businesses within the UK. The remaining un-assessed 1.9 million businesses comprise of businesses operated by the self-employed, businesses without employees and businesses with low turnovers (NSOL, 2005b).

In many respects, such businesses fit the profile of the recreation businesses identified and surveyed during this research, and are therefore difficult to identify. Thus, whilst a more comprehensive method of accounting for such businesses within the case study regions would have been desirable, enabling a more accurate estimation of the potential recreation business population to be determined and a larger sample population compiled, lack of available information prevented this. As such, the use of the internet, advertising material, and word of mouth, i.e. the snowball method, as described within sections 3.4.2. and 3.4.11., determined the identification of recreation businesses surveyed. With many such businesses being operated on a part-time or hobby basis, and or part of a diversified business portfolio, and thus not necessarily advertised within local tourism organisation literature nor detailed on government agency listings, the sample size used, and in considering the time and cost constraints of the research, gains greater credence.

5.2.6. Relative importance of recreation income.

With the importance of secondary, recreation-based income identified during the initial recreation business survey, the follow-up survey asked about the increased or decreased

relevance of recreation-based income compared to overall farm income in recent years. As such, changes in the relative levels of importance between recreation-related income and 'traditional' farm income could be ascertained, and thus the overall importance of recreation-related income to farm and agricultural holdings considered.

The data demonstrated that, whilst there were those who were happy at their present level of operation, the majority, 65%, expressed an increased importance for recreation-based income compared to the recent past and/or expectations for the future. Of the two businesses (20%) who gave a decreased importance for their farm-based recreation business, one commented on the decline in pick-your-own fruit as a recreational activity, whilst the second gave increased importance to their recreation boat-trip business, with rented farm accommodation becoming less important within the overall business portfolio. Although not specifically asked within the questionnaire, 45% of the follow-up survey respondents commented that the decline in agriculture and associated income were instigators in the decision to enter the farm-based recreation business. Table 95 summarises responses obtained during the follow-up survey on the importance of farm-based recreation income and reasons for embarking on such enterprises. These comments concur with those obtained during the original recreation business survey, Table 82 and Table 84.

| Region | Comments |
|--------------------------|--|
| Humberhead Levels | <p>Became more important..., as an addition to income, but also for pleasure. Enables things to be bought for the house.</p> <p>Increased importance, & likely to become more important. Would struggle to survive without it. Helps maintain farm.</p> <p>Becoming more important than farming income. Provides income when nothing coming into farm.</p> <p>Increased in importance. Can't make a living from the farm.</p> |
| Fens | <p>Started due to low farm income, so diversified.</p> <p>Very important. Was not important but changed as farming declined. Became more important.</p> <p>More important, & more importance per year.</p> <p>Happy at current level. Any increase means greater expense.</p> <p>Looking to increase, becoming more important. Started due to change in agriculture.</p> <p>Needed another income source. Looking at ways of keeping family farm going.</p> <p>Increased importance. Wouldn't have gone into visitor side if farm had been making a living.</p> <p>Decline in agriculture lead to accommodation.</p> |

Personal interview communications, 13/5/2005. Not verbatim.

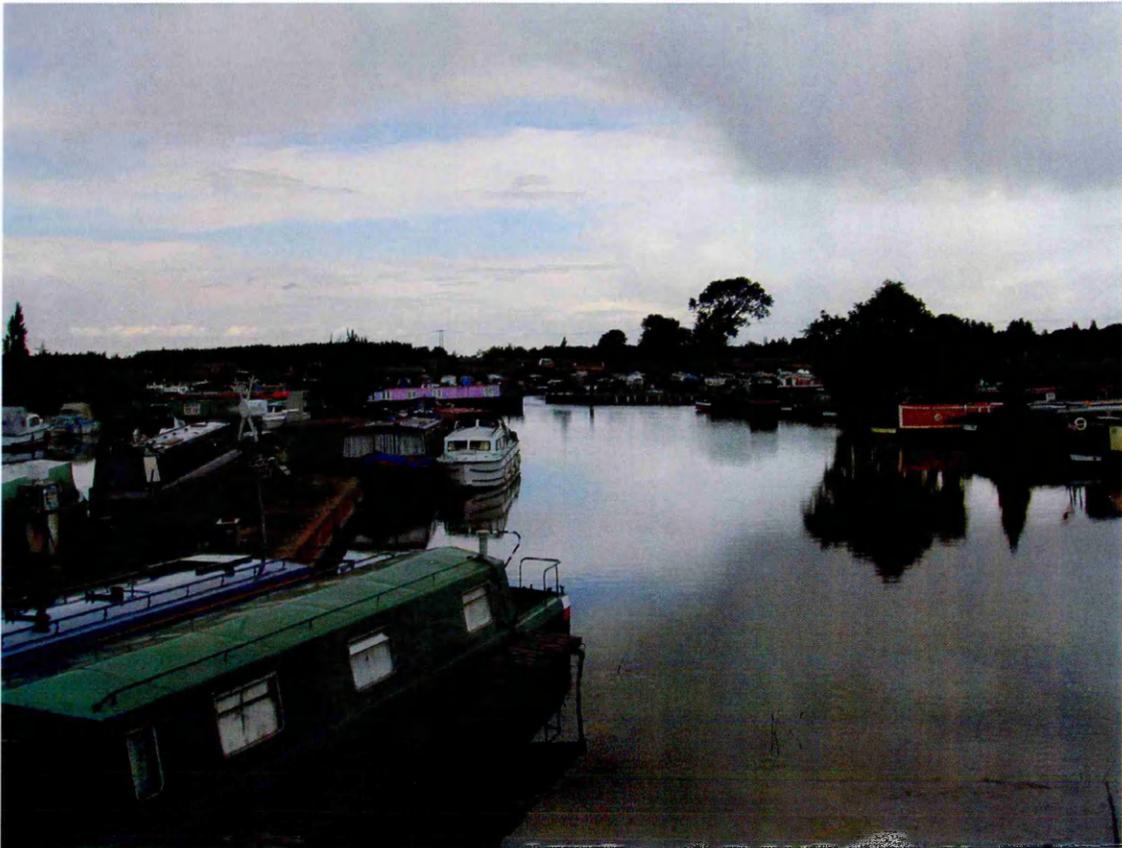
Table 95: Follow-up survey descriptive responses.

5.2.6.1. Recreation income and rented farm land.

Although again not asked for during the follow-up survey, five (25%) respondents commented that they either rent out their farm land to tenants, or were considering doing so. Thus they themselves no longer farm, instead gaining income from tenancies and recreation-visitor facilities. Although little information was gained with respect to this, inference from comments made seem to suggest that a greater income can be made through rents and recreation than actual farming. Thus whilst the land is still farmed, the landowners may have less control over its management and use, with consequences for wider landscape management. As well as financial considerations, letting land may also be life-style orientated: "*farming*", noted one Fenland landowner now letting land to relatives, "*was hard slog*".

5.2.7. Conclusion.

Data collected by the original recreation business survey were supported by the findings of the follow-up recreation business survey. The research identified comparatively low levels of visitor income and the importance of this income to all businesses surveyed. Critically, the research also identified the importance of low levels of visitor-derived income to those businesses involved within recreation as a secondary income source, including farm-based recreation businesses. Of such businesses, 78.57% had turnovers below £50,000 *per annum*, with many such businesses describing visitor-derived income as vital to their business viability. Such comments and income values, corresponding as they do to the low levels of visitor spend identified within Chapter Four, are contrary to the high value of visitor spend often implied as necessary for tourism-related regeneration. This was considered in the literature review (Chapter Two). As such, this importance is discussed in greater detail with respect to farm and rural viability in Chapter Six.



Photograph 9: Bill Fen Marina, Ramsey, The Fens.

5.3.0. Section Three: Recreation business findings and the literature.

5.3.0.1. A note on the inclusion of accommodation earnings within the research findings.

As noted in CRR (2003), farm diversification contains many forms, and whilst the approximate one quarter of farms who diversify into the recreation and leisure market are of consideration for this research with respect to secondary farm incomes, added to this are those businesses, farms or otherwise, that offer accommodation. Although not strictly a recreational activity, nonetheless, with 25% of visitors identified as staying overnight, accommodation demand related to visits to wetland bird reserves is noted. Anecdotal comments from visitors surveyed indicated overnight stays in conjunction with visits to several bird reserves within the vicinity of the Fens and Norfolk coast, with similar comments made by accommodation providers in the vicinity of WWT Welney. Accommodation demand is therefore related to nature-based recreation and leisure. With CRR (2003) noting that 24% of diversified farms entered the accommodation sector, as a source of rural income, accommodation therefore takes increased precedence and is thus considered an important aspect within the research. As such, the recreation business findings, including findings on accommodation, are detailed below.

5.3.1. Farm-based recreation income.

McInerney and Turner (1991, in Mills *et al.*, 2000) note that in 1991, farm-based accommodation provided an average turnover of £4,800, at a profit of 15%. This equates to an approximate profit of £720 at 1991 values. As in Sharpley (2002a), McNally (2001) suggests that farm diversification enterprises, with the exception of farm retailing, contribute little to net farm income. Whilst this is questioned as a result of the data collected during this research, and may be so in terms of monetary value, neither author comments on the importance of that income. Predominantly but not exclusively farm-related businesses, Graph 68 illustrates that for 45.5% of businesses with a secondary source of income, recreation-based income exceeds 41% of overall household income, which could perhaps be considered slightly more than 'little', unless

the overall income is low, which Graph 48 and Graph 66 suggest it is. Furthermore, although the actual monetary value of turnover and income may be low, what that turnover contributes to the viability of the whole business may be vital, without which the business may not survive. The importance of such incomes is noted in the responses provided by those interviewed, Table 95 and Table 82, and illustrated in Graph 69, with income generation, small as it is, being noted by McNally (2001, p.248) as the "*most important motivating factor*" in diversification activities.

The often small financial return associated with farm-based recreation, visitors and tourism is also noted by Roberts, (2002), Nilsson (2002), and DEFRA (2004), whilst DEFRA (2005a) comments on the often small-scale and limited return on farm diversification ventures in general within England, at an approximate combined output of 5% of farm output overall. DEFRA (2005a) also note that 63% of farms with diversified activities receive less than £10,000 output from that activity. The marginality of such enterprises is further noted by DEFRA (2004) observing that an estimated 10% of visitor facility providers have net profits of below zero, with CRR (2003) suggesting around one in eight diversified farm businesses make a loss. CRR (2003) also report that over 80% of diversified agricultural businesses within England receive an output below the mean of £25,500¹³, whilst half of all such enterprises make less than £2,500 profit, with the greater number of small enterprises being overshadowed by a relatively few large-scale businesses. In particular, those businesses diversifying into the leisure sector, including farm tourism, tended to be small-scale with correspondingly low profits. DEFRA (2004) give average net profits per annum of between £2000 and £4000, and in many instances considerably less, within the English South-west for farm-based accommodation and recreation providers. With such low values noted, CRR (2003, p.xiv) suggest that diversification enterprises represent a "*minor income source*" for overall farm income.

Average profit ratios noted by CRR (2003) for all diversified enterprises are 27.8% (net profit as a percentage of enterprise output), with profit margins for equine enterprises, an increasingly popular activity within the Humberhead Levels (Rotherham *et al.*, 2002b), being 64%. Net profit levels for accommodation and catering, and recreation and leisure, are 61.9% and 43.2% respectively. However, as Carter (1999) and CRR (2003) note, there is often a 'doubling up' of resources on farms, such as labour, land

¹³ Assumed to be *per annum*, although not identified as such.

and building use, which is often unrepresented in statistics. If these imputed costs are accounted for, then profit ratios are reduced by as much as 40% for all diversified enterprises within the UK, reducing the average net profit from £9,474 to £5,793, with equine enterprise profits suffering most from the inclusion of imputed costs (CRR, 2003). However, with such imputed cost factors already being present on the farm, it could be argued that a recreation enterprise is maximising an underutilised resource, and that any income thus generated is a greater return on existing investment.

Such turnover and profit figures, taken in context with the descriptive comments and importance placed on recreation and visitor income noted by this current research and within the literature (Busby and Rendle, 2000; Nilsson, 2002; Meert *et al.* 2005), belie the apparent insignificance and unimportance of income generated through agriculture and farm-based recreation. Whilst such statistical observations correspond with the low turnover rates identified during this research, CRR (2003, p.xix) nonetheless note that tourism and leisure

"appear to be very useful adjuncts to a farm business.....generating above average net margins and very good net profit margins also".

Thus, in spite of low turnovers, profit and income so generated may represent an equal or greater return on investment than traditional agriculture, particularly during agricultural decline (CRR, 2003). Such a situation is enhanced should a diversified, secondary recreation business be able to generate a relatively high profit from a low turnover. Of greater importance, however, is the propensity for profit so generated to assist in the maintenance of farm viability, regardless of its financial worth, as illustrated in Figure 12.

Further to diversified income contributing to overall farm income, DEFRA (2005a) also note such potential, suggesting that diversified income can equate to one third of core farming income, and approximately one fifth of total income for farms with diversified income sources. That diversifying can aid farm cash flow and provide an income supplement is not unrecognised, with numerous articles referring to this, and particularly farm tourism (Carter, 1999; DARD, 2001; Walford, 2001; Roberts, 2002; Nilsson, 2002; Meert *et al.*, 2005). It is, however, the descriptive comments obtained during current research which are perhaps more telling. In addition to Table 95, Table

96 details comments regarding the importance of recreation-based income to those farms surveyed.

| Region | Comments |
|---------------------------|--|
| Humberhead Levels | Very (<i>important</i>). Enables buying of food & clothes. Very important: needed for general living expenses. The maize maze creates more income (<i>from visitors</i>) than the farm. B&B and livery 'forced' on them by drop in farm incomes. |
| Fens | To provide part-time wage & to supplement pensions due within 10 years. Couldn't do without it. Dairy farm not viable in the end. Husband wants to keep farming, & accommodation enables this. 300 acres, but needs B&B, self-catering accommodation to survive. |
| Somerset Levels and Moors | As Farming doesn't pay - the B&B and self-catering is a good source of income. We wouldn't be here (<i>without recreation income</i>). Propping up the farm! Very important - as dairy farm & milk price is poor. Very important as we have a dairy farm.....the income is not sufficient to cover hours worked.....it is likely the holiday trade could become our primary income. 70 dairy cattle: not enough to make a living. On weekends, 50% of customers are visitors - be in trouble without them. (<i>PYO fruit</i>). B&B props up business - couldn't do without it. |

Responses from original and follow-up surveys.
To be viewed in conjunction with Table 95.

Table 96: The importance of farm-based recreation income.

Comments contained within Table 95 and Table 96 illustrate the importance of recreation-based income in maintaining farm viability. Such observations have also been noted in the literature. Whilst Banaji (1980, in Carter, 1999) acknowledges the role of multiple income sources as a means of survival in small-scale agricultural ventures, Nilsson (2002) notes that farm tourism is good for local economies and as a means to continue farming, with additional income generation also being noted. Nilsson also gives examples of income proportions generated from farm-based tourism, ranging from 20% to 90%. Busby and Rendle (2000), citing earlier studies, comment on farm tourism income being greater and more reliable than farm income, with 26.7% and 12.8% of dual-income farms describing the importance of tourism income as 'fairly important', and 'very important' respectively. Meert *et al.*, (2005, p.81) suggest that many financially marginal farms are "*forced to seek survival strategies*" due to limited income potential from the core agricultural business, as noted during this research. Clearly, when the income from recreation, visitors or tourism greatly exceeds that of the original agricultural business, as in the examples provided by Nilsson (2002) and Busby and Rendle (2000), then agriculture is likely to become secondary as an income source priority, and may only be continued because it provides the setting for the more lucrative visitor income (Nilsson, 2002). However, as identified in this current research and noted by Nilsson (2002) and Roberts, (2002), farm-based recreation and tourism

may simply enable farmers to keep on farming, and as such is a "*symbiotic*" means to an end, where neither farming nor tourism are independently self-sustaining (Roberts, 2002, p.199). As Busby and Rendle (2000, p.640) note:

"For most farms, tourism does not bring in a large revenue stream; rather it is about providing income which can make the difference between viability or not".

As such, recreation, visitor income and tourism can therefore play a crucial role in the management of the landscape through the support of the potentially less financially important agricultural sector, upon which much visitor satisfaction depends. With many recreation-based businesses within the study regions being established within the previous 10 years, Graph 64, a visitor demand would seem apparent, as noted within the research, and thus visitor income is likely to be of growing importance.

5.3.2. Recreation and visitor-related employment potential.

As well as income generation, employment potential and thus the dissemination of earnings within economies is considered an important aspect of the research. Without such dissemination, little economic benefit is accrued within local communities and the viability of those communities could therefore be reduced. However, in similarity with farm tourism, recreation businesses based around the managed landscape have the potential to diversify the economic and employment base, thus benefiting rural communities through decreased reliance on one economic sector (Roberts, 2002). Although tourism and leisure employment is often considered a low pay, low status option (Fleischer and Felsenstein, 2000; Wilson *et al.*, 2001), nonetheless, tourism can provide an alternative to declining industries as an employer, with the often part-time, seasonal nature of tourism employment preferred by some employees (Law, 2002). As such, local employment related to the development of nature-based recreation and leisure activities has the ability to increase the viability of local services through local employee demand and spend, thus increasing rural community viability and lessening potential for outward migration and consequential community decline.

Data collected during surveys indicates that 75.6% and 60% of businesses surveyed employ permanent full and part-time staff respectively, with 31.1% employing temporary part-time staff, Table 85. Of these employees, 89% live within five miles of their place of employment, and thus for the purposes of the research are considered 'local'. This compares with the average distance travelled to work within England of 8.32 miles, whilst for rural regions such distances are approximately twelve miles, depending on population density (NSOL, 2005a). Whilst the majority of businesses surveyed employ between one and four people, Graph 52, higher employment figures have been obtained, Table 97. Thus, with considerations of income retention, the high proportion of local employees retains much income within the local economy, thus creating positive economic multiplier effects (Dudding and Ryan, 2000). Whilst an individual business may have little employment impact, collectively, a cluster of businesses could contribute greatly to local employment opportunities.

| Region | Reserve | Employee numbers | | |
|--|---------------------------------------|------------------|-----------|-----------|
| | | Total | Full-time | Part-time |
| Humberhead Levels | Parsonage Country House Hotel | 56 | 27 | 29 |
| | Goole Boathouse | 5 | 4 | 1 |
| | Ashcroft Lodge Guest House | 2 | | 2 |
| | Rush Farm B&B | 2 | 2 | |
| | East Farm B&B | 2 | | 2 |
| | Thornhurst Manor | 34 | 12 | 22 |
| | Boston Park Farm | 8 | 2 | 6 |
| | Owston Hall | 40 | 20 | 20 |
| | Brockholes Farm | 60 | unknown | unknown |
| | <i>Humberhead Levels total</i> | 209 | 67 | 82 |
| Fens | Orchard View Caravan & Camping Park | 3 | 1 | 2 |
| | Pinchbeck Engine Museum | 3 | | 3 |
| | Virginia Lake Touring Park | 7 | 1 | 6 |
| | The Farmland Museum & Denny Abbey | 5 | 1 | 4 |
| | Fish & Duck Public House | 3 | 1 | 2 |
| | Cross Keys Riverside House | 5 | 3 | 2 |
| | Denver Windmill | 16 | 1 | 15 |
| | Bridge Boatyard | 10 | 7 | 3 |
| | Caves Farm Barns | 3 | 2 | 1 |
| | Common Right Barns | 2 | 1 | 1 |
| | Chestnut Farm Shop | 10 | 3 | 7 |
| <i>Fens total</i> | 67 | 21 | 46 | |
| Somerset Levels and Moors | Somerset Levels Basket & Craft Centre | 3 | 2 | 1 |
| | Double Gate B&B | 4 | 2 | 2 |
| | Unknown attraction | 22 | 17 | 5 |
| | Willows Garden Centre & Café | 14 | 3 | 11 |
| | Muchelney Pottery | 4 | 2 | 2 |
| | Bowdens Caravan Park | 8 | 4 | 4 |
| | Blackmore Farm | 4 | | 4 |
| | Un-named wildlife park | 6 | 3 | 3 |
| <i>Somerset Levels and Moors total</i> | 65 | 21 | 46 | |

Combined permanent & temporary employment figures.
Does not necessarily include or exclude business proprietors.

Table 97: Employment figures for surveyed recreation businesses.

5.3.2.1. Employment potential at nature-based recreation attractions.

As Rayment *et al.* (2000) note, visitors as customers for local businesses are important, providing the means to generate employment and income. As a nature-based attraction, PACEC (2004) observe that the National Trust's Wicken Fen reserve is the largest employer in the village of Wicken and local area, employing twenty-five staff. With a mix of full-time, part-time and seasonal staff, this equates to 14.5 full time job equivalents (FTE). It is also noted that without visitor income, employee numbers would be reduced. Further to this, local B&Bs and the local pub receive the benefit of visitors to Wicken Fen, who account for up to 50% of their trade. Thus induced employment and income is generated. Due to the manner in which the National Trust operates, a regional office undertakes some administrative tasks for Wicken Fen. Fifty staff are employed at the National Trust regional office, and whilst not employed directly by Wicken Fen, nonetheless, a proportion of this employment is attributable to the operation of Wicken Fen reserve, thus adding to employment potential. Further to this, employment at a managed fenland site such as Wicken Fen can be similar to that of agricultural employment (Cranfield University, 1997).

With considerations of induced employment related to visitor demands, economic benefits are enhanced, although it should be noted that in rural regions with little industry, the multiplier effects related to induced and indirect benefits are considerably reduced compared to direct effects (Crompton, 1995). As a means of further illustrating the potential for employment and FTE numbers at similar nature-based attractions, and in consideration of the limited number of such attractions within the case study regions, Table 98 details examples of employment at nature-based attractions within the UK, with the data presented sourced predominantly through secondary research.

| Reserve | Employee numbers | | | FTE (if known) | Volunteers |
|---|------------------|-----------|-----------|-------------------|------------------|
| | Total | Full-time | Part-time | | |
| ¹ Wicken Fen | 25 | 10* | 25* | 14.5 | |
| ¹ RSPB Titchwell Marsh | 11 - 13 | 5 - 7 | 3 - 4 | 9 (estimated) | 30+ |
| ¹ RSPB Fowlmere Reserve | 6 | 1 | 5 | 1.334 | |
| ¹ Flag Fen | 3 | 3 | 0 | | 25 - 30 |
| ⁴ RSPB Ouse Washes | 10 | 7 | 3 | | |
| ² Holkam National Nature Reserve | 1 | unknown | unknown | 1 | |
| ² Brancaster Nature Reserve | 7 | unknown | unknown | 5 | |
| ² Blakeney Nature Reserve | 5 | unknown | unknown | 5 | |
| ² Norfolk Wildlife Trust (7 reserves) | 8 | unknown | unknown | 4.5 | |
| ² RSPB Titchwell & Snettisham | 14 | unknown | unknown | 11 | |
| ³ RSPB Forsinard Reserve | unknown | unknown | unknown | 3 | |
| ³ RSPB Minsmere | 23 | 18 | 5 | 20 | 38 |
| ³ RSPB Leighton Moss | 20 | unknown | unknown | 10 | |
| ⁴ RSPB Abernethy | 21 | unknown | unknown | 11.3 | 9 FTE equivalent |

NB: Some staff shared between reserves, so figures may not tally.

*Current research data.

¹PACEC, 2004.

²Rayment et al., 2000.

³Rayment & Dickie, 2001.

⁴Rayment, 1997.

Table 98: Employment numbers at UK-wide nature-based attractions.

5.3.2.2. Employment on farm-based recreation businesses.

Whilst considered a source of extra income, recreation-based activities on farms do not necessarily equate to extra employment. Although the follow-up survey did elicit the occasional reference to employment, this was in respect to keeping those already in employment, employed, whether family members or not. Carter (1999) suggests that farm-based diversification activities create little additional employment, with extra work being undertaken by existing employees or family members. Crompton *et al.* (2001) make a similar observation with respect to increased visitor demand on visitor facilities.

5.3.2.3. Employment within the wider locality and region.

Further to employment at visitor attractions is employment consequently induced within the wider economy, an important consideration within regeneration projects. Although positive multiplier effects have been noted in association with direct employment at visitor attractions, above, the sparse population within the Humberhead Levels is likely to reduce the potential for indirect and induced employment within the wider economy. Using the composite economic multipliers for low level economic activity at neighbourhood and regional levels, presented within English Partnerships 'Additionality Guide' (English Partnerships, 2004) of 1.05 and 1.3 respectively, for every ten jobs

within the nature-based recreation and leisure sector, one half of a job locally and three jobs regionally could be theoretically generated. Using the same multipliers, Table 99 illustrates potential induced employment numbers within the wider neighbourhood and region resulting from employment at identified and surveyed visitor attractions within the case study regions, as detailed within Table 97. With respect to Table 98 and a wider, UK perspective on the potential for induced employment at nature-based attractions, Table 100 further illustrates the potential for wider employment gains associated with nature-based visitor attractions within the UK, and thus the employment potential to be gained should similar attractions be established within the Humberhead Levels.

| Region | Total (direct) employee numbers* | Cumulative direct and induced** employment | |
|---------------------------|----------------------------------|--|---------------------------|
| | | Neighbourhood multiplier (1.05) | Regional Multiplier (1.3) |
| Humberhead Levels | 209 | 219.5 (10.5) | 271.7 (62.7) |
| Fens | 67 | 70.4 (3.4) | 87.1 (20.1) |
| Somerset Levels and Moors | 65 | 68.3 (3.3) | 84.5 (19.5) |

*Does not differentiate between full, part-time and temporary employment.

**Induced employment figures (in brackets).

Multiplier values based on low level economic impacts (English Partnerships, 2004).

Employment data per surveyed visitor attraction as detailed within Table 97.

Table 99; Calculated direct and induced employment potential from visitor attractions surveyed within case study regions, using low level economic multipliers.

| Reserve | Total (direct) employee numbers* | Induced employment | |
|---|----------------------------------|---------------------------------|----------------------------------|
| | | Neighbourhood multiplier (1.05) | Regional Multiplier (1.3) |
| Wicken Fen | 25 | 1.25 | 7.5 |
| RSPB Minsmere | 23 | 1.15 | 6.9 |
| RSPB Abernethy | 21 | 1.05 | 6.3 |
| RSPB Leighton Moss | 20 | 1 | 6 |
| RSPB Titchwell & Snettisham | 14 | 0.7 | 4.2 |
| RSPB Titchwell Marsh | 11 | 0.55 | 3.3 |
| RSPB Ouse Washes | 10 | 0.5 | 3 |
| Norfolk Wildlife Trust (7 reserves) | 8 | 0.4 | 2.4 |
| Brancaster Nature Reserve | 7 | 0.35 | 2.1 |
| RSPB Fowlmere Reserve | 6 | 0.3 | 1.8 |
| Blakeney Nature Reserve | 5 | 0.25 | 1.5 |
| Flag Fen | 3 | 0.15 | 0.9 |
| Holkam National Nature Reserve | 1 | 0.05 | 0.3 |
| <i>Cumulative direct and induced employment total</i> | <i>154 (direct jobs only)</i> | <i>161.7 (7.7 jobs induced)</i> | <i>200.2 (46.2 jobs induced)</i> |

*Does not differentiate between full, part-time and temporary employment.

Multiplier values based on low level economic impacts (English Partnerships, 2004).

Data sources as in Table 98.

Where a range of employee data was identified, figures are rounded down to the lower number within the range.

Table 100; Indication of induced employment potential from UK-wide nature-based attractions, using low level economic multipliers.

The use of part-time employees is likely to reduce multiplier effects, and the proportions of part-time employees detailed in Table 97 and Table 98 should be noted. Further to this reduction in induced employment potential, Leiper (1999) notes the propensity for fractions of jobs created through visitor demand to be combined to represent actual, full time equivalent jobs which do not actually exist, enhancing employment potential in a questionable manner. In a similar vein, Crompton *et al.* (2001) observe that increased employment demand can be met by existing employees, and by employees living outside of the region, reducing multiplier effects. Thus, whilst such employment multipliers are a useful guide, figures so obtained should be treated with caution. Whilst the use of low multipliers provides for limited employment and economic gain, nonetheless, the combined effect of several nature-based attractions and associated facilities is likely to have an important, local economic effect, potentially becoming a significant but largely hidden component of the local economy.

5.3.3. Selling the locality.

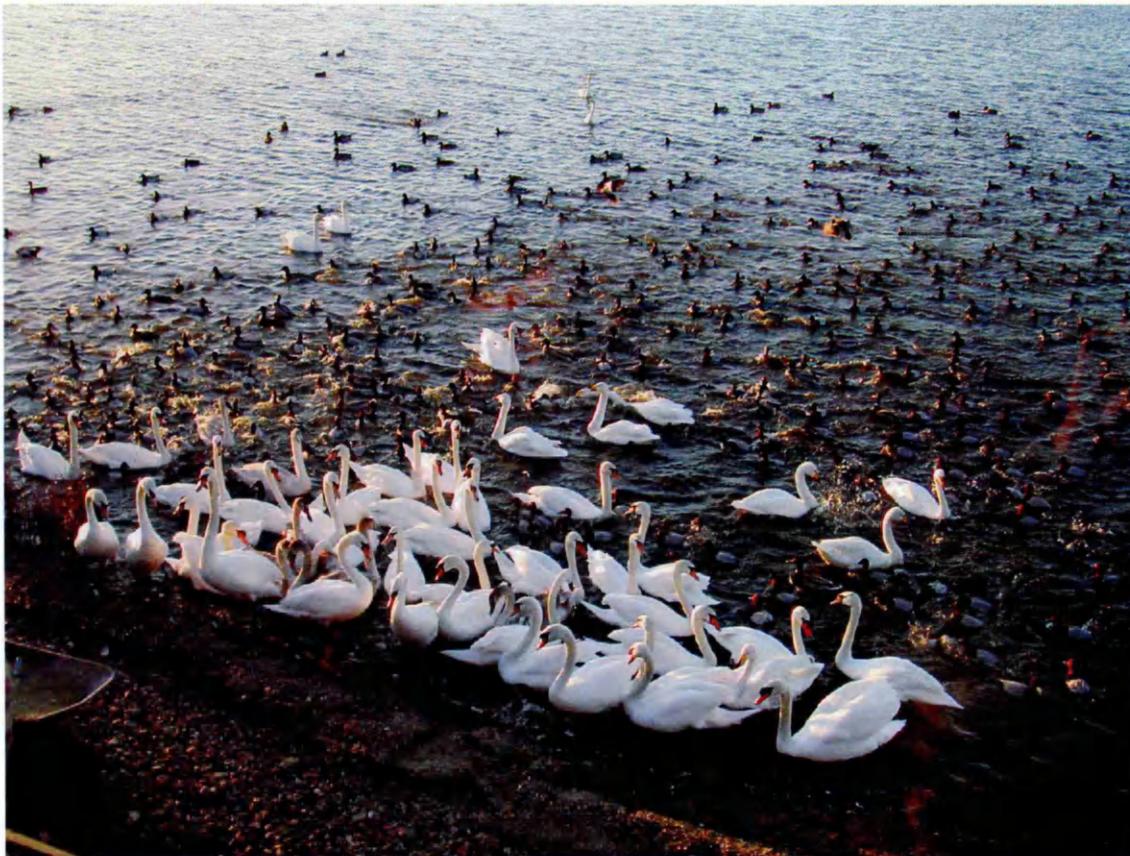
Whilst the economic aspects noted above constitute a critical element within the research findings, in order to precipitate such benefits, recreation businesses need to attract visitors. As identified through the visitor surveys and discussed in section 4.2.0., the landscape and elements within the landscape, such as wildlife, are important to visitors, and act as a visitor draw. Whilst businesses based around wildlife will market themselves as such, the use of landscape features, wildlife and other attractions are also used by more generic recreation businesses as reasons to visit an area. The importance of these, including local wildlife sites as marketing tools, are detailed in sections 5.1.5. and 5.1.7. Although perhaps obvious findings, nonetheless that such features are considered important by recreation businesses gives greater importance to the maintenance of an attractive landscape and the importance of a wildlife resource. Many of the elements referred to in marketing the study regions are similar to visitor responses given. Identified and discussed within the literature (Strumse, 1994a, 1994b and 1996; Kaltenborn and Bjerke, 2002; de Groot and van den Born, 2003), landscape as a visitor attractant is discussed previously in sections 2.5.0. and 4.2.0.

5.3.4. Conclusion.

With the low but important turnover of recreation businesses identified, particularly with respect to farm-based recreation attractions, noted within sections 5.1.2. and 5.1.3., and confirmed through the recreation business follow-up survey, the importance of visitor spend contributions to rural economies and therefore the management of the rural landscape through that spend is enhanced. Whilst literature (Sharpley, 2002a; McNally, 2001; Roberts, 2002; Nilsson, 2002; DEFRA, 2005a and 2004), noting the potential and use of farm diversification, including recreational enterprises, suggests that diversification enterprises have little impact on farm incomes overall, even to the extent of being non-profit making, the data obtained during this research suggests otherwise. Without such income, the findings of this current research suggest that many farms would cease to exist, with consequences for the management of the landscape and community viability. The importance of this visitor-related income and its potential impact of farm viability is discussed further within Chapter Six. Furthermore, whilst individual businesses have stressed the importance of visitor income to their operations, in addition to income is the potential for local employment related to visitor demand. Whilst such employment is noted as low, and with the constraints of tourism-related employment reviewed in the literature review (Chapter Two), the related economic effects nonetheless impact on the wider community in the form of demand for services, thus encouraging the maintenance of those services.

With the benefits of employment at wildlife attractions noted, and the benefits accrued by local services from visitors to those attractions, the research suggests that, based around wildlife, a visitor market can and does contribute in a small but significant manner to rural communities. As such, visitor attractions are dependant on an appropriately managed landscape acting as a visitor draw, with visitor perceptions of the landscape being a critical component of visitor enjoyment, as discussed within the literature review (Chapter Two). Without this, visitor appeal, irrespective of visitor attractions within a region, could be insufficient with respect to gaining visitor spend within the local economy. Thus, the findings of the research suggest that, in spite of the low economic value of income generated by individual recreation businesses, the effects of not obtaining that income could impact adversely on the rural landscape and thus, in a cyclic manner, on the rural economy. That the landscape within the case study regions, as elsewhere within the UK, is an important visitor attractant is identified

within the research findings, as detailed within Chapter Four. With landowners and farmers being critical to the maintenance of that landscape, and with visitors in many instances being critical to the maintenance of farms, the link between visitors and landscape maintenance is identified and strengthened. Within this and in consideration of a more holistic landscape and water management approach with respect to environmental improvements, as introduced within the literature review, wetlands and wildlife attractions have the potential to play an important role in attracting visitors and contributing to rural economies. Such factors impinge on wider policy issues associated with agriculture, water management and tourism, in association with the maintenance of rural communities, and are discussed in greater detail within the following chapter, (Chapter Six).



Photograph 10: Swan feeding at WWT Welney, The Fens.

Chapter Six: Discussion.

6.0.1. Introduction.

The research identifies both a visitor demand for wildlife and associated attractions within the case study regions, and that even the low levels of related income are important with respect to the maintenance of the landscape. There is therefore a *raison d'être* for encouraging the development of a visitor market. Further to such benefits are the positive impacts in local communities as a result of the economic distribution and circulation of visitor spend in the local economy. These include an increased demand on services from visitors and visitor attraction employees, improved prospects for the maintenance of community services, and further employment and income generation. Thus, encouraging a visitor market has potential to encourage economic and community viability within regions of limited economic strength and diversity.

Factors such as the type and scale of potential visitor market to be developed require consideration, as do the potential impacts on the greater agricultural economy of the case study region. The influence of policy on the associated rural economy has an important role to play. Involving landowners as land managers, and local communities as suppliers of services, will be central to any visitor market success. This chapter addresses these issues in detail, and discusses the potential for establishing a nature-based visitor market within the primary, case study region of the Humberhead Levels.

6.0.2. Economic recovery and regeneration through tourism development: a 'traditional' perspective.

As discussed in the literature review (Chapter Two), tourism development is often noted as a partial solution to both rural and urban economic decline (Sharpley and Sharpley, 1997; Fleischer and Felsenstien, 2000; Law, 2002; Sharpley, 2002a; Hall and Boyd, 2005). This has some justification. Tourism development may offer alternatives to declining economic sectors through increasing income and employment potential, and encouraging diversification of employee skills. The view often presented is that to be successful, and to halt economic decline, tourism and visitor-related development is best

when developed on a large-scale (Law, 2002). Such a large-scale development approach requires high investment and has significant development costs. It also requires high visitor numbers to ensure an appropriate return on investment with associated economic benefits. In such proposals, a "*flagship*" development or "*prestige project*" (Loftman and Nevin, 1996. p. 992; Law, 2002) is often presented as the means with which to 'kick-start' tourism-based regeneration projects. Visitor income will be generated and the region become more widely known as a new or reinvented destination, tourism or otherwise. Such was an initial consideration and option in respect of the current research: a flagship, wetland based attraction could be the catalyst which establishes the Humberhead Levels as a tourism and visitor destination. Similar observations are not uncommon within rural communities, with resort development being seen as the key to rural tourism success (Lane, 1994).

UK tourism-based regeneration developments range from the regeneration of traditional coastal holiday resorts, to urban regeneration based around former industrial areas and retail opportunities (Duding and Ryan, 2000; Law, 2002). Examples also include the development of new attractions such as Cornwall's Eden Centre, albeit in a disused quarry. In such developments, the emphasis has been on mass or intensive tourism. In addition to this, whilst the importance of day-trips are noted (Law, 2002), much tourism development and research has been based around the higher income generating, overnight staying tourist (Flognfeldt, 1999). Day-visitors contribute important visitor spend, but to ensure a high income and a successful visitor destination development, accommodation is considered a prerequisite. Whilst rural tourism, as a sub-set of tourism, is noted as a potential, small-scale development option for rural areas (Fleischer and Felsenstien, 2000), there has been a concentration on attracting overnight-staying visitors and the development of tourism systems (Mill and Morrison, 2002). This is designed to maximise visitor income potential based around large-scale, accommodation-related, intensive tourism. Indeed, the various definitions of 'tourist' noted in section 2.2.0. suggest that unless a visitor meets required criteria, they are not considered as tourists, and by association, therefore, their economic impacts are given less consideration. Thus within literature and policy, an emphasis is often placed on one type of visitor, the overnight staying tourist, at the expense of another, the humble day-tripper.

The logic of concentrating on overnight staying visitors is simple. Not only do such visitors spend during the day, their accommodation spend is in addition to this, as is likely the cost of an evening meal. Thus, per visitor, spend is likely to be higher for overnight staying visitors than day-visitors, as noted by this research, sections 4.4.8., 4.4.11., and Graph 41. As Alexander and McKenna (1998) detail, at 10% of all visitors, overnight staying visitors contributed 55% of visitor expenditure within the Heart of England region, with 33% originating from overnight UK tourists, and 22% from overseas tourists. The remaining 90% of visitors, and thus 45% of visitor spend, comprised of day-visitors. Thus, if economic development is the required aim, why attract those day-visitors who spend less? However, the importance of day-trip visitors is also noted (Sharpley and Sharpley, 1997; Alexander and McKenna, 1998; Downward and Lumsdon, 2000; National Trust, 2001; Anon., 2004; Bryan *et al.*, 2004: GBA, 2005). The visitor numbers referred to are generally high, discussed on a regional or national basis, and suggest a context of intensive tourism. Thus the economic value of such visitors is placed within a tourism context.

Consequently, the scale of tourism development has often been large. The development of accommodation-based tourist resorts, package holidays and the mass transportation of tourists around the globe testifies to the monetary flow associated with tourists' desires for new experiences. The 'rash assault' of the tourist noted by Wordsworth with respect to the Lake District is now affecting much of the globe (Sharpley and Sharpley, 1997).

6.0.3. Examples of the negative aspects of 'traditional', intensive tourism development.

As noted within the literature review (Chapter Two), tourism development is not without its inherent difficulties or detracting factors. Lane (1994) notes that such difficulties can occur on a social and environmental level. The downside of large numbers of carefree tourists and visitors in terms of litter, noise and sometimes anti-social behaviour is evident in news stories and television documentaries. The sometimes antagonistic, unwelcoming behaviour of local populations to an excess of visitors can also be of concern (Cooper *et al.*, 1998; Hall and Page, 2002; Ryan, 2003). On a more socio-economic level, whilst tourism can increase opportunities for employment and income generation, tourism can also create extra demand for scarce resources, including

employment, leading to the displacement of such opportunities by subsuming existing industries and their dependant factors (McKercher, 1993; Andrew, 1997; Mazzanti, 2002). Furthermore, Law (2002) refers to studies highlighting the poaching of labour from existing industries to new industries such as tourism. Thus, whilst economic impacts are not questioned, rather than generating an additional source of income and employment, large-scale tourism could become the only source of income and employment, creating a tourism 'mono-culture'. Added to this is the often referred to low wages and seasonality of tourism-related employment and income/profit, and the oft inflated employment potential of tourism (Leiper, 1999; Fleischer and Felsenstien, 2000; Wilson *et al.*, 2001). Noted as a fickle and changing industry (Wanhill and Buhalis, 1999), an over-reliance on tourism, therefore, could have considerable negative economic and social impacts. This might be to the extent of creating economic instability within a region, and deterring non-tourism related industries (Archer, 1973, in Andrew, 1997; Saeter, 1998). Secondary industries useful as alternative economic generators may be discouraged.

With the above noted, the practical and on-going financial aspects of tourism development require consideration. Often presented as a method of development and regeneration (Sharpley, 2000), there is a requirement for tourism development to generate income, not only to become self-sustaining and thus less reliant on public funds, but also in respect of return on investment associated with tourism development funded by private sector investment and consequential shareholder demands (Law, 2002). As such, tourism development is little different from other forms of development: the greater that development, the greater the investment costs and infrastructure required, and the greater the financial risk should development fail. With respect to the development of high profile, flagship tourism attractions as methods of regeneration and their on-going viability, attractions such as the Eden Centre have proved successful, with associated benefits for the local economy (Jasper, 2002). Other flagship attractions have proved less successful, as identified within the literature review (section 2.1.4). In particular, Sheffield's National Centre for Popular Music closed within two years of opening after a forecast 400,000 visitors per year actually resulted in 130,000 visitors per year. This meant a consequent loss of visitor income and financial shortfall (Law, 2002). The Earth Centre near Doncaster closed in September, 2004, having failed to meet visitor and financial targets since opening in 1999. The National Botanic Garden of Wales, having suffered financial difficulties and threats of

closure, required a financial rescue package in 2004, four years after opening (BBC, 2004a and 2004b). Similarly, within months of opening in 1996, over-estimated visitor numbers followed by insufficient visitor numbers led the Leeds-based Royal Armouries to financial insolvency and a consequential rescue package, with comparisons being made to visitor numbers and financial difficulties surrounding the London Dome (DCMS, 2001; BBC, 2001). Presented as developments to aid regeneration of declining areas, such examples illustrate the pitfalls of flagship attractions and unrealistic visitor forecasts. With constraints and demands on funding, the maintenance of such a 'lame duck' attraction could present a considerable drain on Local Authority or Government Agency finances, as observed by Fredrick (1993, in Fleischer and Felsenstien, 2000) with respect to tourism generally and its demands on local services.

Tourism development on a large-scale may also impact on the local environmental resource. Whilst aesthetic impacts can be subjective, development regulations could mitigate many adverse impacts associated with inappropriate development. However, issues such as pollution, excess traffic and visitor numbers can all impact on visitor enjoyment and the environmental resource (Herath, 2002), thus potentially lessening visitor demand. The greater the development scale, the greater the propensity for adverse environmental impacts. Thus considerations for the level of tourism development against adverse environmental and social impacts should be considered. Whilst such factors are taken into account in policy implementation, a visit to many of the favourite UK tourism destinations will illustrate the difficulty in controlling adverse factors such as traffic in a retrospective manner.

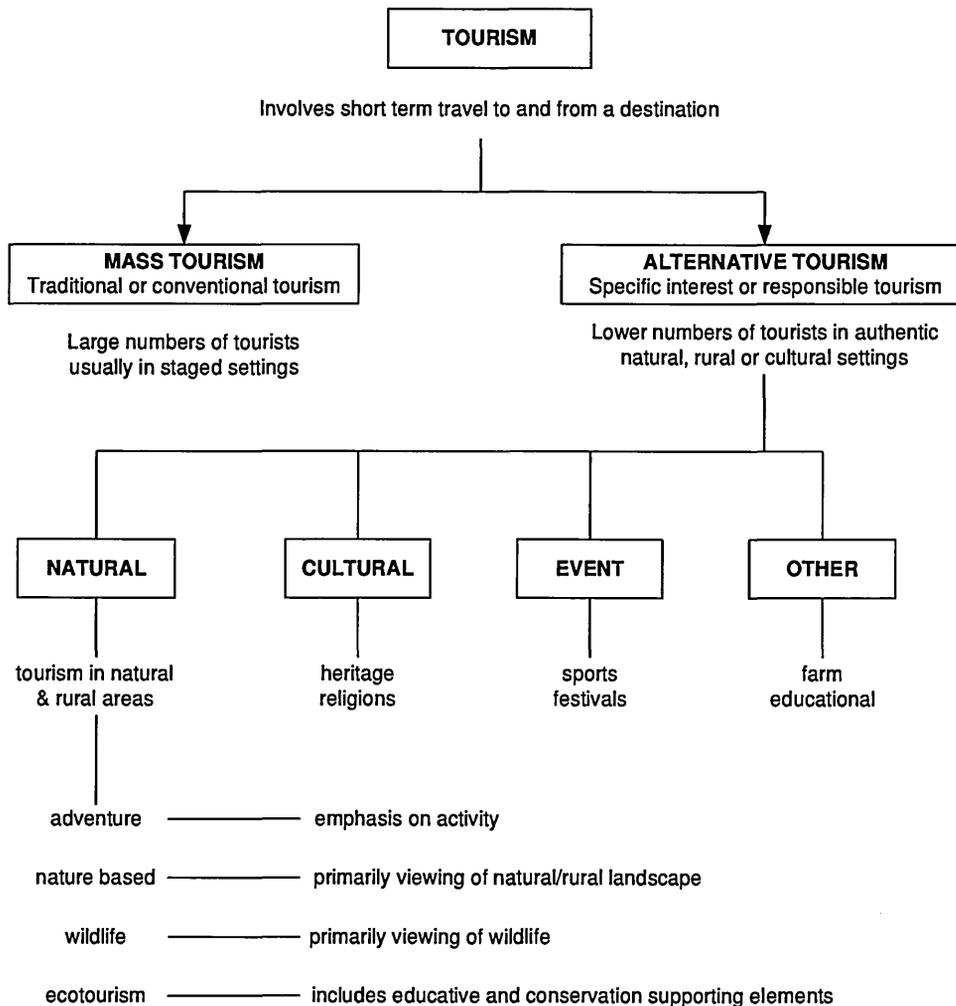
6.0.4. An alternative, low-key perspective on tourism development.

Introduced and considered as an aspect of sustainable tourism within the literature review (Chapter Two), and as an alternative to mass or intensive tourism, the concept of "*alternative tourism*" (Newsome *et al.*, 2002, p.10) offers the potential for small-scale, locally operated tourism facilities. The benefits accrue to local businesses and communities rather than remote, multi-national organisations (Wilson *et al.*, 2001; Cater, 1994 in Newsome *et al.*, 2002). In this manner, alternative tourism potentially offers a low-cost form of tourism development within regions of as yet limited visitor demand, and thus limited development risk.

Tourism development of any scale, however, has the potential to impact on local economies and environments both positively and negatively. Whilst alternative tourism as a development option is suited to regions of low visitor demand, limitations of infrastructure and potential investment opportunities will limit development potential overall, and thus the scale of tourism development. From the visitor demand perspective, the ease with which a destination can be reached and the availability of visitor facilities will have considerable bearing on decisions to visit. The more difficult a destination is to reach and the lower the visitor facility level, the lower visitor demand is likely to be, and the more attractive, alternate, better equipped destinations may become, although the decision to visit will also depend on the nature of the visitor and the requirements of the visit (Ryan, 2003). Such latter factors are illustrated further within the visitor classifications undertaken by Cohen and Plog (1974 and 1977, in Ryan, 2003), and further discussed below (section 6.0.12.). Such is the recent growth in visitor activities and pursuits available to the visitor market, however, that in conjunction with higher disposable incomes and increases in leisure time, there is increased demand for alternative forms of tourism and visitor experience. In particular, increased urbanisation of modern societies has generated an increase in demand for rural tourism and the activities available within a rural context (Sharpley and Sharpley, 1997). For such markets, difficulties of destination access and facilities can be less of an issue. Newsome *et al.* (2002) suggest this increase in holiday and leisure-time activities coincidentally developed alongside an increased environmental awareness, and in particular with holidays associated with the environment as an alternative to "*mass tourism*" (Newsome *et al.*, 2002. p.10). Sharpley and Sharpley (1997) observe similarly with respect to mass consumerism in the 1960's and 1970's, and thus a demand for alternative, environmentally aware holiday and leisure activities has developed.

Within the context of alternative tourism as identified by Newsome *et al.*, (2002), tourism based on the natural environment is included. Within a UK context and the lack of natural landscapes, such natural area-based tourism would include rural tourism, and include activities undertaken within the rural landscape, such as walking, cycling, fishing, equestrian activities and wildlife watching. Where facilities allow, activities such as boating would also be included. Figure 10 provides an overview of mass and alternative tourism. However, it should be noted that many activities can encompass more than one aspect of alternative tourism as detailed in Figure 10. A fishing match may take place on a natural waterway, but a match itself is more of an event, whilst

horse riding may make use of the natural landscape, but be based within a farm. Such transferability can also be noted between mass and alternative tourism. Thus such descriptors are flexible in their application, and for the purposes of this research, should be considered a guide rather than absolute.



Adapted from Newsome *et al.*, 2002.

Figure 10: Tourism overview.

In respect of rural tourism as an aspect of alternative tourism, such developments frequently comprise of small-scale, family orientated business (Fleischer and Felenstein, 2000; Rilla, 2004), with the potential to diversify and offer secondary income sources. This is also the case for businesses involved within the nature-based recreation and tourism market. Such small businesses have a "*catalytic potential*" (Lordkipanidze *et al.*, 2005. p.791) in encouraging the use of local resources as components of local tourism markets. Further benefits noted include a reduction in out-migration (Walford, 2001) through increased employment potential, and an upgrading of infrastructure

through tourism demand. Opportunities can also be created through in-migration of urban dwellers and the mix of urban-rural cultures and demands (Oppermann, 1996; Fleischer and Felenstein, 2000). In a similar manner to the independent 'natural' and 'other' categories of alternative tourism illustrated by Newsome *et al.* (2002), Oppermann (1996) distinguishes between tourism in rural areas and farm tourism, whilst Roberts (2002) provides various opinions on whether or not rural and farm tourism are separate entities. Such considerations are noted by Selby District Council in observing the links between traditional rural leisure activities and pursuits, and tourism, in highlighting the popularity of fishing and equestrian holidays as non-farm tourism activities (SDC, 2004). Within this discussion, the importance of active or passive visitor involvement in the agrarian environment is considered, i.e. working-farm holidays, or passively enjoying the products of landscape management through farming. However, with respect to the attraction of income and employment to rural areas via tourism and visitor spend, such observations, although informative in respect of individual tourism segments and their marketing, are of less importance to this current research. Whilst the importance of visitor income to farmers has been identified (sections 5.2.0 and 5.3.0.), this is in respect to the maintenance of the wider rural landscape through farm viability and the effects on rural tourism as a whole. It is the heterogeneous nature of rural tourism (Lane, 1994) that is of importance, and the therefore associated potential to attract visitors as economic benefactors to rural areas.

An aspect of alternative tourism not detailed within Figure 10 is one less concerned with tourism as a concept, and more concerned with attracting visitors and their income *per se*, i.e. recreation and leisure associated with day visits. Considerations of recreation and leisure activities associated with day-visitors, in conjunction with overnight staying visitors, form an important component of alternative tourism as income generators. This illustrates the need to consider visitors outside tourism definitions as detailed in section 2.2.0. Figure 11 illustrates a modified version of Figure 10 to account for recreation and leisure activities associated with "*non-visitor(s) or non-important tourists*" (Flogfeldt, 1999, p.359), i.e. day, recreation and leisure visitors.

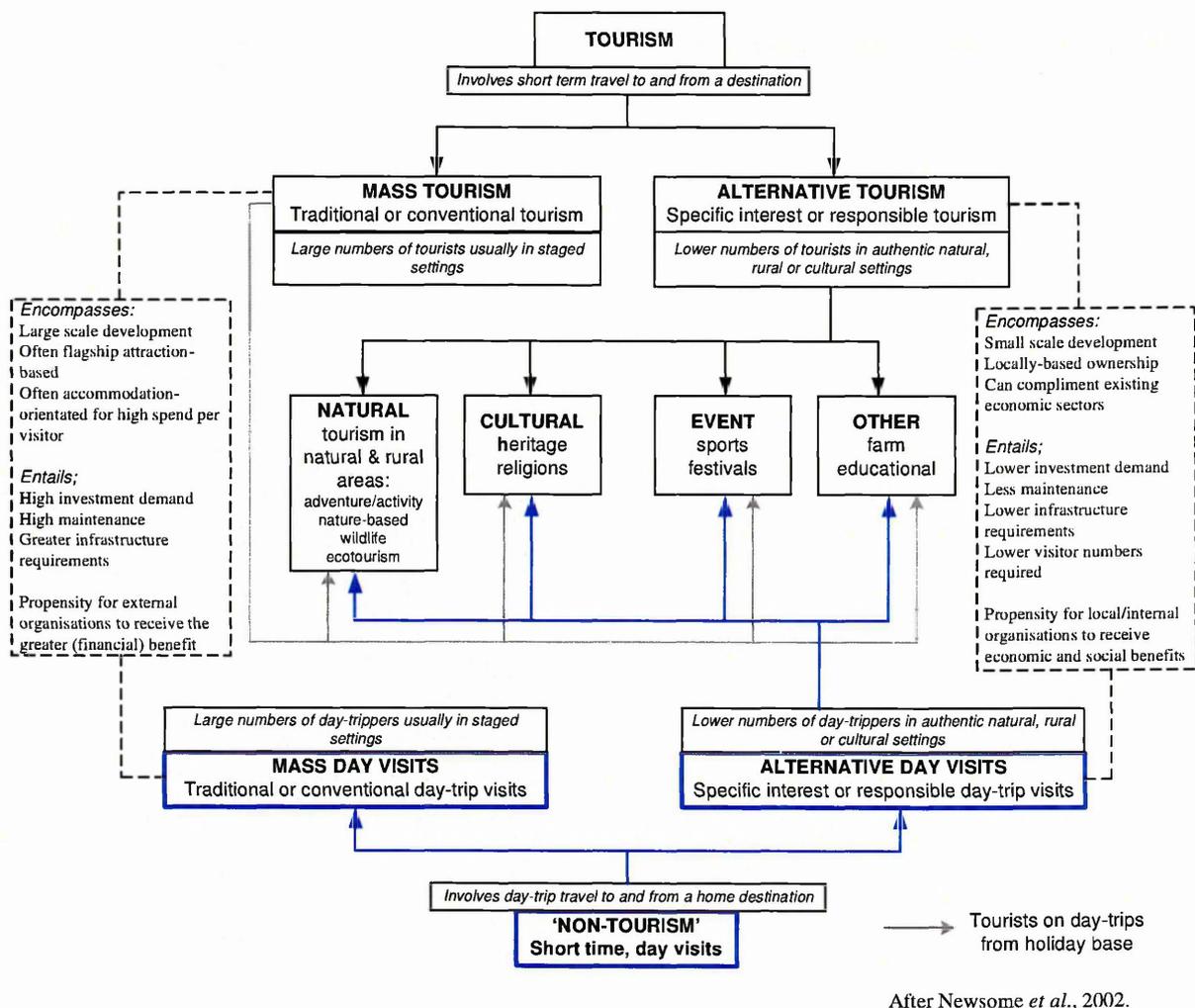


Figure 11: Overview of tourism and 'non-tourism' recreational day visits.

6.0.5. The limitations and potential negative implications of alternative tourism and day-trips.

The lower intensity of alternative tourism and day-trips does not negate all potential adverse impacts. Whilst small numbers of visitors are less likely to alienate or antagonise local populations in the manner that high numbers of visitors can (Butler, 1980; Ryan, 2003), or place excessive demand on resources, equally, low numbers of visitors may not create a worthwhile economic benefit, as demand for visitor facilities and visitor spend will be low. Already noted as often small-scale businesses, small visitor facilities may be marginal in benefiting local economies. Extra, new facilities may also simply serve to diffuse and displace existing, low-key demand. Whilst visitor businesses may capitalize on underused resources such as buildings and employees, and therefore offer a potentially greater return on existing investment, supporting such

businesses and visitor development may prove to be ineffectual and a drain on scarce resources (Fleischer and Felenstein, 2000).

As with any tourism development and noted within the literature review (Chapter Two), issues of low wages, casual and seasonal employment can be considered a problem. In conjunction with low visitor demand, employment demand will also be limited, and thus of little benefit within regions of employment shortages, although in regions of sparse population and full employment this may not be an issue. Thus the related benefits of alternative, specialist visitor facilities and attractions will be lessened. Whilst a low tourism and visitor demand is less likely to subsume existing employment opportunities and industries, and indeed local cultures, in the manner of intensive tourism (Ryan, 2003), nonetheless, such factors require consideration in development policy, as would the potential for visitors to despoil the environmental resource, upon which alternative tourism and visitor facilities can depend.

As a contrast to the alienation and antagonism of local populations caused by increasing visitor numbers through intensive tourism (Butler, 1980), indifference, apathy and potential hostility by local populations within regions not considered visitor destinations could limit visitor development. As such, observations regarding local hostility to visitors were noted during recreation business data collection within the Humberhead Levels. Without a positive understanding of the potential benefits of visitors, even on a limited scale, local apathy could stifle visitor development. Furthermore, with respect to both intensive and alternative tourism/visitor development, an influx of visitors could prove unsettling for locals, with issues of theft, property damage and conflict linked to increased visitor numbers (Hall and Page, 2002). Thus local support for tourism and visitor initiatives is paramount (Wilson *et al.*, 2001), and whilst not without difficulties, rural tourism as integral to alternative tourism and visitor development "*remains one of the few viable economic options for rural communities*" (Fesenmaier *et al.*, 1995, in Wilson *et al.*, 2001, p.132).

6.0.6. Identified visitor types and associated spend.

In concordance with the potential for alternative and 'non-tourism' visitor attraction types detailed in Figure 10 and Figure 11 is the predominant visitor type identified

within the case study regions, principally day-trip visitors. Clearly not considered 'tourists' by definitions detailed in section 2.2.0., nonetheless, day-trip visitors identified during the research present the largest proportion of visitors overall at a ratio of 3:1, (section 4.1.6. and Graph 8). As also noted, similar and greater proportions are identified within often practitioner literature (Mills *et al.*, 2000; Continuum, 2004; Rotherham *et al.*, 2005b; GBA, 2005). Conversely, this current research identified the spend of overnight staying visitors as being around three times that of day-trip visitors, at £23.53 and £7.39 respectively (Table 68 and Table 73). Thus the spend of one overnight staying visitor theoretically equates to the approximate spend of three day-trip visitors. The proportionate spend of the two visitor types is therefore approximately equal. Numerous texts also confer the importance of overnight staying visitors as those of greater spend per visitor (Alexander and McKenna, 1998; Bryan *et al.*, 2004). Thus it would seem that overnight staying visitors present the greatest opportunity for income generation. However, with day-trip and transient visitors often being left out of tourism research, the importance of day-trip visitors within the wider context of tourism research is therefore not necessarily fully realised (Flogenfeldt, 1999; Downward and Lumsdon, 2000). When considering the numbers of day-trip visitors, the overall importance of day-trip visitors as generators of income becomes apparent, with their importance being increasingly noted within literature (Downward and Lumsdon, 2000; National Trust, 2001; Law, 2002; Bryan *et al.*, 2004; Anon., 2004; Continuum, 2004; GBA, 2005), and often far exceeding that of overnight staying visitors. Further to this, with respect to the case study region of the Humberhead Levels, little accommodation exists (Rotherham *et al.*, 2002b), with the data showing a propensity for visitors to use low cost accommodation, i.e. camping, within the area (Graph 12). Thus economic input from overnight staying visitors within the Humberhead Levels is and will be limited. In this respect, day-trip visitors represent the most viable target audience in the first instance, as also noted by Steadman (2003).

Day-visitors thus present differing marketing opportunities and create different demands on visitor facilities. In order to obtain economic benefits from day visits, it is paramount that such visitors have opportunities to spend during their visit. In this respect, the research has demonstrated that day-trip visitors are less concerned with a variety of attractions within their destination region (Graph 19). Instead, visited attractions tend to be the primary reason for their visit (section 4.1.11.), as similarly noted by Flogenfeldt, (1999). Consequently, to encourage visitor spend, such attractions require opportunities

to spend, as illustrated by Graph 25. Greater daily spend occurred at those attractions with greater opportunities to spend.

The targeted approach of day-trip visitors does not suggest a mix of visitor facilities within a region is unnecessary, as evidenced by the details of other nearby attractions previously visited provided by visitors. A mix of attractions is clearly important in attracting a varied cross-section of the visiting public, and in encouraging repeat visits. An attraction mix is also considered important by recreation businesses as a means to advertise their businesses and the wider area (section 5.1.8.). Further to this, and in consideration of the distances travelled by day-trip visitors (section 4.3.6. and Graph 38), limited facilities at a visited attraction could precipitate stops at local food and drink providers to obtain sustenance before travelling home. Likewise souvenirs and retail opportunities. Over-night staying visitors, by comparison and in consideration of those staying in self-catering accommodation and camping, may purchase supplies outside of the local area in preparation for their visits, thus lessening benefits to local economies. Further to this, food supplied in all inclusive accommodation may not be purchased locally, although this can be countered by overnight staying visitors visiting local pubs and restaurants rather than cooking in self-catering accommodation. With such matters considered, day-trip visitors can be an asset as valuable as overnight staying visitors, particularly for attractions and facilities offering catering and retail opportunities (Flogenfeldt, 1999), and for regions with limited accommodation stock, such as the Humberhead Levels.

6.0.7. The economic impacts of visitor income on land managers.

With respect to visitor income, the research has identified the importance of visitor income to primary visitor income receivers, i.e. businesses in direct contact with visitors, regardless of further recycling of that income within local economies. As numerous economic texts testify (Yu and Turco, 2000; Hudson, 2001) the longer money circulates in an economy, the greater benefit for that economy. Such benefits are lessened considerably should visitor spend 'leak' rapidly from the local economy. Critical as such matters are to overall local economies, of note for this research is the importance placed on visitor income by businesses that undertake visitor recreation as a secondary form of income, these being principally landowners and farmers.

Regarded as low, almost to the point of insignificance by some authors (McNally, 2001; Roberts, 2002; CRR, 2003; DEFRA, 2004), the income provided to landowners through diversified and secondary recreation-based businesses has been shown by this research to be vital to the viability of many farm enterprises (sections 5.1.3. and 5.2.2.), with pertinent, supporting comments detailed in Table 82 and Table 84. Literature also confirms such observations, even those noting the insignificance of visitor-related income (Busby and Rendle, 2000; Nilsson, 2002; CRR, 2003), with Meert *et al.* (2005) commenting upon survival strategies adopted by farms struggling to make sufficient agricultural income. Although the actual, imputed costs and associated profits attributable to such recreation income can be debated (Carter, 1999; CRR, 2003), i.e. the inclusion or exclusion of existing capital and labour from financial accounts, inclusion of such factors as costs ignores the benefits of marginal profits accrued through capitalising on existing, under-utilised resources. Whilst developing an existing resource to a condition fit for visitors will entail expenditure, e.g. a redundant farm building converted for accommodation, such opportunity costs will be comparatively low compared to purchasing a building for the same purpose. Maximising the use of under-utilised, fixed assets is noted by McInerney and Turner (1991, in McNally, 2001) as an important factor in undertaking diversification enterprises. Thus under-utilised assets present an opportunity to increase marginal profits for limited capital outlay, and generate much needed income from a potential financial liability and opportunity forgone. Whilst each landowner will have their own ideas and assets on which to capitalise, with accommodation being typical (Fleischer and Felenstein, 2000), such assets could include land developed for wildlife, wetlands and nature walks, fishing ponds, equestrian activities, or the development of miniature railways through woodland, all attractions identified during this current research.

Although recreation-sourced turnover for the targeted, multiple business, farm-based enterprises is unknown, the overall turnover for such businesses is known (sections 5.1.2. and 5.3.1.). With low levels of overall turnover identified, recreation-based turnover and therefore financial return will be small, as confirmed within the literature (Roberts, 2002; DEFRA, 2004 & 2005a). However, as noted from observations made during data collection (Table 96), and supported within the literature (Busby and Rendle, 2000; Nilsson, 2002), it is clear that visitor-related income is an important contribution to farm incomes and the survival of many farms. Figure 12 hypothetically illustrates how visitor derived income could raise overall income levels for such

enterprises, and thus increase overall farm viability. Further to this, as well as providing an income during annual, fallow periods of the farm production cycle, as identified within the current research, visitor income can offer an element of income security through increasing the diversity of farm income sources overall. Equally, visitor spend can provide vital income during annual periods of limited agricultural income, e.g. prior to crops being harvested, as indicated during data collection for this research. Although there can be no guarantee that a visitor enterprise entered into will generate sufficient income to maintain agricultural operations, or be self-supporting as an independent, primary business, nonetheless, an alternative income source could offset declines in agricultural income, and maintain farm viability.

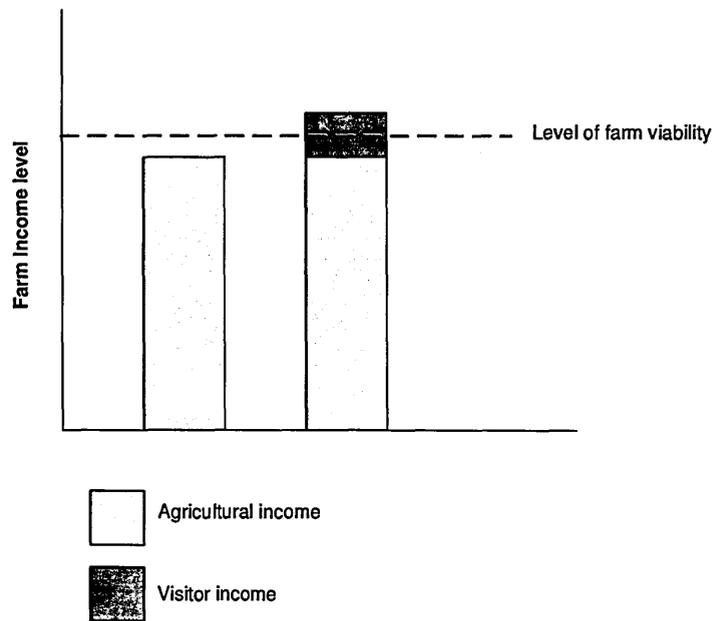


Figure 12: Hypothetical illustration of agricultural income levels supported by visitor income.

Whilst Figure 12 details a hypothetical illustration, factors of output, i.e. income received, and diminishing economic returns require consideration. Thus, utilising redundant assets as visitor facilities will maximise capital investment, but may also require increased investment in the form of labour. In many instances, it is often women, i.e. the farmer's wife, who operate visitor facilities on farm-based enterprises (Fleischer and Felenstein, 2000; Nilsson, 2002). Thus such labour could be considered existing 'capital'. However, if existing labour as capital is already used to its fullest extent, then further, externally-sourced labour is required. This will increase employment opportunities, and has been identified during the research as a means by which family members can maintain employment on the family farm. Employment of

non-family members represents an increased, external cost, and potential diminishing returns on investment. In simple economic terms, excluding long-term investment values, if the costs of an extra employee exceeds the income generated by a visitor facility, then the overall farm income could be less than that produced by agriculture alone. In such an instance, marginal profits afforded to recreation income could be less than zero, a situation noted by DEFRA (2004), and therefore a drain on farm resources. Although visitor-based income is noted to exceed agricultural income in some instances (Busby and Rendle, 2000; Nilsson, 2002), and has been shown to provide important extra income by this research, careful consideration of all issues is required.

6.0.8. Implications for policy input in visitor destination development.

With an understanding of the prevalent visitor type within the case study regions (identified and discussed in Chapter Four), and the potential for alternative forms of tourism and day-trip recreation opportunities identified in Figure 11, opportunities for policy input regarding the development of visitor attractions require consideration. With recent policy often advocating the development of large, flagship attractions, and with the potential inherent problems identified in section 6.0.3., above, Figure 13 illustrates potential leakages of economic benefits resulting from large-scale, remotely financed and operated attractions. Whilst a hypothetical illustration, the leakage of income from local economies to remote business headquarters by external organisations or to service loans is well understood, and illustrates inevitable links to the wider, national economy (Crompton, 1995; Holloway, 1998). Such situations entailing excessive economic leakage limit local benefits and therefore local economic regeneration potential. Further to this, attractions of a large, flagship-type can remove much of the control of development from local people and communities, thus 'leap-frogging' the stage of discovery and local control identified within Butler's (1980) tourist area cycle, discussed further in section 6.0.12.

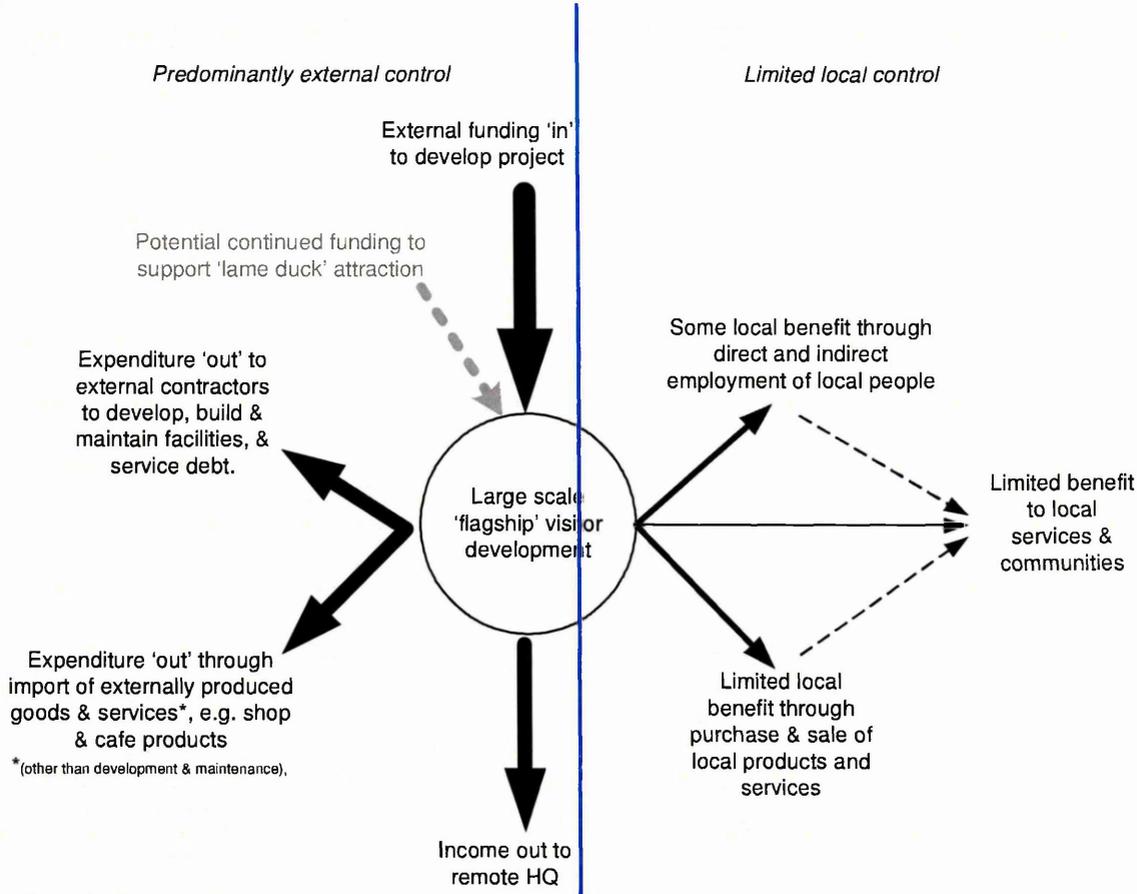


Figure 13: Illustration of potential economic leakages from single, flagship attraction development.

As an alternative approach, the encouragement and development of locally owned and operated visitor facilities has greater propensity to reduce economic leakages, therefore benefiting local economies (Holloway, 1998). With many rural visitor facilities being family operated (Fleischer and Felenstein, 2000), policy support to such enterprises is likely to increase local economic benefit retention, and retain local control of development (Figure 14). The model presented in Figure 14 better represents the development of a visitor market within the Humberhead Levels. The research identified potential for small, locally-operated visitor attractions in the case study regions, and local economic benefits. The model (Figure 14) presents the retention of visitor spend and local control as critical elements within local economic gain and community viability. Comparison with the model presented in Figure 13 shows less local control over visitor development, and highlights the greater economic demand associated with a large, externally-funded, flagship visitor attraction. The consequent export of funds from any visitor spend, and the relatively inconsequential benefits to local economies and communities for the greater initial investment required, are also presented. The

establishment of a flagship attraction in a region as unknown to potential visitors as the Humberhead Levels increases the financial risk and exposure. This potentially places an increased demand on limited public resources should visitor numbers be insufficient to recoup development costs. As such, Figure 14 represents a more conservative development option.

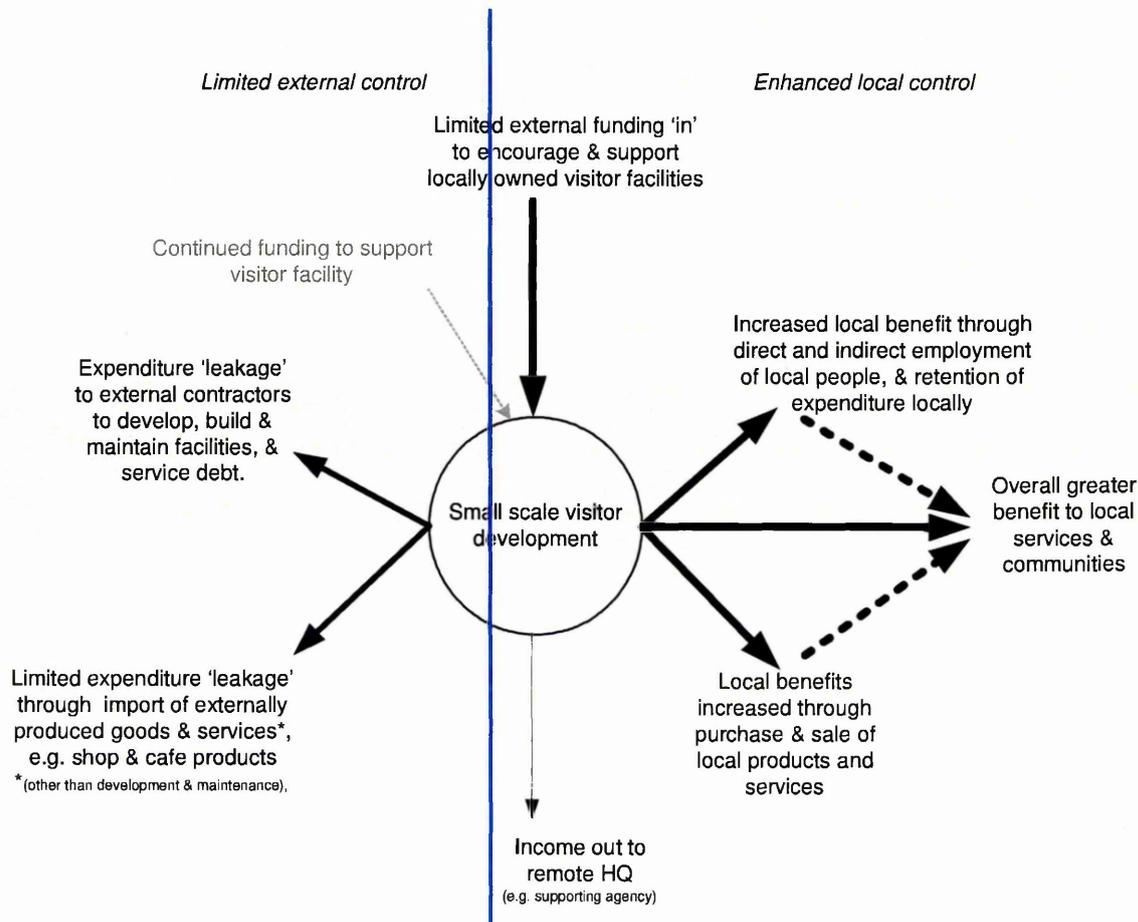


Figure 14: Illustration of economic benefits from small-scale, locally owned visitor facilities.

Further consideration with respect to the development of a publicly-funded visitor attraction or centre is the potential for the attraction to act as a 'growth pole' (Andrew, 1997, p.721). It may encourage the generation of a cluster of visitor attractions and facilities, enhancing positive benefits for the local economy. Figure 15 illustrates potential links between local attractions and associated businesses. Whilst economic leaks are not eliminated, the generation of a cluster of locally-owned visitor attractions and support businesses, has greater potential to retain more economic benefits within the local economy. This also provides an increased variety of attractions, and thus a greater visitor draw.

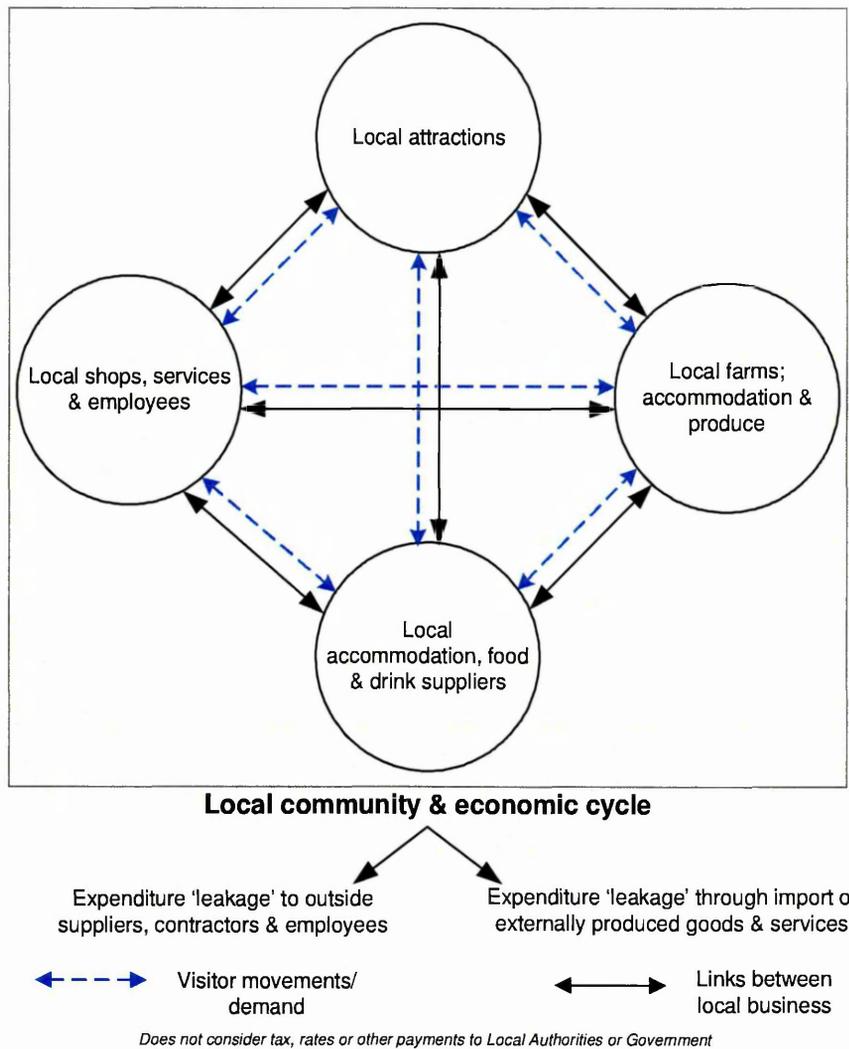


Figure 15: Illustration of links between small-scale, locally owned recreation and support businesses.

6.0.8.1. The concept of clusters as a benefit for visitor destination development.

Referred to in the preceding section and introduced within the literature review (Chapter Two), the notion of business clusters as a network of stakeholders within a sector is a comparatively recent concept (Carrie, 2000). Defined by Porter (1998, p.213) as

"a system of interconnected firms and institutions whose value as a whole is greater than the sum of its parts",

clusters allow stakeholders within associated business to operate in conditions of rivalry and mutual benefit. Such benefits combine to strengthen a sector's economic viability,

as opposed to a divide and conquer approach often associated with cost undercutting and imitation, (Jackson, 2005). Although clusters often occur within a limited geographical area, equally, clusters can be national and trans-national in concept (Porter, 1998). Applicable to tourism and recreation along with manufacturing industries, the concept of clusters suggest benefits in the pool of resources associated with a particular economic demand, and links between resources of differing economic demands. Rather than being confined exclusively to one sector or another, the benefits of clusters invariably cross economic boundaries through individual businesses serving more than one cluster. It may introduce concepts, ideas and products from one sector to another (Porter, 1998; Carrie, 2000). As an example of links between clusters, Porter (1998), refers to the Californian wine industry cluster and the links between the local agricultural, food and tourism clusters.

As well as demands for improved transport and infrastructure links associated with successful business sectors, the demands of clusters also has the ability to encourage skill development related to cluster demand (Ceccato and Persson, 2002). Similarly to urban concentrations of businesses (Goodall, 1972; Law, 2002), product specialisation within mixed sectors, typified by variety in associated businesses within clusters, provides employees with employment alternatives and allows them greater opportunity to apply their skills in the most appropriate employment. That is, the range of demands within a cluster provides increased scope for employment and skills of varying types. This contrasts with the demands of a single industry such as agriculture. Such opportunities therefore have potential to lessen out-migration of those unable to find suitable employment within their home region by increasing employment variety. This in turn maintains and increases demand for community services, including shops, pubs and schools. Furthermore, increased skill variety and demand requires increased qualification levels and educational facilities (Ceccato and Persson, 2002), thus cluster demands increase competitiveness overall through raising the expectations of individual businesses. Collectively, such expectations and demands have the potential to increase the self-sustaining development ability of regions (Ross, 2000). This is through increased competitiveness within the larger, national market place. With respect to this study, such a market place includes nature-based recreation and leisure.

Within the predominantly agricultural economy of the Humberhead Levels and the development of a nature-based recreation and leisure market, clusters have the potential

to encourage the establishment of links between supporting sectors. These would include farm-based visitor attractions, local produce suppliers, and visitor attractions reliant on an attractive environment and wildlife resource. Alongside income benefits, employment, and local economic viability, the development of a nature-based recreation and leisure business cluster has the potential to present the Humberhead Levels as a coherent, unified visitor destination to the public. As Porter (1998) suggests with respect to the benefits of clusters, such a visitor destination and the ensuing benefits are potentially greater than the sum of the parts. In this manner, a unified, cluster-orientated visitor destination is better able to maximise income potential whilst offering protection to the common resource that is central to visitor demand. In the case of the Humberhead Levels, this is the environmental and wildlife resource within the agricultural landscape.

6.0.8.1i. Cluster development and the protection of the common, nature-based resource.

Including situations such as nature-based recreation or tourism, clusters enable the "*sources of uniqueness*" (Porter, 1998, p.247) to be better utilised, and can act as a collective "*magnet*" (Law, 2002, p. 59) with respect to attracting visitors. As nature-based recreation relies on the landscape and wildlife as the predominant resource, the mutual benefits afforded from this resource to recreation business in their pursuit of customers (visitors), can encourage a better protection of the nature-based resource. Businesses in and associated with nature-based recreation have a vested interest in maintaining the landscape in a manner that encourages visitors (Huybers and Bennett, 2003). Whilst conceptually simple, the vagaries within the recreation and tourism sector present difficulties in applying the concept of protecting a shared environmental resource. Free-riders (Leiper, 2004) and the individualistic tendencies of independent businesses present difficulties to be overcome. Nonetheless, an awareness of the benefits shared by businesses reliant on the natural environment, and their mutual interdependency (for all businesses within the nature-based recreation and tourism cluster), has potential to engender a self-regulating, protective element to recreation and tourism development. This can be supported by policy where appropriate.

6.0.8.1ii. Policy input and cluster development.

As a cluster dependant on visitors, nature-based recreation has the potential to encourage support services and new, associated clusters based around these support services, which may not be visitor-related. The improvement of transport and communications links to facilitate visitor demands will also benefit existing businesses outside tourism, through reducing isolation and presenting opportunities for increased business development and output (Jackson, 2005). Appropriate policy has the potential to not only encourage economic growth within the nature-based recreation sector, but also in sectors outside nature-based recreation. As such, policy, i.e. governmental and agency policy development and implementation, is integral to cluster development, either as an instigator in developing an area, and or as an operator of visitor attractions (Law, 2002). Cluster and visitor attraction development may originally be supported by state aid, with policy encouragement and an increasingly available pool of resources. However, increasing economic strength has potential to lead to a network of self-supporting, locally owned businesses independent of state aid (Murdoch, 2000; Jackson, 2005). The proximity of attractions to each other and associated support businesses makes a location more attractive to visitors and businesses, attracting both business investment and visitor spend. With the potential to reach a critical mass of attractions and businesses (Law, 2002), further growth is possible. Managed appropriately through policy implementation, such growth has potential to be economically and environmentally self-sustaining, whilst being able to compete with external markets on the strengths of uniqueness and identity within the region.

Policy designed to capitalise on the benefits of clusters is noted within the literature (Carrie, 2000; Brown, 2000). Based on the competitive advantage accrued through links between associated businesses (Porter, 1998), examples of cluster-related policy occur in Arizona, where eleven differing clusters were identified in 1998, including a tourism and recreation cluster. In Scotland, Scottish Enterprise adopted a cluster strategy for numerous sectors, again including tourism (Carrie, 2000). Whilst these examples comprise areas considerably larger than the Humberhead Levels, nonetheless, the principles and aims with respect to policy are similar. In such examples, policy involvement is based around identifying clusters and providing support and encouragement, with links between businesses being encouraged for their mutual benefit. Resultant benefits are for the entire region and communities. Further to this,

policy has the ability to encourage improvements in infrastructure and education in association with cluster demand. It also provides a stable economic and political background from which business can operate (Carrie, 2000). With respect to the Humberhead Levels, such factors would also be of importance in the establishment of a nature-based recreation and leisure cluster within the region.

Not all links within clusters are strong, particularly those within weak, regional clusters (Brown, 2000). This is perhaps the situation within the Humberhead Levels with the predominantly agricultural economy and sparse nature of population and settlement. In this respect, Porter (1998) suggests policies be built on existing and developing clusters, using the uniqueness of the target region rather than imitating what is done elsewhere. Similarly, as Steadman (2003) alludes to, the development of the Humberhead Levels as a visitor destination should use existing attributes to identify and attract visitors. From this, a visitor-related cluster has potential to develop, so increasing the regional economic strength and viability. The research identified collaborations between recreation businesses, and that visitors to attractions are important to other local businesses. This indicates the origins of a business cluster that could be capitalised on.

6.0.9. Policy assistance as a founding influence in visitor destination development.

Individual entrepreneurs may establish a business where they see an opportunity, with or without state assistance. However, Wilson *et al.*, (2001) note the importance of local government assistance, i.e. policy, when attempting to stimulate rural tourism development. Tourism, and so recreation and leisure, supports not just tourism businesses but those such as garages and local stores, thus referring to the development of networks and clusters. Government assistance and policy support is seen as important for numerous reasons, including infrastructure development, education facilities, funding, promotion and in ensuring that development receives local community and public support (Fleischer and Felenstein, 2000; Wilson *et al.*, 2001; Jones and Munday, 2002). Clearly, such policy cannot operate in isolation. A three-way rapport must be developed between policy makers, businesses and those communities likely to be involved or affected by development. The establishment of local tourism networks such as the Humberhead Levels Green Tourism Forum should facilitate this. They also present the basis for the establishment of a recreation business cluster in the

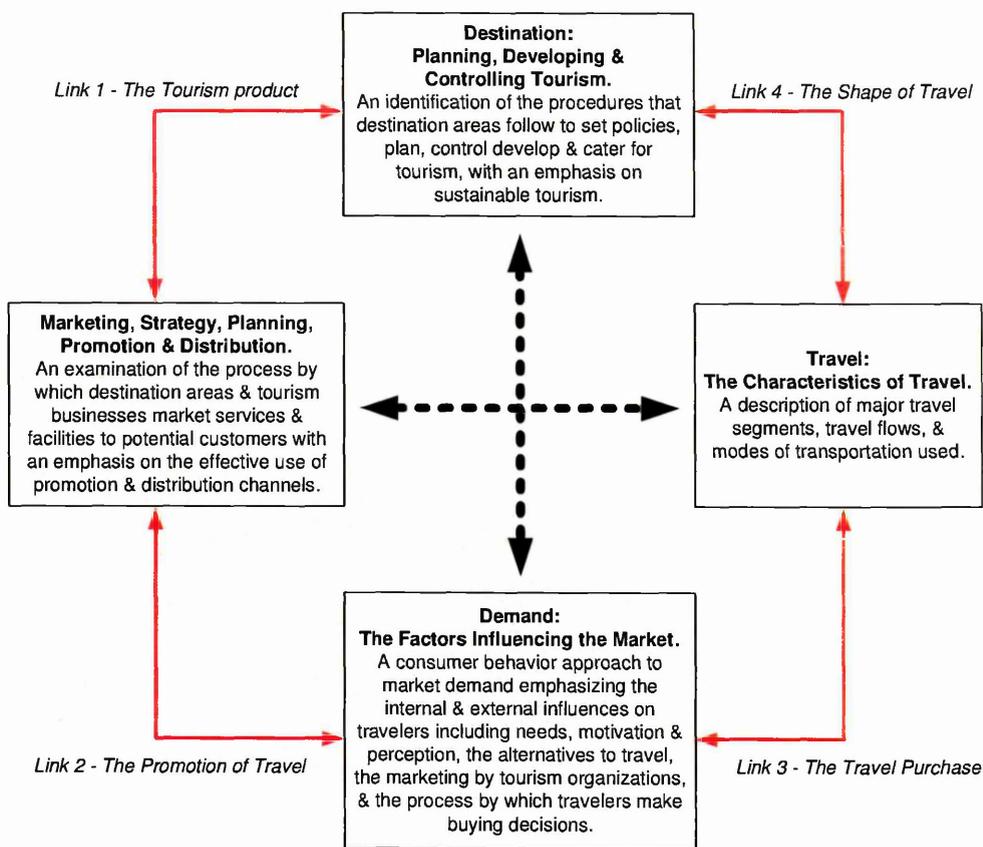
Humberhead Levels. Considered a valuable asset, assistance from governments is seen as stimulating local, private tourism developments, as noted in the research of Wilson *et al.* (2001, p135)

"tourism takes time to develop, and good relationships between local government and businesses have to be there throughout the process."

In this respect, a 'tourism system' (Mill and Morrison, 2002) developed in conjunction with all stakeholders, can be the key to encouraging development of a recreation, leisure and tourism destination.

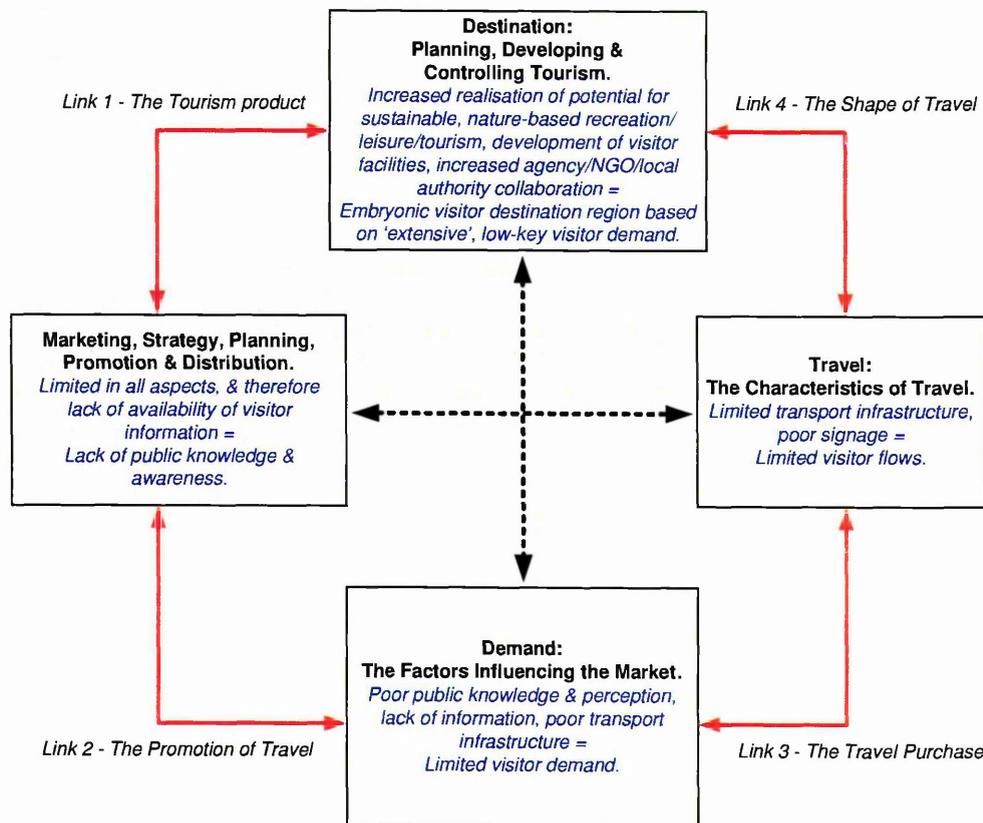
6.0.9.1. The benefits of a establishing a 'tourism system'.

Although noted as a 'tourism system', similar principles apply to nature-based recreation and leisure and visitor encouragement. In order to maximise benefits associated with nature-based recreation and leisure within the Humberhead Levels, a 'tourism system' requires establishing, Figure 16. With limited and dispersed visitor attractions (Rotherham *et al.*, 2002b), the current Humberhead Levels tourism system is more akin to Figure 17, and limited in development. The planning of nature-based leisure and recreation is the instigator for this research (Bowels and Green, 2001; Rotherham *et al.*, 2002b; Steadman, 2003), and development is being encouraged through the establishment of the Green Tourism Forum and Humberhead Levels and Moors Partnership. However, other aspects of the tourism system are currently limited.



Mill and Morrison, 2002.

Figure 16: The Tourism System.



Adapted from Mill and Morrison, 2002.

Figure 17: Humberhead Levels tourism system.

An ideal and stylised system, and noted to have various forms depending on application (Leiper, 2004), the interlinked nature of the tourism system detailed above suggests that no individual aspect has priority. Clearly, to encourage visitors, development, planning and marketing require input, regardless of the scale of visitor destination envisaged. Associated with this is the infrastructure that assists development and travel to the destination region. Whilst the limited infrastructure in terms of visitor facilities within the Humberhead Levels has been noted (Rotherham *et al.*, 2002b), transport infrastructure is also seen as a possible limitation in encouraging visitors. The ease with which visitors can access a region is critical to its success as a visitor destination. The primary, arterial roads within the Humberhead Levels enable high flows of traffic through the region. Lesser roads, whilst of generally suitable condition, do not encourage exploration of the region. With limited road signs noted by visitors and recreation businesses, the small roads and sometimes uneven road surface can be off-putting for visitors. This was also noted by visitors within the similarly landscaped Fens. Thus the 'demand' identified in the tourism system is currently met by the type of visitor who is prepared to explore an unfamiliar landscape with sometimes questionable transport routes. Without visitor demand, however, the tourism system is incomplete and redundant.

6.0.9.1i. Visitor demand as an element of the tourism system.

With respect to the Fens, the research has demonstrated a demand and liking for flat, open, landscapes. The literature offers supporting observations (Strumse, 1994a; Stedman, 2003; de Groot and van den Born, 2003). Whilst often coupled with other attractions such as wildlife and historic buildings, the landscape itself presents an alternative to the often busy, crowded visitor destinations elsewhere within the UK. This is an open, remote, peaceful landscape with easily accessible wildlife that appeals to a particular section of the visitor market. Although smaller, a similar demand exists within the Humberhead Levels, identified during this current research. Visitor demand in the Fens indicates potential demand in the Humberhead Levels.

To create a visitor demand within the Humberhead Levels, an understanding of the visitor type is required. From this marketing and development can proceed. Noted as older and often retired, with a keen interest in wildlife and aspects of the landscape, the identification of the predominant day-visitor type by the research offers avenues for

marketing the region. As an open, dynamic system that reacts with its surroundings (Mill and Morrison, 2002; Leiper, 2004), the tourism system can be designed to fulfil identified demand, with planning and marketing designed to be more or less specific depending on policy requirements and identified visitor markets, i.e. the day-visitor market. Should demand alter, the tourism system can be altered to suit, or indeed, target certain visitor types. However, an excessively targeted marketing and planning regime may attract specialised visitors, such as bird watchers or anglers. Whilst important, such niche markets may be comparatively limited. A broader approach to marketing will enable a broader spread of visitors to be attracted, thus creating a broader demand for visitor facilities and attractions. Such an approach reduces market vulnerability and lessens the potential for a decline in a single target market to adversely affect the overall visitor market, providing an element of security for the economy of the Humberhead Levels region as a whole.

6.0.9.2. The tourism system as a factor of destination development within the Humberhead Levels.

As a stylised model, Figure 16 illustrates an ideal situation in which all aspects of the tourism system are complete and operate in harmony. However, the reality of existence even within an existing, fully functioning visitor destination is likely to encounter problems. The vagaries of visitor demand, policy and individual business aims can all act to reduce the efficiency of a tourism system, and thus impact on the benefits to be gained from a visitor market. The failure of such a system to operate in an effective manner, i.e. to the benefit of all, has implications for the development and longevity of visitor destinations as illustrated within Butler's (1980) tourist area life-cycle, presented in Figure 20. The lack of a coherent approach to visitor destination development and the resultant requirements of visitor demand could lead to the development of a visitor market that is of short-term in nature. It might reduce local control and income retention through an opportunistic development by external businesses with little consideration for the local population and communities. Thus stagnation and decline may become rapidly apparent as the uniqueness and therefore visitor novelty of the destination fades, with responsibility falling on Local Authorities and communities with respect to instigating redevelopment (Butler, 1980; Ryan, 2003).

With such factors noted, the incomplete tourism system within the Humberhead Levels is presented (Figure 17). As such it highlights issues for consideration within the development of a nature-based recreation and leisure market that will maximise local economic benefit and maintain local control. Factors such as accommodation and transport infrastructure will require considerable investment and time to develop. Nonetheless, with the research identifying a predominantly day-visitor market, the model illustrated (Figure 17) highlights aspects that could be encouraged and developed with respect to the identified day-visitor demand. Existing policy and development involvement is identified as support for the Green Tourism Forum and Humberhead Levels and Moors Partnership, and as business development grants and advice from DEFRA and Business Link South Yorkshire¹⁴. The identified collaboration between Local Authorities and between 'competing' local visitor attractions demonstrates an increasing realisation of the benefits of a combined marketing approach. This should increase public awareness of the Humberhead Levels and what the region has to offer visitors. A collective approach to maximising and encouraging the benefits from the identified day-visitor market will encourage the establishment of a tourism system. This will also encourage the development of business clusters and their associated benefits. The development of a tourism system should capitalise on existing attributes in the Humberhead Levels, as suggested by Steadman (2003), and Porter (1998) in respect of business cluster establishment. Therefore, as a model for developing a day-visitor market based on the Humberhead Levels attributes, the tourism system presented in Figure 16 offers a guide. This can be applied to develop the presently incomplete Humberhead Levels tourism system (detailed in Figure 17).

6.0.10. Policy considerations on the instigation of nature-based recreation and leisure.

The research generally supports the potential for nature-based recreation and leisure. However, observations raised issues that require consideration. Not least of these is the issue of market saturation with respect to visitor attractions (Law, 2002). This was an issue also identified during the interview process undertaken during this study, with respect to the development of wetlands as wildlife habitat and visitor attractions within the UK.

¹⁴<http://www.blsy.com/>. 26/10/2005.

With visitor demand within the Humberhead Levels and associated demand for niche visitor markets noted as being comparatively low, and with numerous wetland and wildlife visitor attractions in existence and being planned throughout the UK, there is potential to dilute the visitor market. The displacement effect of tourism as a resource-dependant business (McKercher, 1993; Cooper *et al.*, 1998) negatively affecting existing sectors is equally applicable to visitor attractions. As Woodward (2002) observes with respect to industrial heritage attractions, whilst the number of visits overall were noted to increase, this was due to an increase in the number of visitor attractions. Average visitor numbers at individual attractions themselves were falling. The increase of industrial heritage attractions "*diluted*" the pool of existing visitors (Law, 2002, p.83), with attractions having to fight to maintain their market share (Woodward, 2000). As such, new visitor attractions can be predatory with respect to existing visitor attractions. There are a limited number of visitors to share, and less so within niche visitor markets. Thus whilst the Humberhead Levels could gain in visitor spend, other regions with wetland attractions may lose visitor spend, and inter-regional policy issues therefore need to be considered.

With respect to potential visitors to wetland and associated wildlife attractions though, based on membership of wildlife organisations, demand appears to be growing. (It is difficult, however, to quantify this as a component of the overall UK visitor market). Membership of the Wildfowl and Wetlands Trust increased by almost 9% over the period 2002-03, and increased again by 14% in the period 2003-04 to over 126,000 members. Visits to almost all Wildfowl and Wetlands Trust reserves increased over the same periods (WWT, 2003 and 2004). RSPB membership increased by almost 15,000 to 1,036,869 during 2002-03, with a noted popularity for bird and conservation-related activities organised by the RSPB (RSPB, 2003 and 2005). On a smaller scale, membership of the British Trust for Ornithology increased by 2.4% to 12,791 members (BTO, 2005). Such increases in membership are not just related to ornithological organisations. Local wildlife trusts are also noted to have increased membership, with the Warwickshire Wildlife Trust increasing membership two years in succession, with membership increasing by around 12.5% to 10,453 members for the period 2002-03 (Warwickshire Wildlife Trust 2003 and 2004). Whilst there is likely to be some overlap of membership between such organisations, and increases in visitor numbers may also be related to the development of visitor attractions at wildlife reserves, as witnessed by the development of the RSPB's Old Moor reserve (Rotherham *et al*, 2004a),

nonetheless, these above examples illustrate the popularity of wildlife and in particular birds. As such, whilst the potential saturation of a visitor market associated with wildlife and nature-based recreation and leisure is to be considered, in the current nature-based recreation and leisure climate, this is not thought to be an imminent issue. It is less so in a region of limited visitor attractions such as the Humberhead Levels. Further to this, it was noted during data collection within the Fens that many visitors to WWT Welney and RSPB Ouse Washes reserves visit both reserves during the same day. They do not consider the close proximity of the two reserves a detriment. Rather, the presence of a café and shop at WWT Welney offers a different visitor experience than the more spartan RSPB Ouse Washes reserve.

Further issues of policy were also noted during data collection. Concerns were expressed by landowners of being caught in a 'subsidy trap' whereby land set aside for wildlife benefit under subsidy payments cannot at a later date be returned to productive agricultural use. Hodge (2001) notes similar concerns, suggesting farmers may be reluctant to enter environmental schemes, fearing an imposition of environmental designations that restrict the use of their land as a means of protecting whatever environmental benefits arise during a scheme's tenure. Issues of planning regulations and their implementation also cause consternation amongst recreation businesses surveyed. Such observations are supported by the Cabinet Office Performance and Innovation Unit report (HMSO, 1999), which observes that planning regulations can be restrictive, with the potential for rural communities to "*wither*" (HMSO, 1999, p.71) should development be stifled. Whilst planning regulations have since been modified in light of such criticisms (CRR, 2003), clearly, difficulties still remain. Recreation businesses surveyed commented on the difficulties of gaining planning permission to erect brown, tourism road signs, whilst erecting their own advertising signs often contravened planning regulations. Thus policy implementation can seem inconsistent in some aspects, and askance with respect to encouraging visitors and economic regeneration.

These issues would not necessarily prevent the adoption of a policy encouraging the creation of wetland and wildlife sites to aid economic regeneration. However, they do identify potential areas of conflict amongst stakeholders within policy implementation. They therefore require consideration, since all stakeholders have an input to any such development.

6.0.11. Issues regarding the level of visitor development and dependency on visitor input.

In attracting visitors, the levels of required visitor intensity and demand should be considered. Clearly, for the Humberhead Levels, the limited visitor facilities preclude mass tourism development. As noted elsewhere, visitor demand is likely to be limited within the first instance. However, Steadman (2003, p.51) considers the potential for day-visitor attractions to be "*considerable*", particularly in association with nature-based and wetland habitat attractions. Furthermore, as acknowledged within the literature, tourism and visitor developments can be detrimental to the wider environment, employment diversity and income potential (Cooper *et al.*, 1998; Herath, 2002; Mazzanti, 2002). In order to limit damage, consideration must also be given to these factors.

It is important to consider the nature of the landscape and economy in question, the potential visitor market, and the aims for encouraging nature-based recreation and leisure. As discussed (section 2.5.0), flat and level landscapes are less popular than more hilly and mountainous landscapes as visitor destinations. So visitor numbers are likely to be limited but with potential within the Humberhead Levels, especially in conjunction with the ecological resource. With the aim of increasing income and employment potential, and thus community viability within the Humberhead Levels, it is important that any visitor development occur in conjunction with existing economies, rather than subsuming and replacing them. By becoming the dominant economy, visitor development might replace the agricultural economy, changing employment demands and income sources (Zhou *et al.*, 1997; Fleischer and Felsenstien, 2000), rather than adding to the existing resource. As a resource-demanding activity (McKercher, 1993), visitor development has potential to compete with and smother existing economies. It can create an over-reliance on the visitor market, Figure 18, to the detriment of viable economic longevity and social gain (Grefe, 1994). An economy based solely on visitor income is no more secure than an economy based solely on agriculture.

The actual level of visitor development and intensity within the Humberhead Levels will depend on a number of factors. In the immediate term, excessive visitor impact is unlikely. In considering the longer-term, Figure 18 illustrates potential levels of visitor intensity, and their potential input proportions within local economies.

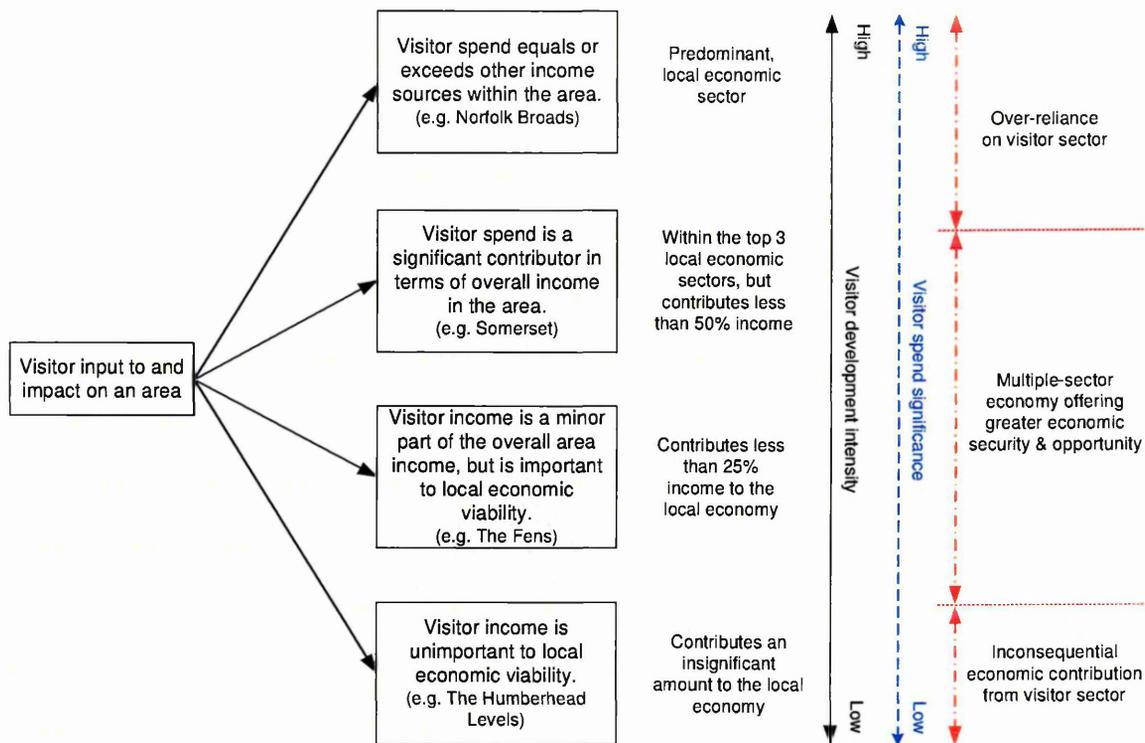


Figure 18: Levels of visitor development intensity, spend significance and economic reliance.

Regardless of the chosen level of intensity, visitor development must fit within the local character and culture of the region. It should consider the visitor carrying capacity (Hall and Page, 2002) of the region in respect of visitor numbers and associated impacts. The imposition of an inappropriate level or type of visitor development is likely to alienate local populations, and fail to produce the desired economic benefits. Thus the model presented within Figure 18 details differing levels of visitor development and the potential reliance on visitor income that could occur should a visitor-based economy become predominant. As such, the model illustrates the current position of the Humberhead Levels with regard to visitor development intensity and reliance on visitor income, with that income being limited in value. As a development option, with the limited number of attractions in the Humberhead Levels (Rotherham *et al.*, 2002b), an appropriate development intensity is represented in the model by the Fens, at 25% or less of overall income generation in the region (Figure 18). As such, a low-key, unobtrusive recreation and leisure market based on the natural resource, i.e. landscape, wetlands, and wildlife, presents a low investment opportunity to compliment the existing agricultural economic base. This would contribute to the overall economic viability of the region.

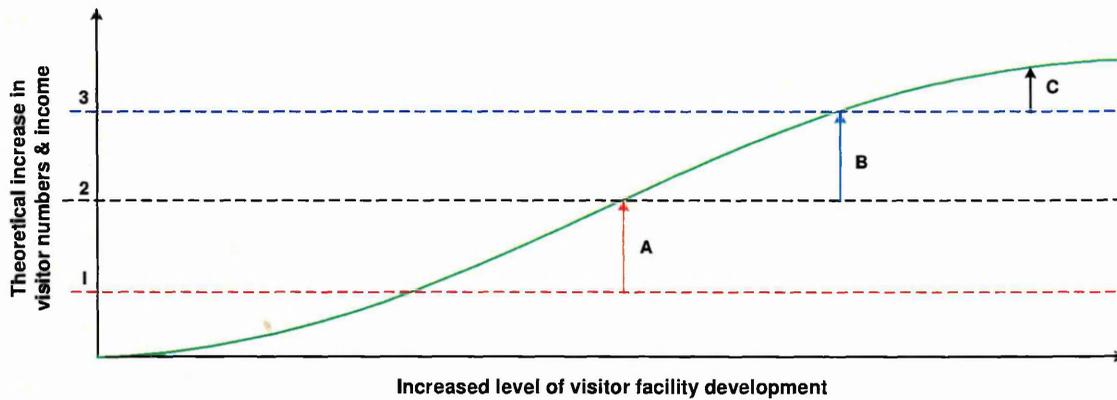
6.0.11.1. Carrying capacity as a factor of visitor development.

Identified within the literature review (Chapter Two), and discussed within the concept of visitor development intensity, is the concept of carrying capacity. Difficult to conceptualise (Hall and Page, 2002) and noted by Walter (1982, in Urry, 1995) as an issue of perception, visitor carrying capacity refers to the ability of a location to absorb an influx of visitors and recreational activity without perceived or actual detriment, whether physical, ecological, economic or social (Hall and Page, 2002). Whilst physical damage to the landscape can be obvious, carrying capacity can also be subjective to an individual's preferences. For many, crowds are a requirement for an enjoyable visit. For others, another person is one too many (Urry, 1995). Further to this, and critical to nature-based recreation and leisure, ecological damage can be difficult to observe, and can occur imperceptibly, with little indication of decline until the ecological resource is depleted and damage irrecoverable (Pigram and Jenkins, 1999). With differing species of flora and fauna being more or less susceptible to disturbance and damage (Liddle, 1997), the identification of resource degradation in terms of species variety and numbers is made more complex.

The difficulty for policy, therefore, is to assess and measure visitor carrying capacity and apply limitations on development that encourage appropriate development without stifling enterprise within rural areas as a finite and fragile resource (Sharpley, 2003). Whilst levels of carrying capacity can be subjective to an individual's perspective (Hall and Page, 2002), when exceeded physically or perceptually, visitor numbers decline, with perception being noted as a critical factor in visitor assessment of carrying capacity limits (Butler, 1980; Pigram and Jenkins, 1999). Tranquillity, openness, and emptiness of the Humberhead Levels and Fens landscapes are noted as attractions in the visitor surveys (Table 33 and Table 108), and the interruption of tranquillity considered a disturbance (Liddle, 1997). Such criteria are important in considering visitor development.

Thus for policy and development considerations, at what level should visitor numbers and carrying capacity be set, if at all? Whilst issues of carrying capacity are not expected to be of importance within the foreseeable future within the Humberhead Levels, nonetheless, as a dynamic concept which, if exceeded, could be detrimental to the visitor resource and thus visitor market (Hall and Page, 2002). Such issues require

consideration with respect to the long-term management of a visitor destination, particularly in respect of attractions based around an environmental and wildlife resource. Figure 19 illustrates theoretical increases in visitor numbers and spend in association with increased visitor facility development, potentially applicable within the Humberhead Levels.



Improvements to visitor facilities and resources to encourage visitor numbers;

A. Improvements to landscape (aesthetics) & land use, ecological resource, basic visitor facilities (cafes, pubs, existing attractions, basic accommodation), visitor directions (signs, maps, information). Increased opportunity to spend. Increased marketing and development.

B. Increased improvements to visitor facilities: higher profile attractions, improved transport infrastructure, increased accommodation types and quality (increased propensity to stay), increased food and drink outlets. Greater opportunity to spend. Further marketing and development. 'History' of visitors and tourism developing within the Public conscience.

C. Increase of staying visitors relative to day visitors. Much improved accommodation type and quality, efficient transport infrastructure and visitor facilities. Heavily marketed, high profile attractions.

1. Current level of income based on current visitor numbers, infrastructure and visitor facilities.

2. Level of income with improved environmental resource, increased visitor numbers, infrastructure and facilities.

3. Level of income associated with high numbers of day visitors, overnight staying visitors and tourists associated with greatly improved visitor infrastructure and facilities.

— Growth in visitor 'product' - theoretical visitor carrying capacity increasing as visitor facilities developed.

Figure 19: Illustration of hypothetical levels of visitor carrying capacity associated with increased visitor facility development.

The benefits of maximising visitor carrying capacity, as illustrated by 'C' in Figure 19, should engender a greater number of visitors. This should produce a greater return on development investment and increased economic viability, although at a higher initial investment cost. Such development can engender a self-promoting effect, drawing in further income in the manner of clusters, as noted within sections 2.1.3. and 6.0.8.1. However, an intense level of visitor development can be detrimental to the existing economic base, with an over-reliance being placed upon visitor income, (Figure 18). Further to maximising and potentially exceeding carrying capacity, once a visitor destination reaches saturation limits in terms of visitor numbers, in association with factors such as traffic, litter, damage to the environment and alienation of local populations, visitor numbers are likely to fall (Cooper *et al.*, 1998). There are then

consequences for income. Without a secondary economic base to offset falls in visitor income, economic and community viability is lessened in line with falls in visitor numbers. Thus, maximising carrying capacity can attract an initial, high influx of visitors and associated spend, but often in a rapid, unsustainable manner, with the potential for gains achieved to be comparatively short-lived. Such a situation is therefore in effect a long-term 'cost' that requires off-setting against benefits initially accrued. Should such a situation occur, increased investment will be required to rejuvenate visitor attractions and dispel poor reputations and images as a visitor destination, much in the manner of extending a product life-cycle (Adcock *et al.*, 2001), a concept adopted by tourism studies with respect to visitor destinations (Butler, 1980; Cooper *et al.*, 1998), and discussed in section 6.0.12.

With the sustainability of maximising carrying capacity in question, a more appropriate and beneficial approach to nature-based recreation and leisure development is that of a low-key approach. This is illustrated by 'A' and to some extent 'B' in Figure 19. Although visitor numbers at any one time will be less than the maximum, over the life of an attraction, a greater number of visitors could be catered for whilst also engendering a more sustainable, longer-term visitor market (Butler, 1980). Although the limited visitor facilities within the Humberhead Levels as identified by Rotherham *et al.*, (2002b) precludes adopting a rapid development of the visitor market without excessive and vulnerable investment in any case, a low-key approach allows visitor development to be tuned to local needs, benefits and environmental considerations, as discussed in section 6.0.8. Furthermore, such low-key development can be undertaken in conjunction with the development of a tourism system and associated business cluster development, as discussed previously within this chapter and introduced within the literature review (Chapter Two). Potential conflicts of resource use can be reduced, whilst also allowing the carrying capacity limits associated with rapid change to be avoided, i.e. excessive demand on insufficient infrastructure. Low-key development allows the economy to adjust to new demands, with the local skills base being developed, as opposed to the import of skilled personnel reducing local employment opportunities. Factors that could constrain carrying capacity at a low level, such as transport infrastructure, can also be up-graded in line with development (Cooper *et al.*, 1998; Mazzanti, 2002). Further to this, and in line with the aim of providing alternative forms of income, gradual development of visitor resources are less likely to impinge on the predominant agricultural economy within the Humberhead Levels. Slow and low-

key development of nature-based visitor attractions will allow a 'settling' of demands to occur, engendering a more sustainable visitor market in conjunction to the existing agricultural economy. This reduces costs often associated with rapid and excessive tourism development.

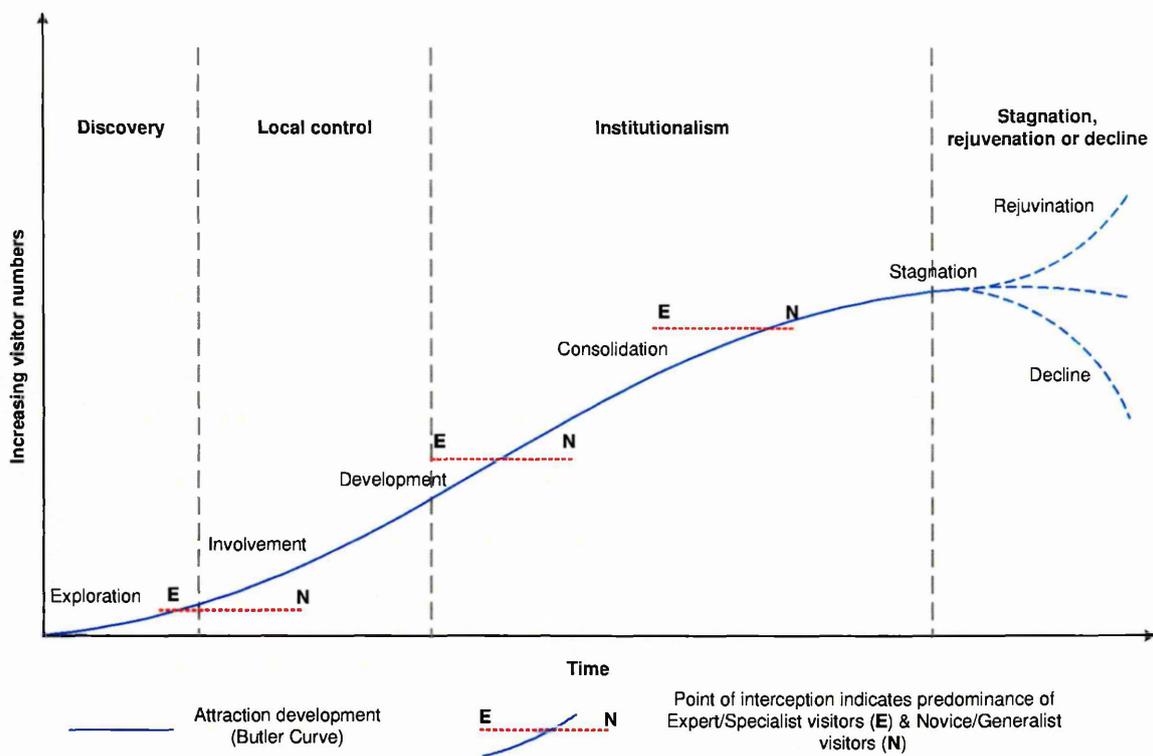
6.0.12. Carrying capacity and the tourist area-visitor attraction life-cycle.

As noted above, exceeding the carrying capacity of an attraction in any form can precipitate attraction decline, requiring remedial action. As such, visitor attractions follow similar stages to the product life-cycle in that they are 'launched', develop, mature and then often reach the point of stagnation and decline (Cooper *et al.*, 1998; Massey, 1999; Adcock *et al.*, 2001). Presented by Butler (1980), and much discussed within the literature (Agarwal, 1997 & 1998; Oppermann, 1998; Cooper *et al.*, 1998; Ryan, 2003), the tourist area or visitor attraction life-cycle encompasses several stages of development, as detailed in Figure 20 and Table 101. Although Figure 20 and the following figures detail changes in the cycle stages, it should be noted that the process, whilst appearing linear in the eventual outcome of stagnation, is not linear in terms of time lapsed between differing development stages (Agarwal, 1997), and is a representation of development stages only. The shape of the cycle is likely to vary between differing regions and attractions, and their associated development (Butler, 1980). Indeed, if an attraction is based around a shy, easily disturbed fauna species, development may never get beyond the exploration or involvement stages, development stalling and stagnating once the attractant species has been scared away, the ecological carrying capacity having been exceeded.

As discussed between Agarwal (1997 and 1998) and Oppermann (1998), Butler's (1980) tourist area life-cycle has been criticised for being too rigid in its outcome, and not applicable to many situations. However, as an indication and guide to possible development stages, particularly with respect to local involvement and sustainable visitor market strategies, the life-cycle has merit (Cooper *et al.*, 1998).

In a similar manner, although adopting a visitor perspective, Cohen and later Plog (1974; 1977, in Ryan, 2003), classify visitor types. Again noted within the literature (Butler, 1980; Cooper, 1992; Agarwal, 1998; Mill and Morrison, 2002), Cohen offered

an Organised mass tourist - Individual mass tourist - Explorer - Drifter continuum, whilst Plog provided an Allocentric - Midcentric - Psychocentric continuum. As such, drifter-explorer, allocentric visitors arrive at a destination first, and are compatible with Butler's exploration stage. As a visitor attraction develops, visitor types shift to the more organised, midcentric and mass tourism - psychocentric profile identified on Butler's attraction life-cycle by the development and consolidation stages. With respect to wildlife and nature-based tourism, Ryan (2003) suggests environmentally aware visitors represent the drifter-explore visitor type, with an increasing trend towards mass tourism as an attraction or region becomes better known. Higham (1998) concurs with respect to Albatross viewing in New Zealand, detailing Duffus and Dearden's (1990, in Higham, 1998) adaptation of Butler's attraction life-cycle to represent the changes in visitor types to wildlife attractions, from expert to non-expert, 'novice' visitors, Figure 20. From such descriptions of changes in visitor types and attraction development, it is clear policy has a role to play in maximising benefits without detriment to the longevity of an attraction (Butler, 1980), or, with respect to wildlife attractions and the observations made by Higham (1998), to the wildlife resource. As Higham (1998) notes, increased visitor numbers demand increased visitor facilities, which encourages further, more generalist visitors. Increased visitor numbers can not only lessen the visitor enjoyment through over crowding, but also encourage unrealistic expectations of non-expert visitors with respect to what they have come to see and do. Thus an element of dissatisfaction is engendered, with the potential that the attraction is unable to fulfil visitor's expectations. With expert and specialist visitors giving way to non-expert visitors, such a scenario is more likely at a wildlife attraction, and represents the higher stage of consolidation and potential stagnation highlighted on the attraction life-cycle (Butler, 1980).



Source: Butler, 1980, & Cooper *et al.*, 1998.

With additions from Duffus and Dearden, 1990, in Higham, 1998.

Figure 20: Butler's hypothetical tourism life-cycle, with additions.

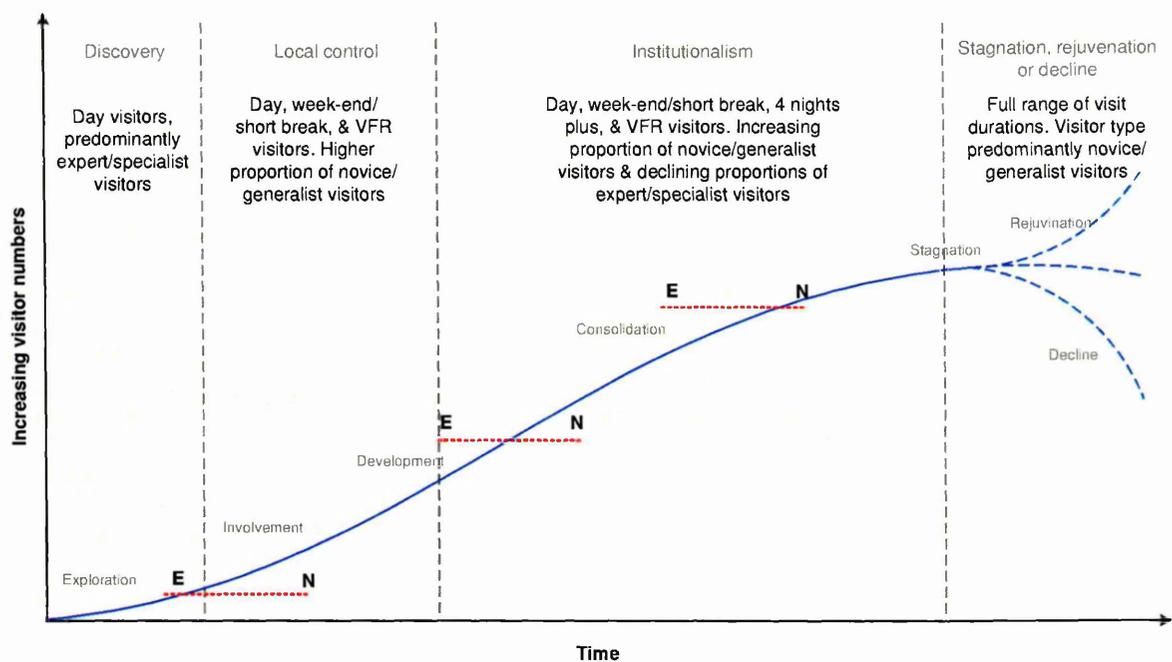
| Stage | Characteristic |
|------------------------|---|
| Exploration | <ul style="list-style-type: none"> • Few adventurous tourists, visiting sites with no public facilities • Visitors attracted to the resort (or region) by a natural and or physical feature • Specific visitor type of a select nature, e.g. specialist wildlife/nature-based visitor |
| Involvement | <ul style="list-style-type: none"> • Limited interaction between local residents and the developing tourism industry leads to provision of basic services • Increased advertising induces a definable pattern of seasonal variation • Definite market area begins to emerge |
| Development | <ul style="list-style-type: none"> • Development of additional tourist facilities and increased promotional efforts • Greater control of tourist trade by outsiders • Number of tourists at peak periods far outweighs the size of the resident population, inducing rising antagonism by the latter towards the former |
| Consolidation | <ul style="list-style-type: none"> • Tourism has become a major part of the local economy, but growth rates have begun to level off • A well-delineated business district has taken shape • Some of the older deteriorating facilities are perceived as second rate • Local efforts are made to extend the tourist season |
| Stagnation | <ul style="list-style-type: none"> • Peak numbers of tourists and capacity levels are reached • The resort has a well-established image, but it is no longer in fashion • The accommodation stock is gradually eroded and property turnover rates are high |
| Post-Stagnation | <ul style="list-style-type: none"> • Several possibilities, reflecting a range of options that may be followed, depending partly on the success of local management decisions. At either extreme are rejuvenation and decline |

Adapted from Agarwal, 1997, citing Butler, 1980.

Table 101: Butler's tourist area life-cycle development stages.

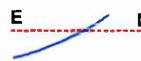
6.0.12.1. The tourist area life-cycle within the Humberhead Levels - visit duration and visitor expertise.

The predominant visitor profile in the Humberhead Levels is of day-visitors, many with an interest in wildlife and the landscape. The perceived and actual lack of visitor facilities (Rotherham *et al.*, 2002b) suggests that the region is at the stage of exploration on the visitor destination life-cycle. By comparison, the Fens, with a more organised approach to attracting visitors and with greater numbers of visitor facilities, is further developed. It is a better known region containing attractions such as Ely and Cambridge as well as wildlife sites such as WWT Welney and RSPB Ouse Washes. Considering the overall predominance of day-visitors, Figure 21 illustrates the position of such visitors and stay duration in Butler's (1980) tourist area life-cycle. It includes the context of changes in proportions of expert - novice visitors identified by Duffus and Dearden (1990, in Higham, 1998) and developed by Higham (1998) and Ryan (2003). Whilst an increase in visitor numbers and in proportions of staying visitors will have implication for economic gains, the research suggests that, within the foreseeable future, visitor types within the Humberhead Levels are likely to remain in the day-visitor - short break category. This is the involvement - development stage of the tourist area life-cycle. Whilst this might seem limiting in terms of economic gain, such development is likely to provide benefits of local income retention and local control, and thus more holistic benefits for existing economic sectors and local communities. At such low levels of development, visitor and tourism markets are unlikely to impinge on existing sectors, or encourage displacement of resources. They will therefore increase opportunity rather than subsume it.



— Attraction development (Butler Curve)

VFR = Visiting Friends & Relatives



Point of interception indicates predominance of Expert/Specialist visitors (E) & Novice/Generalist visitors (N)

Adapted from Butler, 1980, & Cooper *et al.*, 1998.

With additions from Duffus and Dearden, 1990, in Higham, 1998.

Figure 21: Visitor area life-cycle: visitor type and visit duration within the Humberhead Levels.

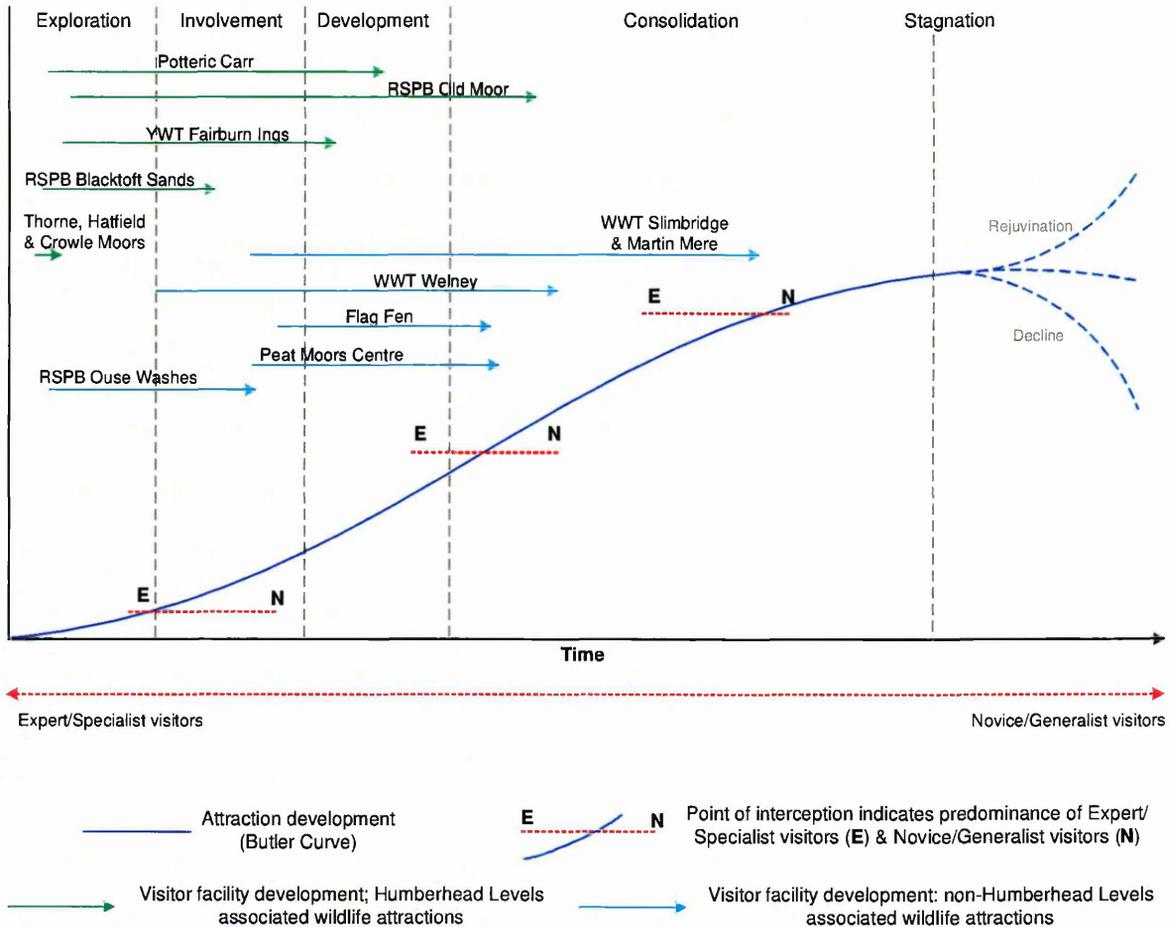
6.0.12.2. The tourist area life-cycle within the Humberhead Levels - nature-based attraction development.

The lack of visitor attractions within the Humberhead Levels (Rotherham *et al.*, 2002b), suggests that the region is at the stage of exploration within the tourist area life-cycle. Such attractions as there are within the region receive comparatively little marketing and publicity, and consequently few visitors. Thus an exploration of the region as it exists is likely undertaken by Cohen's drifters and explorers, and Plog's allocentric visitors (Ryan, 2003). However, within the region, nature-based attractions such as RSPB Blacktoft Sands, Potteric Carr Nature Reserve and RSPB Old Moor demonstrate wildlife-based attractions that, whilst originally the preserve of specialist visitors now, through increased funding, development and marketing, appeal to a more generalist visitor. With respect to RSPB Old Moor, development of on-site facilities by the RSPB has encouraged a greater range of visitor types, noted by Rotherham *et al.* (2005b), and *The Star* (2005). Similar observations were noted during data collection within the Fens

at sites such as WWT Welney and Flag Fen. The addition of a café at an attraction becomes an attraction in its own right. In light of the appeal of improved attraction facilities, and thus potential income generation, WWT Welney is due for modernisation during 2005/2006, having attracted £2.8 million in funding. The potential for increased income generation via visitor spend was a critical component in obtaining development funds (e-mail correspondence, WWT, 12/10/2004). The importance of attraction facilities is further discussed in section 6.0.15.

Appealing to a broader range of visitors will alter the proportions of expert - novice visitors in favour of novice visitors (Higham, 1998). Nonetheless, with the aim to increase economic viability within the Humberhead Levels, this requires consideration. Figure 22 illustrates nature-based attractions that have, through development, altered their position relative to the tourist area life-cycle. Also noted within Figure 22 are attractions that started at the 'involvement' stage, rather than at the 'exploration' stage. Attractions such as Flag Fen, based around an archaeological site, were developed from public funds as a visitor attraction at a set level of (expected) visitor demand. By contrast, sites such as Potteric Carr were developed from an expert, enthusiast base, being developed into a visitor attraction as a means of obtaining funds to enlarge the nature reserve. Visitor spend was a means to an end as well as a contributor to local economies, with the reserve itself becoming an important social asset (Rotherham *et al.*, 2002a). Thus initial visitors to Potteric Carr were of the explorer - expert profile. The position of each attraction within the cycle therefore depends greatly on its development stage and intended aim, i.e. to primarily provide wildlife habitat (RSPB Blacktoft Sands and Ouse Washes), or to provide the public with a wildlife-based spectacle in association with conservation and education (WWT Welney, Slimbridge and Martin Mere). As an example, whilst the consolidation stage, Figure 20, for a non-specialist, novice visitor-based attraction may entail regular refurbishment of facilities to maintain visitor demand, the consolidation stage for an expert-based visitor attraction may simply entail maintaining signs and simple bird hides. Further to this, factors such as policy, competing attractions and, as noted, changes in visitor types can all affect an attraction's relative position within the life-cycle (Agarwal, 1997). The concept of a cycle does suggest, however, that, given time, visitor attractions will progress along the cycle to the point of stagnation, decline or rejuvenation. How quickly this occurs is dependant on many factors, not least public trends and an attraction's ability to read and predict the

visitor market. It is also affected by policy decisions that may impinge on the visitor market, such as agricultural and water management policies.



Adapted from Butler, 1980, & Cooper *et al.*, 1998.
With additions from Duffus and Dearden, 1990, in Higham, 1998.

Figure 22: Visitor area life-cycle: nature-based attraction development.

6.0.12.3. The tourist area life-cycle within the Humberhead Levels - expected visitor demand.

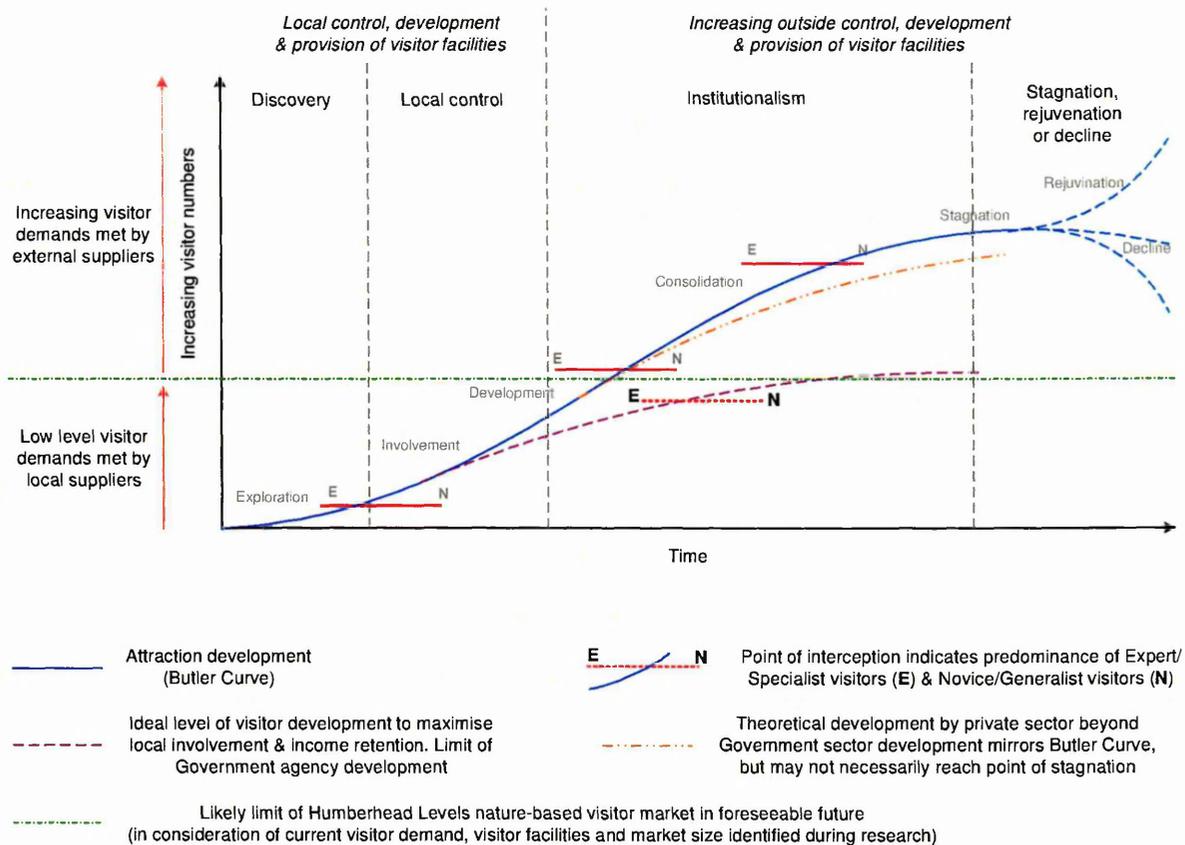
Due to the lack of developed visitor attractions within the Humberhead Levels (Rotherham *et al.*, 2002b), and the small but important visitor demand noted for similar landscapes such as the Fens, initial visitor demand within the Humberhead Levels will be limited. Whilst Rotherham *et al.* (2002b) noted numerous niche visitor market possibilities within the region, even with support from Government agencies and NGOs, the development of a fully functioning visitor market will likely take considerable time. It is unlikely to reach the latter stage of development or consolidation as described in Table 101. Although this will lessen potential income generation overall, the slow approach to visitor market development will engender greater local control and local

benefit. As Butler (1980, in Agarwal, 1997) notes in Table 101 and as detailed in Figure 23, the exploration and involvement stages entail greater local involvement, and therefore greater local incentive to become involved within an emerging visitor market. Beyond the development stage, Butler's cycle suggests that outside providers and influences take increased control of the visitor market at the expense of local populations. Local providers may be unable to meet a rapid increase in visitor demand, thus offering openings for more experienced and opportunistic external visitor and tourism suppliers who thence receive the benefits of visitor spend, an occurrence noted by Higgins (1996). Whilst Government agencies and policies may support a growing visitor market, this is likely to be limited to aiding establishment of a visitor market that benefits local communities. The full and continued development of a visitor market is the preserve of the private sector. Thus, with the experiences of failed visitor attractions noted in section 6.0.3., Government agency involvement is indicated at a low level in Figure 23.

As well as aiding local involvement, a slower developing visitor market enables it to be tailored to the local situation, and adapted through experience (Oppermann, 1998). Such an approach removes much of the suggested inevitability and rigid, '*straightjacket*' (Cooper, 1992, p.65) approach for which Butler's tourist area life-cycle has been criticised (Cooper, 1992; Agarwal, 1998). This may then avoid stagnation of the associated visitor market.

With these considerations noted, Figure 23 details the potential development of a visitor market within the Humberhead Levels at a low level. This is the expected level of the visitor market for the foreseeable future. Such a low level is unlikely to be due simply as a result of limited visitor demand, but more likely a combination of factors, including community involvement, visitor infrastructure and associated development lag. Predominant amongst these is their perception as flat, level landscapes and their associated limited appeal to the wider UK population. The research identified a liking for such landscapes and what they can offer, but the cultural shift needed to make them more appealing to the wider public would require considerable effort. Thus the potential visitor demand detailed in Figure 23 is based on known potential niche markets detailed by Rotherham *et al.* (2002b), with a bias towards expert and specialist visitors, illustrated by E N within Figure 23. Identified niche markets include wildlife viewing, fishing, equestrian, cycling and walking activities, all activities which benefit

from an improved environmental resource, and give added incentive to manage the landscape in an holistic manner.



Adapted from Butler, 1980, & Cooper *et al.*, 1998.
With additions from Duffus and Dearden, 1990, in Higham, 1998.

Figure 23: Tourist area life-cycle: visitor demand within the Humberhead levels.

6.0.13. The benefits of a publicly funded visitor attraction.

In addition to attraction development, the day-visitor profile identified during the research (section 4.3.0.), lends itself to a low-key approach. The older profile of visitors identified further lends itself to nature-based recreation and leisure, particularly with respect to off-peak and special interest visits (Bowels and Green, 2001). As Bowels and Green, (2001), Rotherham *et al.* (2002b), and Steadman (2003) note, there is potential for using existing attractions within the Humberhead Levels, particularly with respect to specialist, niche markets including birdwatching, walking, cycling and fishing. Low-key development of nature-based recreation and leisure would enable a visitor market to be established using these identified attractions. They could be marketed to the visitor profile identified during the research, and this might be preferable to creating new attractions for new, possibly disinterested visitor markets.

With wetland creation as wildlife and visitor attractions (with potential for flood defence and water storage) considered by the Wildlife Trust of Cambridgeshire (PACEC, 2004), and with the enlargement of the National Trust's Wicken Fen and the Wildfowl and Wetland Trust's Welney sites, the scale of envisaged attractions should be considered. As noted in section 6.0.2., and illustrated in Figure 13, the traditional tourism perspective of intensive tourism and flagship attractions as economic generators are not necessarily appropriate as development options. Income leakage lessens local economic benefits, whilst lower than estimated visitor numbers at high profile attractions can lead to financial difficulties and insolvency. However, the lack of a significant visitor market within the Humberhead Levels, and the dispersed and low-key nature of existing attractions, suggests that a grant-supported attraction or visitor centre¹⁵ based around the wetland and wildlife resource has potential to establish a visitor demand through increased regional exposure. That visitor centres and indeed attractions can be instrumental in encouraging visitors to visit is noted by Pearce (1989) and the Countryside Agency (2000a). A lack of visitor facilities, either within a visitor destination or at attractions themselves, can reduce visitor enjoyment. This may discourage visits in the first instance and repeat visits in the second (Priskin, 2001). From a visitor centre, further attractions and facilities can be marketed and visited, thus filtering potentially significant economic benefits through the local economy (Figure 24), and with respect to business clustering (Figure 15). Thus the grant-supported visitor centre acts as the primary visitor-region contact point. From this, privately owned visitor attractions and facilities receive the benefits of increased visitor numbers without the visitor centre operating costs (Rotherham *et al.*, 2004b). This encourages the generation and recycling of visitor income within the region, albeit in a subsidised manner.

Without a visitor centre of some description, it is conceivable that a visitor market within the Humberhead Levels would never gain momentum or become a significant economic contributor within the region. This is in spite of the increasingly collaborative efforts of the Local Authorities, noted during interviews (section 3.4.3.). That a market

¹⁵ 'Visitor centre'; for the purposes of this research, a visitor centre is as described within Countryside Agency, 2000a, p.2. Principally, this comprises a centre from which visitors can obtain information on the local area, culture, heritage and attractions. Such a centre may also be serviced with a car-park, public toilets, catering and retail facilities. As described, such visitor centres are generally operated through public funding and/or by trusts, with occasional operation by private sector organisations. It should be noted, however, that some visitor centres operate as or in conjunction with visitor attractions, and thus the two can be difficult to separate.

exists for a wildlife-based attraction within such a landscape has been demonstrated during visitor surveys within this research. Wildlife was given as the main reason in influencing decisions to visit (Graph 34), with the landscape regularly presented in a positive manner (Table 33, Table 108, and section 4.1.8.3.). The lack of focus on visitor attractions and their marketing within the Humberhead Levels gives the impression that there is little reason for visitors to come.

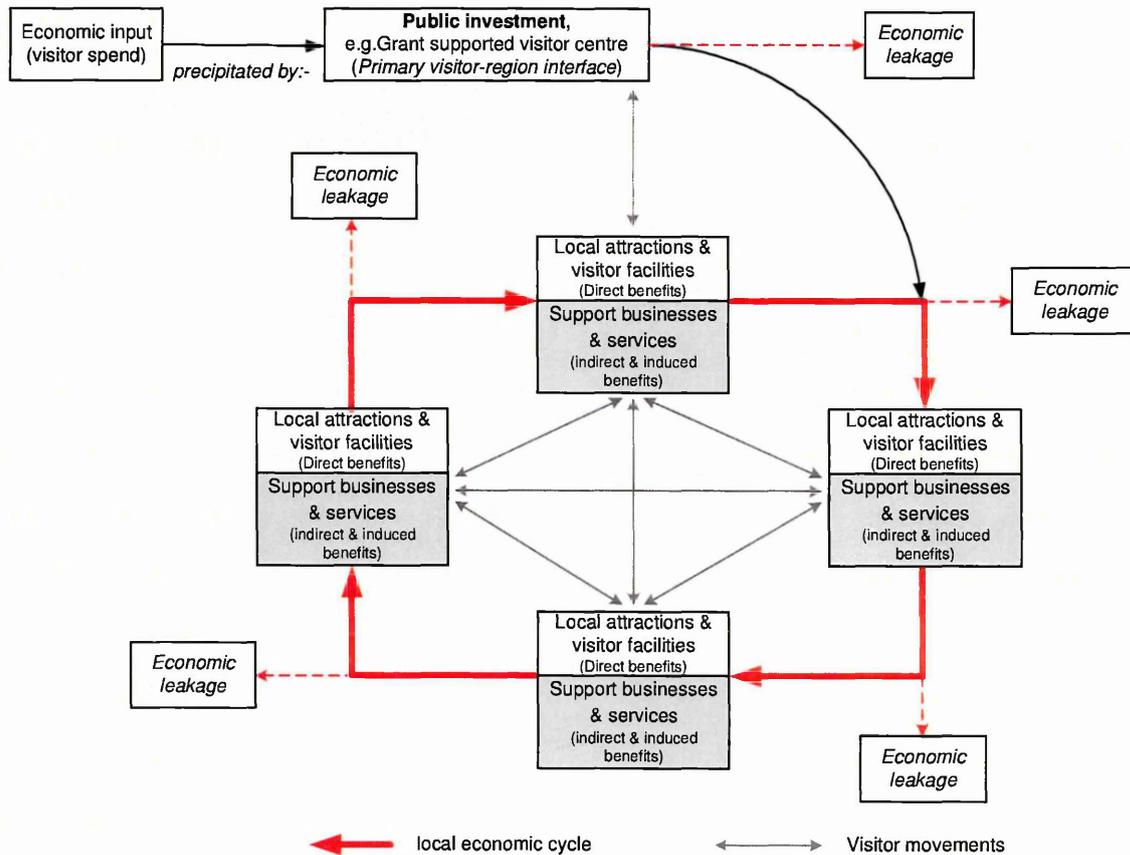


Figure 24: Links between grant-supported visitor centre and the local economy.

There is no guarantee that such a grant-supported visitor centre would ever succeed in being self-supporting. However, as a conduit encouraging visitors into the Humberhead Levels, such a centre could instigate income generation within the local economy greater than its operating costs. Whilst this 'loss leader' approach could place a financial burden on supporting authorities or agencies (Frederick, 1993, in Fleischer and Felsenstien, 2000), it has been adopted by Local Authorities due to the wider economic benefits generated (Rotherham *et al.*, 2004b; Rotherham *et al.*, 2005a).

6.0.13.1. The potential, beneficial contributions of a visitor centre.

As well as the potential for a visitor centre to encourage exploration of a region, such centres also have an economic input of their own right. In economic terms public funds used to establish and operate a visitor centre require off-setting against any income generated. Nonetheless, economic benefits from the visitor centre can be accrued. Noted as modest by the Countryside Agency (2000a), such impacts typically include local employment and small-scale purchase of local products. Whilst difficulties in maintaining the viability of visitor centres is noted, increased economic benefit can also be accrued by the establishment of associated business adjacent to the visitor centre (Countryside Agency, 2000a), much in the manner of clusters discussed in section 6.0.8. Such an observation is also noted by Rotherham *et al.* (2002a) with respect to proposed visitor centre development at Potteric Carr Nature Reserve, Doncaster.

6.0.13.1i. Increasing the visitor centre profile: combined visitor centre-attraction approach.

'Visitor centre' has been defined as within Countryside Agency (2000a); a centre for the dissemination of information on the local area and attractions within it. There is provision and opportunity for such visitor centres to be positioned alongside or within visitor attractions, (Countryside Agency, 2000a), and noted with respect to development at Potteric Carr Nature Reserve. Such visitor centres could be publicly funded, or, being placed within the domain of a privately operated visitor attraction, publicly supported and assisted through agreement with private organisations. As such, the development of a combined visitor centre-attraction resembles the often public-private partnership approach of flagship attractions discussed earlier within sections 6.0.2. and 6.0.3. However, such associations do not automatically equate to large, flagship developments. Small, lower-key attractions funded through public-private partnerships may also contribute to local economies, at less financial risk than similarly funded, large-scale attractions. As such, differing examples of potential levels of visitor centre development are presented within Figure 25.

As examples of combining visitor centres with attractions, several visitor centres operate within the boundaries of visitor attractions within the Somerset Levels and

Moors, and are detailed on the Somerset Levels and Moors Partnership website¹⁶.

Whilst the precise details of funding and operation are unknown, nonetheless, the examples detailed within Table 102 offer an indication of the potential for a similar approach within the Humberhead Levels.

| Visitor centre | Location | Description | Admission charge | Facilities |
|---|-------------------|---|---|---|
| Glastonbury Tribunal - Glastonbury Lake Village Museum | Glastonbury | Museum displaying artefacts and information on life within the region | £2.00/£1.00 | Parking, tourist information, gift shop |
| Langport & River Parrett Trail Visitor Centre/Bow Bridge Cycles | Langport | Visitor centre with displays on past life within the South Somerset Moors, & cycle hire | Free | Parking, toilets, cycle hire, sales & repairs. Free information pack |
| Peat Moors Centre | Westhay | Reconstruction of an Iron Age roundhouse 'village' within the Somerset Levels, including trackways, offering activities including tours, pottery, spinning & dying, metalworking. Also educational and experimental archaeological work | £2.95/£2.45 | Parking, toilets, gift shop, adjacent to privately run café, craft & garden centre, and neighbouring Shapwick Heath nature reserve (English Nature NNR) |
| Willows & Wetlands Visitor Centre/P. H. Coate & Son | Stoke St. Gregory | Working willow producing enterprise, with displays of willow growing, basket making and traditional life within the area. Includes RSPB displays of wildlife and wading birds | Free entry to exhibition. Tours: £2.50/£1.25 | Parking, shop, willow products for sale, toilets, tea rooms, walks |

Source: http://somersetlevels.com/visitor_centres.php

Table 102; Examples of combined visitor centre-attractions within the Somerset Levels and Moors.

Further to the examples detailed within Table 102, Flag Fen, on the outskirts of Peterborough, also offers a range of facilities for visitors, including information on the wider Fen region. So does the National Trust's Wicken Fen. Collaboration between visitor centre-attractions and recreation businesses blurs the differences between the simple distribution of visitor information and the provision of a visitor experience at an attraction. Thus visitor centres present opportunities beyond simply distributing visitor information leaflets, in the manner of many tourism information centres. With respect to developing a visitor market within the Humberhead Levels, combined visitor centre-attractions offer opportunities to generate visitor spend whilst providing information on the wider region.

¹⁶ <http://somersetlevels.com/index.php>

6.0.14. The decision of scale for combined visitor centre-attraction development.

Aiming to increase economic diversity rather than replace existing economies, Figure 25 illustrates levels of visitor centre-attraction development in relation to their costs and opportunities for visitor spend. The opportunity for policy is to identify which point on the attraction curve is the most appropriate for a grant-supported visitor centre within the Humberhead Levels. Such a visitor centre, with realistic expectations of visitor numbers and economic gains, could encourage a visitor market that co-exists alongside the existing agricultural economy.

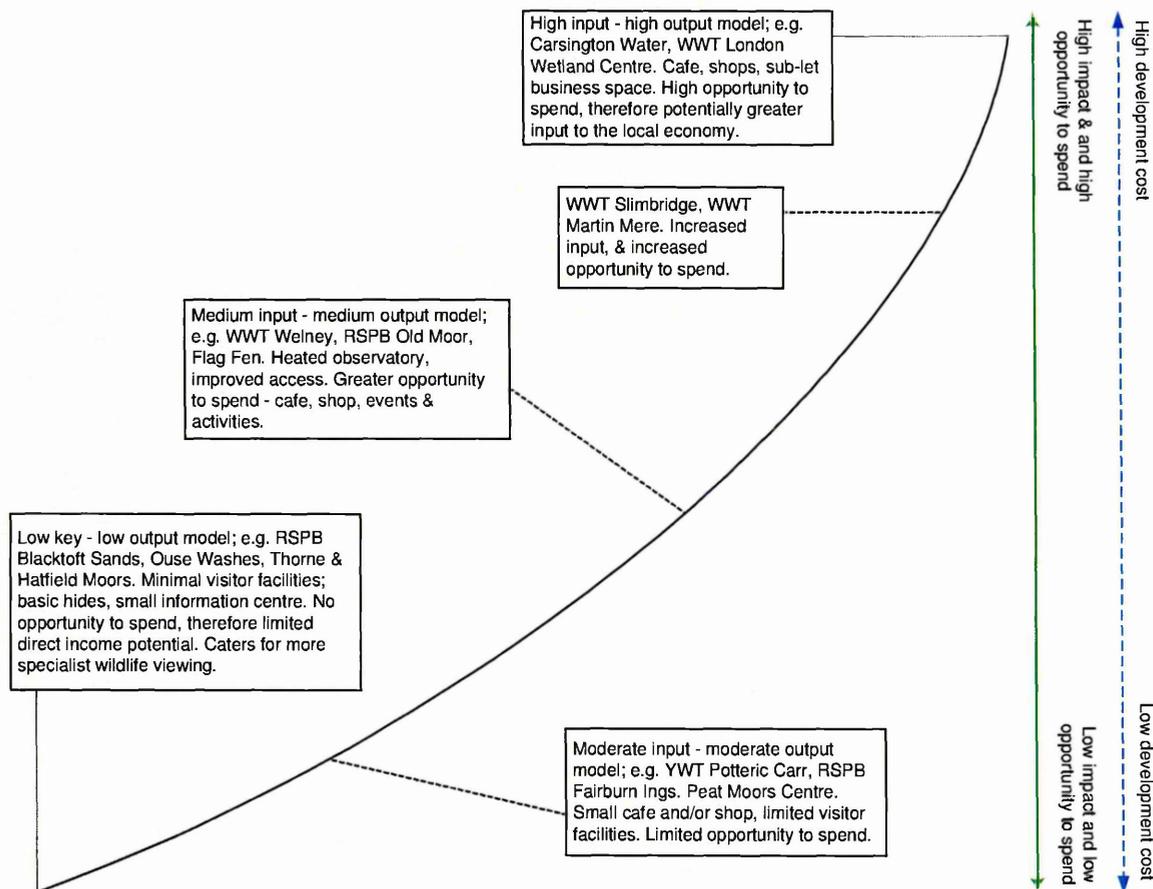


Figure 25: Visitor attraction curve.

The economic and social benefits potentially associated with wildlife-related tourism and nature-based attractions are noted and referred to within the literature (Stucker-Rennicks, 1997; MacLellan, 1999; Rayment *et al.*, 2000; Rayment and Dickie, 2001; Rotherham *et al.* 2002b and 2005b; Herath, 2002; Shafer and Choi, 2005). Such benefits can also be achieved through nature-based attractions encouraging inward investment (Rotherham *et al.*, 2002a), an important factor in its own right. However, the

encouragement of visitor spend is likely to have a more rapid impact through the immediacy of the financial transaction, i.e. visitor spend being received directly by recreation businesses, rather than the delayed process of inward investment through development. Consequently, visitor attractions must provide the visitor with the opportunity to spend.

Graph 42 illustrates the daily visitor spend at each of the surveyed, targeted attractions. As noted within section 4.4.14., Graph 42 also illustrates the opportunity to spend. Logically, where there is little opportunity to spend, little is spent. Such attractions include RSPB Blacktoft Sands and the Ouse Washes, and are represented in Figure 25 as low impact, low investment and low spend opportunity attractions, with consequently limited income potential. The alternative, high impact, high spend opportunity approach is that taken by the WWT London Wetland Centre, or Carsington Water, where high investment, high opportunity to spend and high visitor numbers encourage greater economic contributions. Visitors to Carsington Water contribute an estimated £14 million *per annum* to the local economy (Crowe *et al.*, 2002). However, an attraction such as Carsington Water, on the border of the Peak District National Park, is in an enhanced position with respect to visitor numbers to the Peak District, a popular visitor destination. Such an attraction, whilst appealing as a development option, fits more readily into intensive, flagship categories. It is unlikely to succeed within the Humberhead Levels at current visitor numbers.

With the intention of encouraging economic benefits and with limited visitor attractions, market and public awareness, and also limited visitor spend, the development of a grant-supported Humberhead Levels visitor centre more likely to succeed if a medium input - medium output attraction is developed. Greffe (1994) suggests that such economies of scope are preferable to economies of scale, as associated with more high profile, intensive visitor development. Furthermore, visitor demand dictates the scale of an attraction (Crowe *et al.*, 2002). Thus low demand, as currently exists within the Humberhead Levels, suggests a smaller-scale visitor centre and attraction. Such an attraction is represented by WWT Welney, RSPB Old Moor and Flag Fen in Figure 25. Whilst not approaching the potential maximum for return on investment and potential visitor spend of more high profile attractions, the lower-key approach will fit the existing Humberhead Levels visitor market. It will be less dependent on high visitor numbers for success. Such an approach allows room for development at a slow pace,

rather than relying on a rapid increase in visitor numbers. It avoids potential negative consequences for local infrastructure, and the public perception of the Humberhead Levels as a visitor destination when visitors fail to find alternative attractions or visitor facilities. In support of a lower-key approach, Lieper (2004) provides an example of a high investment, high profile Australian visitor attraction that failed through insufficient visitor numbers. It subsequently proved viable when operated on a smaller scale and lower visitor numbers. The objective is to be realistic in visitor numbers attainable, and to understand the visitor market, as Leiper's example failed to do.

6.0.15. The provision of attraction facilities: more important than the attraction?

In adopting a medium input - medium output strategy, a grant-assisted visitor centre will require facilities in order to encourage visitors to spend, such as a café, shop, and potentially special events. Such an approach is adopted by WWT Welney, Flag Fen and RSPB Old Moor. A point of purchase consumption and an experience rather than a commodity, visit duration and visitor party make-up are critical factors in encouraging visitor spend within day-trips. Attractions act as "*conduits*" for spend but not necessarily encouraging spend themselves (Downward and Lumsdon, 2000 & 2003, p.75). Thus it may be the facilities at an attraction that encourage spend, rather than the attraction's *raison d'être*. For some, a trip out and a cup of tea is sufficient, thus an attraction with visitor facilities such as a café will give a greater reason to visit, thereby encouraging spend and economic benefit, but also potentially encouraging further visits within and an exploration of the region. With a suitably equipped visitor centre encouraging visitors into the region, other businesses such as pubs and shops are likely to benefit. They will increase visitor spend opportunities by offering additional attractions within the vicinity, and economic benefit is enhanced.

For all visitor types, the economic contributions of local visitors are also important. With local visitors forming a high proportion of visitors surveyed (section 4.1.3.), and noted as using local nature-based visitor attractions (Rayment *et al.*, 2000; PACEC, 2004; Rotherham *et al.*, 2005b), such contributions should not be ignored. Leiper (2004) notes the importance of local residents as visitors in respect of income generation at visitor attractions, whilst GBA (2005) observe that the majority of the 71.2 million leisure day-trips and associated visitor spend of £963 million within Lincolnshire are

attributable to local residents. Thus the concept of repeat, local visits is highlighted. Furthermore, attractions offer a location for local residents to bring or meet friends, with the 'natural' and often peaceful elements of nature-based attractions noted as important. Thus a social context is added to the economic benefits of attractions (Rotherham *et al.*, 2002a). Such local use, and the use of attraction facilities outside of the attraction's primary reason for development, is demonstrated by the use of 'Gannets' Café at RSPB Old Moor as a meeting place for local cycling groups. South Yorkshire and North Derbyshire Cyclists Touring Club voted the café as runner-up out of forty-five nominated cafés used by the club (The Star, 23/3/2005). Similar use was also noted during data collection at WWT Welney. These examples not only illustrates the importance of good facilities at attractions, but also of the potential to attract a range of visitor markets other than the primary, targeted market, principally birdwatchers in the case of RSPB reserves.

That the *raison d'être* of a visitor centre may be less important than the facilities it offers in attracting visitors, and that those facilities may encourage a wide range of visitors less interested in the visitor centre itself, presents opportunities for policy to encourage the most expedient type of visitor (Downward and Lumsdon, 2003). Greffe (1994) observes that visitor expenditure should be aimed for, rather than outright visitor numbers. In a similar vein, Downward and Lumsdon, (2003) suggest that, for rural areas, visitor economies should concentrate on more affluent visitors, and aim for longer stays. Visitor spend is positively associated with visitor income. However, the daily spend of visitors identified by this research is comparatively low, at £7.39 (Table 68), with low visitor demand. Thus, whilst targeting affluent visitors may be preferable and logical, without facilities to receive such visitors, in the first instance targeting those markets known to exist, regardless of affluence, may prove most beneficial. Such markets include, as identified, bird watchers, walkers, cyclists, and to some extent, pleasure boats. In building on these and similar identified markets, the opportunity exists to encourage a greater, more mainstream visitor market, with increased economic benefits.

6.0.16. Farming and the landscape: the backdrop to visitor enjoyment.

Critical to visitors' enjoyment is the landscape upon which recreation and leisure activities take place. Further to this is the ability of the landscape to provide refuge and habitat for flora and fauna which visitors come to see. The importance of flora and fauna to visitors was expected prior to data collection surveys, primarily through previous research and literature (Rayment *et al.*, 2000; Rotherham *et al.*, 2002a and 2002b). Whilst more hilly and mountainous landscapes were generally known to be attractive to visitors, the liking for the flat, level landscapes of the Humberhead Levels and Fens was greater than expected (section 4.2.2.). Such a finding is an important facet within the research, as it is at odds with much of the perceived 'wisdom' regarding the public's preferences for landscape types.

Discussed in section 4.2.0. in the context of landscape preferences, the intensive, heavily farmed landscape as a backdrop to an extensive visitor sector based on nature-based recreation and leisure presents an incongruous picture. Noted as 'natural', 'remote' and 'wild' in visitor questionnaire responses (Table 106, Table 108, Table 114), in reality, the landscape is anything but natural or wild, whilst remote is open to subjective interpretation. Towns, villages and roads are never far away. Nonetheless, such descriptors present a marketing opportunity within the tourism cycle, Figure 16, and the importance of the landscape requires further consideration.

The intensive agricultural backdrop is a result of the Humberhead Levels being one of the UK's most productive and intensively farmed landscapes (Steadman, 2003). Within this highly productive agricultural landscape, there is opportunity to generate an agricultural income without the need to resort to secondary income sources. This depends on sufficient acreages and crop values, subsidies where appropriate, and relevant business expertise. However, for those landowners who choose otherwise, or are on less favourable land with lower acreages or insufficient capital with which to expand agriculture, secondary income sources present an opportunity to boost income levels. This is particularly so in a depressed agricultural economy. As the volume of farm-based tourism literature shows, for many, secondary diversification income takes the form of visitor facilities and attractions (Busby and Rendle, 2000; Walford, 2001; Nilsson, 2002), and as such, noted by this research (sections 5.2.2. and 5.3.1.) and also

referred to within the literature, income derived from tourism activities can be important in maintaining farm viability, (Busby and Rendle, 2000; DARD, 2001; Nilsson, 2002).

The implications for the wider management of the landscape of less viable farms becoming insolvent are reflected in the literature. This suggests that such a situation could lead to an increase in farm holding acreage as a means of increasing economies of scale. Whilst some farmers may reduce costs by adopting methods of extensification, thus potentially benefiting wildlife, others may adopt a more intensive approach (Mills *et al.*, 2000; Countryside Agency, 2001d), with consequences for the wider environment, wildlife and landscape aesthetics. This in turn could impact negatively on the visitor market, reducing visitor numbers and so income, with modern agricultural landscapes known to be displeasing to many people (Kaltenborn and Bjerke, 2002). Successful, visitor-related farm-based businesses tend to be situated in aesthetically pleasant rural locations (Walford, 2001). However, with respect to the available landscape resource, larger agricultural holdings may have land and assets to spare that could be used for wildlife and therefore visitor benefit (Walston, 2005; *Survey data*). Further to this, McNally (2001) reiterates observations from several authors that diversification of all types is more likely on larger farms as they are more able to release assets for other activities, including recreation, with an emphasis on arable farms, predominant within the Humberhead Levels, over livestock farms. This observation regarding larger farms and diversification is similarly noted by Walford, (2001) and Nilsson (2001, p.15), who further notes that farm tourism occurs on very small farms "*where agriculture has almost no economic impact*".

In this respect, therefore, in considering the wildlife resource upon which nature-based leisure and recreation depends, where appropriate it is important that farms are encouraged to operate in an extensive, environmentally beneficial manner. This is either through financial support regimes, or through encouraging the creation of alternative forms of income, such as nature-based recreation and leisure. In a social context, extensive, labour intensive farms, by dint of increased numbers of employees and their families within a given area, could have a greater social benefit through increased populations, employment opportunities, and demands for local services. Thus benefits are greater than just environmental and visitor-related. An increase in larger, increasingly mechanised farms is liable to precipitate further out-migration due to less employment demand, to social and economic detriment. Such out-migration has

potential to negatively impact on communities, with reduced demand for services such as schools, shops and pubs, thus reducing community social capital. Potential scenarios related to an intensification of agricultural activities and visitor-subsidised extensification are outlined in Figure 26. As such, Figure 26 models potential outcomes of considering the landscape as a strictly agricultural resource and factor of production. In reality, the landscape has a propensity to be a resource of multiple, mutually beneficial uses. In this respect, Figure 26 illustrates the potentially more sustainable management of the landscape and the environmental resource through the adoption of a multiple economic sector approach. A recreation and leisure market benefits from and supports a predominant but extensive agricultural economy, with associated benefits for employment diversity and community viability.

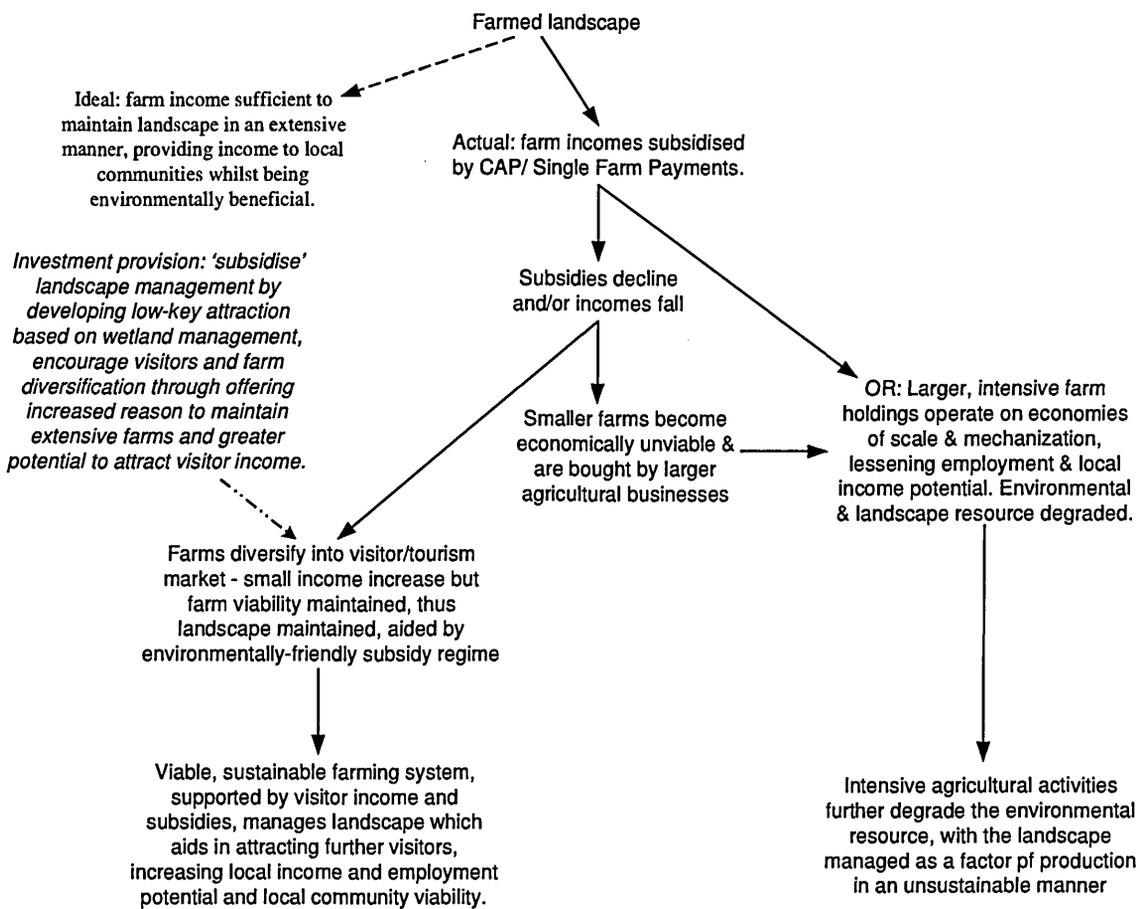


Figure 26: Alternative approaches to land use and farm support.

6.0.17. Farmers, landowners and visitors as managers of the landscape.

As an alternative to being predominantly food producers, as "*care-taker of the rural*" (Nilsson, 2001, p.11), farmers in general are an important component in the visitor market, representing as they do the mainstay of rural production and sustainable rural communities, being the "*critical mass of the region*", according to Lordkipanidze *et al.*, (2005. p.794). As such, support for agriculture in effect supports the visitor market (Fleischer and Tchetchik, 2005). As land managers, farmers have the ability to be instrumental in attracting visitors, to the greater social and economic benefit of the region. Therefore, farmers as purveyors of recreational and leisure facilities, including the wider landscape, have the opportunity to not only advertise their own visitor product, but also the wider region in which they live (Walford, 2001), therefore generating positive externalities for the regional economy (Fleischer and Tchetchik, 2005), agricultural and non-agricultural (Carter, 1999). Whilst the more economically secure farms may be less concerned with diversifying into the recreation and visitor market, for farms with less stable incomes or looking for ways in which to keep the farm within the family, as observed through this research (section 5.3.2.2., Table 95 and Table 96), and by Walford (2001), such opportunities offer an element of security and reduced risk.

As noted and discussed in sections 5.2.0. and 5.3.1., visitor income is seen as vitally important for many of the farm-based recreation businesses surveyed. With supporting data detailed in section 5.1.3., farmers' responses concerning their visitor based income include:

"Visitor income helps a lot"

"As farming doesn't pay, B&B.....is a good source of income"

"Have to move if lost this (visitor) income"

"Not making any money in farming"

with comments on the loss of that income including:

"Go bankrupt"

"Probably couldn't live here"

"Go bust!"

"We would have to sell the farm".

The value of visitor income with respect to the maintenance of farms, farming lifestyles and therefore the local community and landscape seems to be greater than the limited monetary value placed on visitor income from diversified farms, (Roberts, 2002; Nilsson, 2002; DEFRA 2004 and 2005a). Whilst the benefits of diversified and visitor-related income is noted (Busby and Rendle, 2000; CRR, 2003), there seems to be an implication that for many diversified farms, the effort involved is not worth the while. The literature details a lack of profit made (McNally, 2001; Nilsson, 2002; DEFRA, 2004). This research suggests that this is not so. Income from visitors provides vital support for the overall farm business, as a means of survival and viability as similarly noted by Meert *et al.*, (2005) and Busby and Rendle, (2000). Visitor income, therefore, makes important contributions to farm incomes and local economies (Slee *et al.*, 1996, in Nilsson, 2002), providing vital input to the maintenance of the landscape and nature-based resource, and therefore social and community benefits (Figure 27).

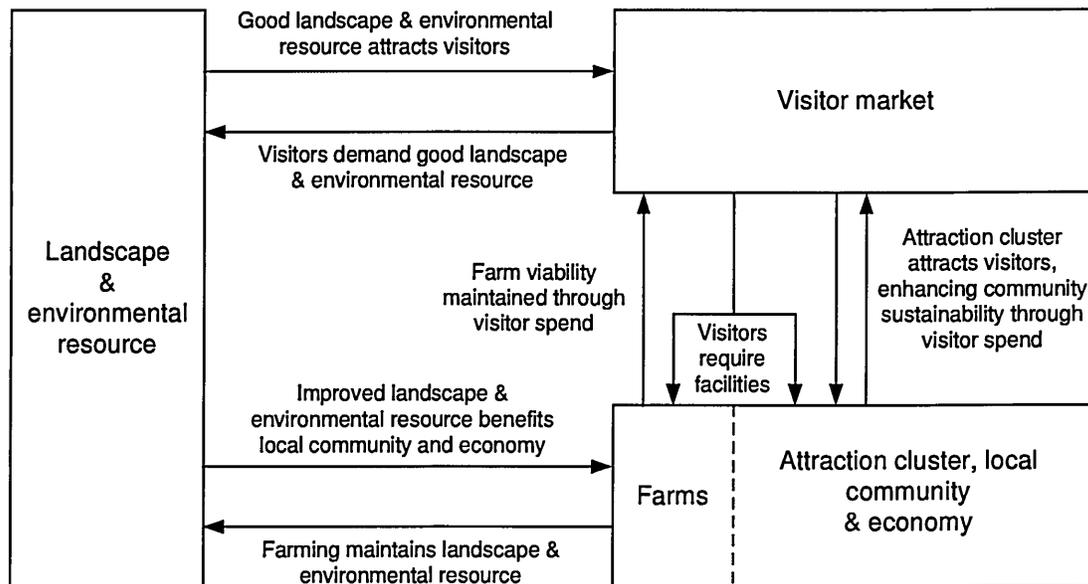


Figure 27: Farm, landscape and visitor cycle.

6.0.17.1. The contributions of non-farm land managers.

Farmers are only one group of numerous land managers. Within the Humberhead Levels, considerable areas of land are owned and managed by the Environment Agency, English Nature, local Wildlife Trusts, the RSPB, and Local Authorities. There is therefore the potential for a co-operative approach between land managers to enhance the landscape and the wildlife resource, and attract visitors. Whilst co-operation

between Local Authorities is noted with respect to visitor management and marketing the region (*Survey data*), such co-operation is less concerned with managing the landscape as a visitor resource, although the resource is recognised and valued. With much of this land managed for its wildlife value, and English Nature are establishing a visitor centre of a yet undecided type or location within the Humberhead Levels, in partnership with the Countryside Agency and North Lincolnshire Council (*Survey data*), the potential for nature-based recreation and leisure within the region is enhanced.

6.0.18. Nature-based recreation and leisure: a small-scale and effective economic opportunity.

The Humberhead Levels, whilst under-developed in visitor demand, has many facets suitable for the development of nature-based recreation and leisure (Bowles and Green, 2001; Rotherham *et al.*, 2002b; SDC, 2004). However, also identified by this research and Rotherham *et al.* (2002b) is the likelihood that although numerous niche markets exist around activities such as bird watching, walking, fishing and cycling, visitor demand is likely to be small. Thus associated businesses are likely to be small. An observation also noted by Lordkipanidze *et al.* (2005), and Hall and Boyd (2005) with respect to peripheral areas: nature-based tourism is often very small-scale. Regardless of the scale of nature-based recreation, leisure or indeed, tourism, of importance is that the research has identified the propensity for nature-based attractions to act as catalysts in attracting visitors into the case study regions (section 4.1.11.). This may encourage visitor spend. As such, the case study regions gain increased exposure within the public conscience, and there is therefore the potential for fen landscapes to receive greater public appreciation through association with nature-based recreation. They may become visitor destinations in their own right. Whilst fenlands may never gain the popularity of landscapes such as the Lake District, (section 2.5.1.), nonetheless, the research has identified a liking for them, (sections 4.1.13. to 4.1.16.). This is opportunity to be capitalised on.

The Humberhead Levels, whilst not necessarily peripheral in terms of location with respect to urban areas and major transport links, i.e. the M18, M180 and M62, are peripheral in terms of the public consciousness as a visitor destination. The small-scale observations noted above with respect to the size of nature-based recreation enterprises are borne out by the visitor figures obtained during data collection in the Fens. Visitor

figures are generally low. Further to this, the theoretical income generated from visitors, at a mean of £7.39 per day (Table 68), will correspondingly produce limited economic benefits in line with low visitor numbers. However, as noted above, regardless of the low level of income generated, whether farm-based or not, visitor spend is important to local economies, with Lordkipanidze *et al.*, (2005) noting that small-scale tourism businesses contribute to the sustainability of rural economies through economic diversification, support of local identities and culture, and help maintain rural populations. Thus, a critical finding of the research is that, although limited in demand, and likely to remain relatively low-key, nature-based recreation has potential to contribute in a small but significant manner to rural economies of limited income and employment diversity. This significance is not in a strict and straight forward, business viability and profit sense, but rather in the manner in which nature-based recreation and leisure can contribute overall to the wellbeing of the environmental resource, income diversity and therefore sustainability of rural communities (Lordkipanidze *et al.*, 2005). In as much as a small visitor-based income has been shown to be vital to the viability of farms, similar levels of income may also be vital in the maintenance of local services such as pubs, shops and schools. Such local services create a social benefit for communities beyond strict economic parameters that are difficult to substantiate, but nonetheless are the difference between a viable community with a social capital, and a community haemorrhaging the same through lack of opportunity and investment. Therefore, in enabling a diversification of income potential, nature-based recreation has potential to encourage an extensification of agricultural activities, improve the environmental and social resource, increase employment variety, and in respect of the Humberhead Levels, offer an alternative visitor destination as yet undeveloped. As Hall and Boyd (2005, p.10) suggest, nature-based tourism may be small-scale and fail to meet policy and politicians expectations, thus questioning their realism, but its impact on a local level can be significant,

"allowing population and lifestyle maintenance and possibly even a small amount of growth, although not the dramatic improvements that many regions and their politicians seek".

Thus in the interdependent, symbiotic relationship noted by Roberts (2002), nature-based recreation and leisure, farming and visitor facilities, in conjunction with

Government and NGO land managers, have a greater potential to stimulate local economic activity, and so rural community sustainability.

6.0.19. Limitations of the Research.

With the research findings and discussion presented above, considerations must also be given to the limitations of the research. As with many studies, issues of time and costs present constraints on what can be achieved. With such factors acknowledged, and the limitations with respect to the sampling strategy and representativeness noted in section 3.4.5 and on, issues of questionnaire design, distribution and return rates require consideration.

With issues of sample sizes and questionnaire return rates noted, both as percentages and actual numerical values, in sections 3.5.1.3 and 5.0.2, the sample sizes obtained nonetheless compare with similar studies, as detailed in sections 3.5.1.3. and 5.2.5. However, with the numerical values of recreation business surveyed and with the return rate on some visitor questionnaires being low, particularly the general questionnaires distributed within the Humberhead Levels and Somerset Levels and Moors, there are issues related to data collected. In particular this is in comparison with the greater visitor questionnaire return rate from targeted visitor attractions. Such differences potentially bias data with respect to visitors to targeted, principally wildlife attractions, compared to more generic, non-specific visitors. Whilst such an approach has illustrated the importance of targeted attractions and wildlife to the case study areas, the issue of obtaining limited data from less specific fenland-based attractions should be noted and could be improved upon.

With respect to the questionnaire design for visitors and recreation businesses (Appendix Three), whilst useful data was collected, further refining of the questionnaires post-pilot test may have elicited a greater return rate. In particular, the recreation business questionnaire, whilst achieving a response rate of 29.5%, nonetheless requires simplification. The complex appearance and detail of questions asked may be a factor in the number of questionnaires returned.

Further to visitor questionnaires, the lowest spend category detailed within question 15, at 'up to £20', requires consideration. With the visitor spend categories based around the GB Day Visits Survey average UK daily tourism spend of £27.70 (Anon., 2004), the 'up to £20' category was deemed appropriate as a minimum spend category. However, whilst daily spend data obtained from visitors was identified as being comparable with similar studies, Table 70, lower spend categories, i.e. up to £5 or £10 categories, would have provided greater certainty to the visitor spend data obtained, in comparison to other studies. This limitation is discussed further in section 4.4.11.

In conjunction with daily visitor spend values and visitor questionnaire spend categories, is the issue of free entry for members of and to attractions operated by organisations such as the National Trust, the RSPB and the Wildfowl and Wetlands Trust. As discussed in section 4.4.12.1, free entry for members can theoretically reduce potential income at visitor attractions, with the research noting the often high proportions of non-paying members visiting attractions. With visitor data collected at attractions operated by the above organisations, this also has clear implications for the value of daily visitor spend identified; no entry fee reduces daily visitor spend. As such, and with the scale of 'lost' admission fees and their impact on daily visitor spend more fully understood as a result of the research, the lowest 'up to £20' category within the visitor questionnaire does not allow for the affects of non-paying membership visits on daily spend data. Lower spend categories would have allowed for this, again providing more certainty to the visitor spend data collected.

The above considerations are noted, and the research findings viewed accordingly. The discussion and conclusions, based as they are on the data and results presented, nonetheless represent an accurate and considered culmination of the research processes undertaken. Future research will benefit from the above factors being taken into account. The current research, open to improvement as it is, nonetheless presents important findings with respect to the potential for nature-based recreation and leisure to contribute positively to rural, fenland economies.

6.0.20. Conclusion.

With the importance of low levels of recreation-based income and the overall visitor profile identified, the development of a low-level visitor market constructed around nature-based recreation and leisure as a potential instigator of economic and income diversification within the Humberhead Levels is presented. Although income associated with nature-based recreation and leisure is noted as low, nonetheless, there is considerable potential for it and associated business opportunities to operate alongside the predominant agricultural sector of the region. Employment opportunities are potentially increased, with demands for local services. This is in part through visitor demand, but also through demand from recreation business employees living within the locality of their employment. Through this, the viability of local communities is likely to be increased and maintained. Thus the importance of visitor-related income is enhanced relative to its apparent insignificance in financial terms as accrued through visitor spend.

In noting that small, niche markets and predominantly day-visitors comprise the target visitor market, small, low-key development is considered most appropriate as a means of stimulating a visitor market. Whilst large, flagship attractions have appeal, they also rely on high volumes of visitors. With visitor numbers likely to be low in the first instance, the financial consequences of developing a flagship attraction, which may then fail due to insufficient visitor numbers, suggest such a development would be inappropriate for the Humberhead Levels. Further to this, small, low-key visitor development is likely to be beneficial for the retention of income in the local economy. It also maintains local control of any developing visitor market, with associated benefits for the maintenance of the environmental resource. Should a cluster of attractions and associated businesses develop, such benefits may be enhanced. Furthermore, with farmers as land managers being instrumental in the maintenance of the landscape, and as receptors of important contributions from visitors with respect to maintaining farm viability, there are implications for policy. Identified during the research these include considerations of rural visitor development as an income source, and linking visitor development to the wider agricultural landscape and economy. With an understanding of the necessity of a tourism system identified in order to capitalise on the benefits of visitors, the holistic approach required of policy is paramount in capitalising on the identified low but important visitor demand. As such, and within the context of the

research framework (Figure 4), Chapter Seven presents the research conclusions and recommendations.



Photograph 11: Visitors to WWT Welney during afternoon swan feeding.

Chapter Seven: Conclusions and recommendations.

7.0.1. Introduction.

The research is informed by an understanding of the literature, the development of a research framework (Figure 4), and the analysis and discussion of data collected via surveys and interviews. It has identified important elements with respect to developing a nature-based recreation and leisure market within the case study region of the Humberhead Levels. In doing so, it assessed the potential contributions of nature-based recreation as a factor of rural economies, and thus fulfilled the research aim of assessing the relationship between rural economies and nature-based recreation and leisure. The research findings (detailed in the preceding chapters) suggest that nature-based recreation and leisure have potential to contribute in an important manner to rural economies within fen landscapes, i.e. landscapes not traditionally associated with recreation, leisure or tourism markets. As such, the conclusions are presented in the context of the research framework. This was developed and revised through the research process.

7.0.2. A synopsis of the research findings.

The research adopted of a pragmatic approach and used qualitative and supporting quantitative data to assess the potential for nature-based recreation and leisure within rural economies. It identified and provides a greater understanding of the often disguised and hidden links between visitors, visitor facilities, and land managers, particularly farmers, in the context of flat, low-lying, fen landscapes. Informed and supported by data and observations from previous and similar studies (Rayment *et al.*, 2000; Rayment and Dickie, 2001; Rotherham *et al.*, 2002a, 2002b, & 2005b; PACE, 2004), and thus engendered with factors of reliability and validity, the research places great importance on the values beyond monetary benefits from visitor spend. This was based on the case study regions of the Humberhead Levels, the Fens, and the Somerset Levels and Moors. These values are related to the maintenance of the landscape and rural communities. Further to such landscapes, as a critical element in visitor demand, the research identified a visitor appreciation for fen landscapes. This was unexpected,

and consequently of importance in considering the development of a nature-based recreation and leisure market within such landscapes.

Of critical importance to the research findings is the symbiotic relationship between landowners and visitors. In particular, that the spend of visitors enables farmers to maintain the landscape. Without this income, the research has established that many farmers would struggle to survive. Of further, critical note is the finding that visitor income is relatively small in terms of financial value, i.e. in pounds sterling, as noted by various studies (McNally, 2001; Sharpley, 2002a; Roberts, 2002; Nilsson, 2002; DEFRA, 2004 and 2005a), but nonetheless is seen by farmers as vital. Financial returns on investment calculations may question the logic of operating a visitor facility with such minimal returns. The reality is that this minimal return is, in many instances, maintaining the farm as a viable concern. As custodians of the landscape (Roberts, 2002), farmers and other landowners are responsible for the wider environmental resource, and as such, a reduction in their ability to maintain the landscape will impact on that resource, and on any developing visitor market.

Mechanised agriculture potentially employs a reduced workforce within arable regions, (Cranfield University, 1997), the potential but limited extra employment generated by nature-based recreation and leisure echoes the importance of small additions to farm income generated through visitor spend. Although direct employment in such a sparse, industry-free rural region is likely to be dominated by agriculture (Crompton, 1995), the importance of such jobs in maintaining rural communities and services will outweigh its apparent insignificance. Fenlands may generate equal or greater employment to similar agricultural land (PACEC, 2004). Potential employment at a managed fenland attraction such as Wicken Fen may be at a similar employment rate to fenland agriculture (Cranfield University, 1997). The greater benefit of such a visitor attraction is often employment generated by businesses providing visitor support services. The importance of a nature-based recreation and leisure market is perhaps less for the wildlife, wetlands and associated visitor centres themselves, but more in that they attract visitors to the region as a whole. This is through forming a critical 'attraction mass' with other attractions, thereby spreading economic benefit throughout the region. In this respect, a cluster of smaller attractions is likely to offer greater return, at less financial risk, than a large, stand-alone attraction. Furthermore, such attractions would better fit the identified niche markets of wildlife viewing, walking, fishing, equestrian activities and similar,

with potential for attractions to be tailored to individual niche, visitor markets. Whether or not such visitor centres, wetland or otherwise, would be economically viable in their own right is difficult to determine. However, if they contribute to the maintenance of an aesthetically pleasing and diverse rural environment, thus attracting visitors and visitor spend, their own economic viability is less of an issue. This is in terms of the wider context of maintaining viable, rural communities and a high quality environmental resource: the rural landscape.

With respect to the profile of the visitor market identified, the research demonstrated that this is predominantly a day-visitor market, of 75% day-trip visitors, and many of those considering themselves locals. As a finding of the research such an observation, supported by the increasingly recognised value of day-visitors within more recent literature (Flognfeldt, 1999; Downward and Lumsdon, 2000; Shibli, 2004; Continuum, 2004; Bryan *et al.*, 2004; GBA, 2005), has implications for assessing the economic impacts of visitors, and thus the potential benefits to be gained. In respect to tourism economics and the inputs of visitors, the research is therefore less bound by the limitations ascribed to tourism and the assessment of tourism economic impacts. This is both in an academic and practitioner, tourism industry sense. In this respect, issues associated with defining tourism and tourists, such as distances travelled, overnight stays and regular visits, are disregarded. Economic impacts from visitor spend can thus be considered in their fullest extent, rather than in a selective manner. The norm has been of paying less regard to local and day-visitor spend. Through this, the research has indicated a low but important level of visitor spend, in line with that of similar studies (Table 69 and Table 70). As with the low visitor income obtained by landowners, the research indicates that the collective value of visitor spend in terms of maintaining local communities exceeds the obvious value as through direct financial returns. This raises important considerations for the sustainability of local economies.

The identified visitor market is predominantly a day-visitor one. Nonetheless, the 25% of staying visitors represent an important component, even allowing for the high proportion, 40% of all staying visitors, who stay with family and friends. With the spend of one overnight staying visitor approximately equating to the spend of three day-visitors, the value of staying overnight staying visitors is clearly enhanced. However, in considering the development and marketing the Humberhead Levels, the lack of accommodation stock and staying visitors suggests that the day-visitor market should

predominate in initial visitor development and marketing. It should be noted that an overly-stressed day-visitor policy could ignore the greater spend per visitor of staying visitors. It would not encourage the growth of a staying visitor market. Accommodation providers were the predominant sector responding to the recreation business survey in the Fens. Farms were noted as diversifying into accommodation provision (DEFRA, 2004). Accommodation, in terms of providing space for camping and caravan sites or converting redundant buildings, is an important and relatively easy visitor facility to provide, and thus has potential to be an important input to local economies, particularly with respect to developing a long-term visitor market.

The research identifies a visitor demand within traditionally less popular landscapes such as the Fens, as compared to visitor demand in more mainstream, coastal and upland landscapes. Visitors contribute to the maintenance of such landscapes. Whilst visitor demand, and therefore visitor spend, is currently identified as low-key and is also likely to remain so in the future, with niche visitor markets related to wetland and wildlife attractions, the research notes opportunities for nature-based visitor markets to compliment the existing agricultural base. Through this, the research indicates a low level but important economic contribution from such visitor attractions. This contributes to local economies and local communities in a way that exceeds their apparent financial worth. Thus, whilst the agricultural base within the intensively farmed landscapes of the Humberhead Levels and Fens will remain the primary income generator for the foreseeable future, nature-based recreation and leisure visitor markets have potential to provide alternative, diverse income and employment sources for communities living within those regions. Within this, market prices for arable produce are likely to remain the predominant factors dictating land use within the Humberhead Levels and Fen region. With changes in CAP subsidy regimes and potential flood defence works undertaken by the Environment Agency, and with policy encouragement and changes in agricultural support, wetland-based nature-based recreation and leisure offer alternative income sources. This is particularly so for landowners on less favourable land, and those looking to diversify their agricultural interests. As such, nature-based recreation and leisure has potential to support and help maintain the viability of rural communities within fenland landscapes in association with the predominant agricultural economy in a symbiotic, mutually beneficial manner.

7.0.3. The research findings within the context of the research framework.

With reference to the research framework presented within Chapter Two (Figure 4), the framework detailed in Figure 28 represents that framework as developed and revised with respect to the research findings and conclusions. Requiring interpretation within the context of the discussion and data analysis, Figure 28 illustrates key observations resulting from the research, and indicates opportunities and concerns regarding the instigation of a nature-based recreation and leisure visitor market. With the findings and conclusions noted within Figure 28 with respect to the Boxes One to Four, the contents of each box as research findings are presented below.

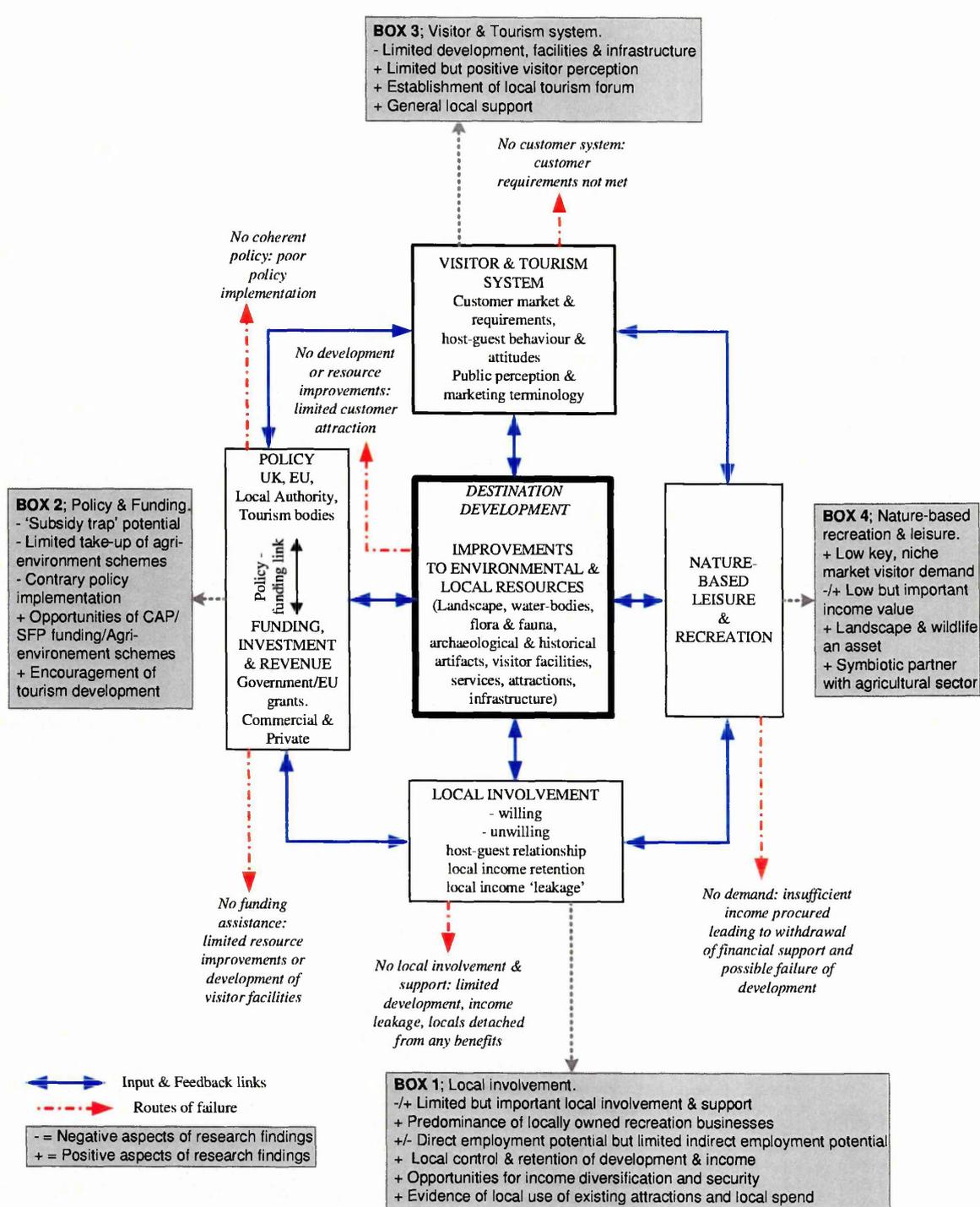


Figure 28: Research findings as developed from the research framework.

7.0.3.1. Box 1: Local involvement.

The research identified that whilst of low-key and modest economic importance within the case study regions, local involvement within the context of nature-based recreation and leisure is an important facet within local communities. Box 1 provides an abridged list of the more important findings with respect to local involvement.

- Limited but important local involvement.
- General support indicated for tourism/visitor development.
- Predominance of local, small-scale family businesses involved within the visitor market.
- Economic benefits spread through local communities through predominantly direct employment.
- Indirect and induced employment benefits reduced due to sparse nature of population settlement, but nonetheless an important contribution.
- Currently, visitor numbers low, so tourism *per se* is not an overbearing issue, and conflicts few.

Box 1: Local involvement.

Many of the recreation businesses surveyed were family owned and operated. As noted in the literature on rural, visitor-related businesses (Fleischer and Felenstein, 2000; Rilla, 2004), not only is local involvement central to the current visitor market, but visitor income is retained within local communities. Within this context, the research has evidenced that for farm operations diversifying into visitor enterprises, this not only brings in much needed revenue, but also enables family members to be employed within the wider, diversified business portfolio. In some instances it allows the farm to remain within the family. For visitor attractions operated by national organisations such as the Wildfowl and Wetlands Trust and National Trust, local employment opportunities are not only increased in number and variety, but they can be the largest employer in the area. With respect to Wicken Fen, visitors are critical to maintaining staff employment levels (PACEC, 2004). Visitor attractions of this nature are beneficial to local communities with few employment prospects. This is not only through income and employment generation, but also in limiting potential outward migration of employment-seekers. Such prospects are enhanced by the indirect and induced employment associated with visitor attractions. Such employment may be comparatively low in the immediate vicinity of an attraction. This is in part due to the often sparse nature of settlement in the case study regions necessitating employees and supplies being drawn from neighbouring areas. Nonetheless, such employment is of benefit to the wider case study region and economy.

With recreation businesses noted as predominantly local owned, with high usage by local people, it is unsurprising that there is local support for the development of a visitor market. Whilst reservations are noted concerning potentially high numbers of visitors and inappropriate development, the research suggests that with low-key development and small-scale visitor attractions, this scenario is unlikely.

7.0.3.2. Box 2: Policy and funding issues.

Box 2 highlights issues related to policy and funding identified during the research. Policy support is in evidence within the case study region, with collaboration of Local Authorities and wider support, funding and advice from Government agencies, but the research highlighted some concerns.

- Changes in agricultural policy (CAP - Single Farm Payment) and water management (Water Framework Directive) encourage more holistic land management approach, with potential environmental benefits.
- Opportunity for environmental improvements supported by agri-environment schemes.
- Support and encouragement from rural development agencies for rural tourism.
- Establishment of the Green Tourism Forum and Humberhead Levels and Moors Partnership.
- Concerns of policy change reducing subsidy levels and instigating a 'subsidy trap' for landowners.
- Potentially limited take-up of agri-environment schemes in arable regions, e.g. Humberhead Levels.
- Lack of coherent policy highlighted between departments (e.g. development agencies, Highways Agency and planning departments), thus affecting visitor market development.

Box 2: Policy and funding.

With agricultural subsidies, changes in the agricultural support regimes have introduced an element of uncertainty for many landowners regarding subsidy payments. Much of the agricultural community is in a state of flux over incomes. The research identified important concerns regarding potential constraints associated with subsidy payments. Of note is that landowners could find themselves trapped within falling subsidy payments and land out of profitable production as a result of protective designations (e.g. SSSIs). These might be placed on land that contains protected species following landowners' entry into agri-environment schemes. This was also noted by Hodge (2001). Thus income current and future is lost through the protection of non-productive land. Whilst this is of concern for wider policy, as critical factors in landscape management, issues that prevent landowners from earning sufficient income from their land holdings are important. They could impact negatively on any nature-based recreation and leisure market. Such a situation reduces incentives to manage land in a manner beneficial for wildlife. This may adversely affect any embryonic nature-based recreation and leisure market. Without clear, consistent, and long-term financial returns from agri-environment schemes, landowners with productive land have little incentive to enter them. The Humberhead Levels is highly productive and mostly arable land, with limited scope for the adoption of agri-environment schemes (Hawke and Kovaleva,

1998). Market forces are predominant factors in crop production and land management, and issues of entry into agri-environment schemes for environmental and wildlife benefit are heightened.

Other policy issues include inconsistent approaches to the visitor market and problems such as planning permissions. Often associated with Local Authority policy, approaches to planning permission for building conversion and development differ. The Highways Agency has inconsistent use of brown tourism road-signs. This not only presents an incoherent image to visitors, but also reduces potential within the visitor market. It creates a division between those involved within the visitor market as developers and facility providers, and policy instigators and implementers. Opportunities can be wasted. There is much support for the establishment of a visitor market within the Humberhead Levels at a policy level, and appreciated by those who receive help and guidance. Nonetheless, the differing approaches between often but not solely, public and private factions, is an issue that requires attention. Such difficulties are in part perhaps caused by the multiple Local Authority presence in the Humberhead Levels. Within the Fens, a region also beset by multiple Local Authorities, the establishment of Fens Tourism presents a coherent image to recreation and leisure businesses as a point of contact, and provides the same with respect to visitor information available to the public. Thus the image of the Fens as a visitor destination is enhanced. As such, policy support for the Humberhead Levels and Moors Partnership and the Green Tourism Forum should be encouraged (Box 3).

7.0.3.3. Box 3: Visitor and tourism system.

The lack of a complete and developed tourism system within the Humberhead Levels (Figure 17), was found to be important. For individual recreation businesses, capturing the potentially greater benefits of recreation and leisure on a regional basis may not be vital. However, the development of a tourism system is considered important. In this respect, Box 3 details research findings of importance to the establishment of a visitor and tourism system.

- Identified niche visitor markets within the Humberhead Levels
- Currently limited visitor facilities & infrastructure.
- Limited but positive public perception of fen landscapes indicates potential visitor market to be encouraged.
- Limited public destination knowledge provides opportunity for creating a positive destination image within the Public conscience.
- Establishment of local tourism groups (Green Tourism Forum & Humberhead Levels & Moors Partnership) in conjunction with supporting Government agencies indicate the establishment of a fledgling visitor and tourism system.
- Small-scale visitor centre development is considered appropriate in the first instance.

Box 3: Visitor and tourism system.

With the similar landscapes of the Humberhead Levels, Fens, and Somerset Levels and Moors, there are niche visitor markets to target and encourage. The identified visitor appreciation for fen landscapes suggests the targeting of niche markets such as wildlife viewing, cycling, walking and water-related activities has potential. The lack of public identification of the Humberhead Levels as a visitor destination provides opportunity to create a positive image of the region. This might help create and influence visitor demand by targeting the identified niche visitor markets, and those most likely to visit and contribute to the local economy. Therefore, through the establishment of the planning and marketing aspects of a tourism system, the most economically beneficial visitor markets can be encouraged and planned for. Demand can then be established. The establishment of such niche visit markets lays the foundations for a broader, less specialised visitor market to develop later.

Visitor facilities in the Humberhead Levels and the infrastructure of transport and visitor information are limited. The encouragement of a visitor market based on landscape and wildlife limits the need for additional mainstream visitor facilities in the early stages. Any publicly supported visitor centre envisaged would be more appropriate if established on a small-scale. This lessens development and maintenance costs whilst being more in keeping with the identified low levels of visitors. It also engenders local control of the process. Such a visitor centre has potential to introduce visitors to the Humberhead Levels. It would be a key point for informing visitors about the region, thus helping distribute visitor spend.

With the potential to market the region as quiet, unexplored and relatively free of traffic, the lack of infrastructure, excepting motorways, need not be a hindrance to the

development of a tourism system and visitor market. Although facilities such as cafés and information on attractions to visit are lacking in the Humberhead Levels, the collaboration noted between Local Authorities and at a wider policy level indicates the development of a tourism system. With policy support given to the Humberhead Levels and Moors Partnership and the Green Tourism Forum, Box 2, and to individual recreation businesses, there is clearly an understanding of the potential for recreation and leisure. The importance of potential income generation is highlighted not through direct economic value, but rather through the importance of that income in business survival and land management. Box 4 and the following section detail the critical findings of the research as to the greater benefits of nature-based recreation and leisure.

7.0.3.4. Box 4: Nature-based recreation and leisure.

The potential of nature-based recreation and leisure as factors in rural economic regeneration are illustrated as having hidden importance as contributors to overall rural economies. This shown within the case study regions of the Humberhead Levels, the Fens, and the Somerset Levels and Moors (abridged in Box 4 and in conjunction with Box 1, Box 2, and Box 3, and as also detailed in Figure 28).

- A symbiotic, supporting partner within the agricultural economy.
- Small, low-key but potentially greater visitor demand, with potential for increased niche markets: birdwatching, walking, fishing, cycling, boating, equestrian, archaeology.
- Predominantly day-visitors over overnight staying visitors (75% : 25%), with important use by local visitors.
- Small-scale, low level of visitor income (£7.39 spend per visitor/day), the overall value and importance of which is greater than the financial value suggests.
- Landscape an important and visitor appreciated backdrop for recreation and leisure activities.
- The landscape its self is seen as an important asset, as is the wildlife within the landscape.
- Nature-based attractions are instrumental in attracting visitors into the case study regions, and thus support local communities through visitor spend contributions to local economies.
- Land managers are of critical importance to the maintenance of the landscape.
- Visitors contribute to the management of the landscape through support of land managers via visitor spend.

Box 4: Nature-based recreation and leisure.

Critically important in the research is that whilst income generated through visitor spend is important if low-key, irrespective of the relatively modest financial values, it is significant to the maintenance of the wider landscape. As an income source, visitor

spend is vital to maintaining some farm landholdings. Without this, foreclosure and bankruptcy threaten. Should such a situation occur, it is likely that employment opportunities would decrease within rural communities. Smaller farms and land holdings would amalgamated into larger, potentially more intensively managed land holdings. This would be to the detriment of the wider environmental resource.

As a visitor resource, the research identified the importance of day and local visitors for nature-based recreation and leisure. This is contrary to much of the tourism literature. Whilst overnight staying visitors are of noted importance with respect to spend per visitor, those visitors on day-trips are not only prepared to travel considerable distances, but do so on a regular basis. They often return to the same attraction, particularly with respect to viewing wildlife. In this manner, the presence of nature-based attractions is identified as critical in attracting visitors into the case study regions, and contributing to the maintenance of local economies and communities. This is particularly so with respect to those visitor attractions with increased opportunities for visitor spend, such as cafés and retail outlets. Whilst visitor attractions with low-spend opportunities are important in attracting visitors overall, the research identified enhanced value to local economies. This is particularly so for nature-based attractions with increased visitor spend opportunities.

With potential for repeat visits identified, an element of visitor loyalty to attractions is evidenced. This has consequences for overall visitor income. Although identified visitor numbers are currently low, with collective visitor spend relatively low, at £7.39 per visitor per day, visitors are important for local economies. Farmers, land managers, and businesses relying solely on visitor spend place considerable value on this income. Whilst large, visitor-demanding attractions are often presented as more beneficial to attracting visitor income through high visitor numbers, the research suggests in landscapes such as fenland, small, low-key visitor attractions with low numbers of nature-based recreation and leisure visitors make valuable contributions to local economies. Local communities retain more control of visitor development, and through local employment and associated spend, much of the visitor income is retained in the local economy.

The research identified the importance of niche markets for attracting visitors. Also important from the research and in the literature is that flat, fen landscapes, contrary to

perceived images, are popular, considered attractive, and an asset to the case study regions. Often described in terms more associated to mountainous regions, wild, remote and empty, the research suggests that fen landscapes have much to offer visitors if presented appropriately. The uniqueness of fen landscapes is a key asset, within which activities associated with nature-based recreation and leisure form an important component. With the landscape being in part a reflection of land management, and this being supported by visitor spend, nature-based recreation and leisure have the potential to contribute to its maintenance.

7.0.4. Conclusion.

In conclusion, the research suggests nature-based recreation and leisure present low-key but important opportunities for increased income and employment. This is particularly so within the Humberhead Levels, with the opportunity of building on an existing if low-key and hidden visitor demand. As a low-key contributor, nature-based recreation and leisure have the potential to contribute to the local economy in a symbiotic way. This may be concurrent alongside the existing agricultural economy, as an additional economic input rather than a subsuming and competing economic sector. With existing visitor spend identified as important if not vital to the maintenance of some aspects of land management through farming, an increase in visitor demand and spend through nature-based recreation and leisure will enhance these links. It therefore provides increased opportunity and potential incentive for a less intensive management of the landscape. This is alongside community and social benefits, and associated environmental and wildlife gains.

7.0.5. Research recommendations.

1. The development of a nature-based recreation and leisure market and associated tourism system should be considered within the Humberhead Levels. This is illustrated and discussed in the literature review (Chapter Two) and in the research discussion (Chapter Six). This should be based around existing attractions and visitor facilities to encourage visitor spend and potential inward investment, as noted in the literature relating to the benefits of tourism-based development and regeneration. As such, whilst existing literature, e.g. Rotherham *et al.*, (2002b), provides details of existing visitor attractions within the Humberhead Levels, a further and more detailed audit of the region with respect to identifying visitor attractions, potential and existing, may be required.
2. The establishment of one, or more, small-scale visitor centres should be considered as points of introduction and dissemination of visitor information, as discussed within Chapter Six. However, it should be noted that 'small-scale' in this context could be a facility such as presently operated at the Ouse Washes WWT Welney site, or at RSPB Dearne Valley. In conjunction with this, the establishment of a single, visitor-tourism operating organisation, such as Fens Tourism, is suggested. As noted above, this would present a coherent image of the Humberhead Levels as a visitor destination, from both visitor and recreation business perspectives, and is considered an important consideration of the research findings. The recent establishment of the Humberhead Levels and Moors Partnership may fulfil or support this role.
3. In conjunction with Recommendation 1, above, an audit of land within the Humberhead Levels suitable for the establishment of wetland-based wildlife sites should be undertaken. This needs to assess the willingness of landowners to consider the establishment of such sites on their land, and thus potentially enter into a future visitor market.
4. In conjunction with establishing a single visitor-tourism organisation, (Recommendation 2, above), a coherent policy approach to the establishment of brown, tourism road signs and similar information is required. Bedevilled by differing approaches adopted by the numerous local authorities and other Government Agencies within the Humberhead Levels, in conjunction with issues of funding, the piecemeal distribution of tourism information and differing policy

objectives limits the effectiveness of attempts to establish a visitor market from a recreation business perspective, (Chapter Six).

5. A further recommendation is for a coherent approach to modest, small-scale, landscape and environmental improvements across the region. The objective would be to improve visitor and local perceptions of the area.

7.0.6. Considerations for further research.

1. Further research is required into the links between recreation and leisure as factors of farm maintenance and land management, as identified within Chapter Five (Recreation Business findings) and discussed further within Chapter Six. Such research could be undertaken in association with Recommendation 3, above.
2. The importance of nature reserves with visitor facilities as public attractions linked to both wildlife and other interests requires further study. The research should consider the economic and social benefits attributable to the 'non-wildlife' use of such attractions, as identified by the research, Chapter Six.
3. With issues of visitor perceptions of landscapes identified as important in attracting visitors (Chapters Four, Five and Six), and discussed within the literature review (Chapter Two), further research is considered necessary in understanding potential visitors dislikes of fen landscapes. As such, research including visitor surveys on fen landscapes and associated perceptions should be undertaken within non-fen landscapes, i.e. hilly or mountainous landscapes, in order to assess the views of those individuals who do not visit fen landscapes, thus capturing data associated with 'non-users' (Veal, 1997) of fenland landscapes, as noted within Chapter Three. Data so collected could then be used to inform environmental improvements undertaken as suggested above (Recommendation 5).
4. With the importance of day and local visitors identified with respect to the case study regions (Chapter Four) and discussed in Chapter Six, in conjunction with the lack of such recognition and associated economic value within the literature review (Chapter Two), further research on the importance of day and local visitors to nature-based attractions is required. Such research could further investigate the financial value of day visitors to nature-based attractions and thus local economies, the potential for such attractions to attract day visitors, and the added value for local

visitors and communities from non-market values of wildlife and the wider environment



Photograph 12: Fenland sunset, WWT Welney.

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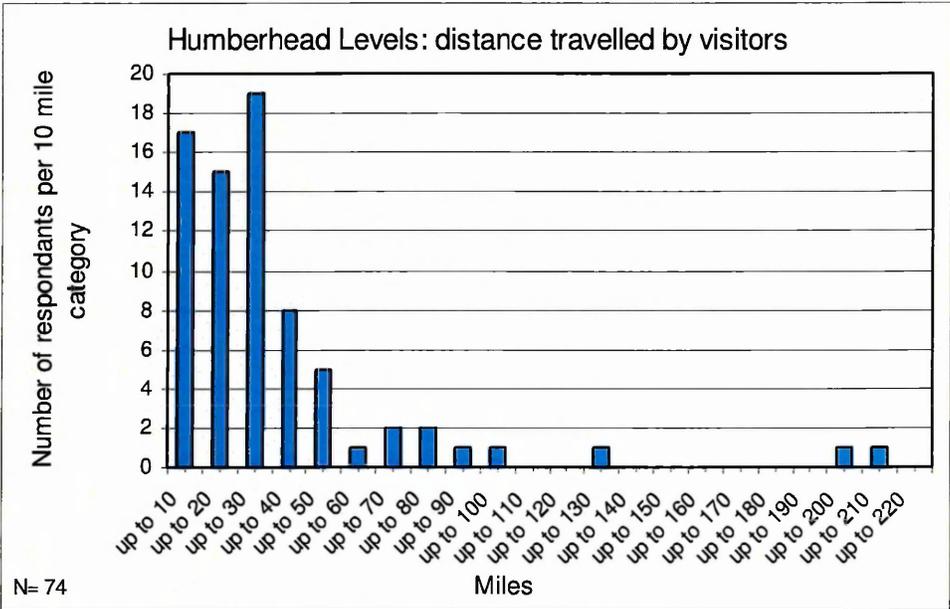
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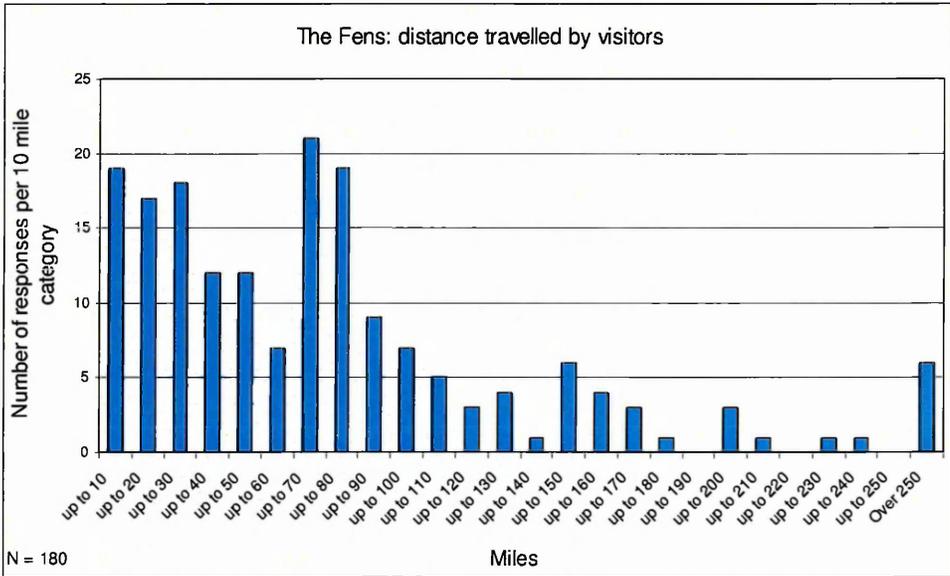
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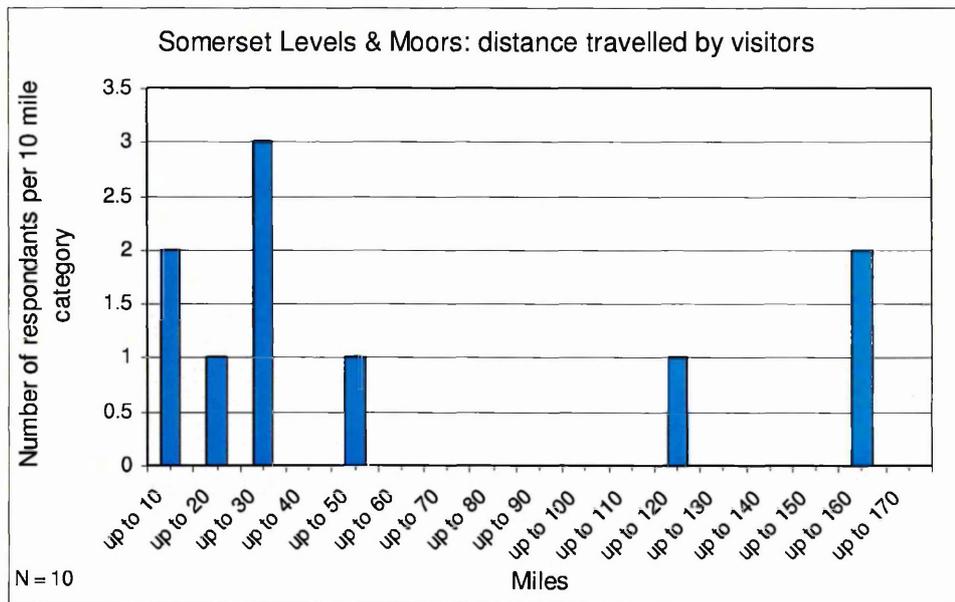
Appendix One: Visitor data.



Graph 70: Humberhead Levels - distances travelled by visitors.



Graph 71: The Fens - distances travelled by visitors.



Graph 72: Somerset Levels & Moors - distances travelled by visitors.

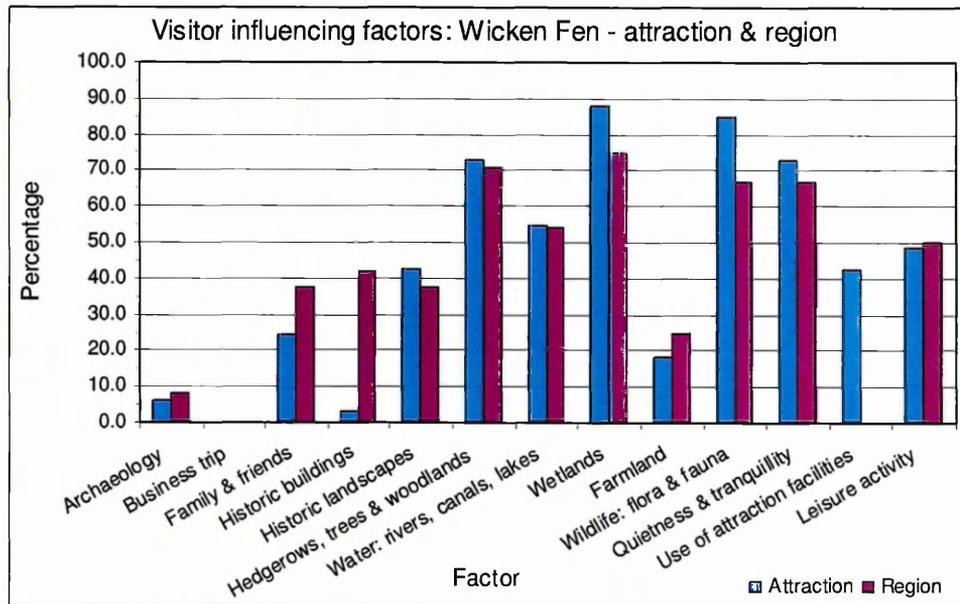
| | Attraction | | Region |
|---|------------|---|--------|
| Archaeological sites | | Archaeological sites | |
| Business trip | | Business trip | |
| Family & Friends | | Family & Friends | |
| Historic buildings | | Historic buildings | |
| Historic landscapes | | Historic landscapes | |
| Rural landscape/scenery | | Rural landscape/scenery: | |
| Hedgerows, trees & woodlands | | Hedgerows, trees & woodlands | |
| Water: rivers/canals/lakes | | Water: rivers/canals/lakes | |
| Wetlands | | Wetlands | |
| Farmland | | Farmland | |
| Wildlife - flora & fauna | | Wildlife - flora & fauna | |
| Quietness & Tranquillity | | Quietness & Tranquillity | |
| Use of attraction's café, shop, toilet | | Leisure activity - specify all: (e.g. fishing, equestrian, walking, food/restaurants/pubs etc.) | |
| Leisure activity - specify all: (e.g. fishing, equestrian, walking, food/restaurants/pubs etc.) | | | |

Table 103: Visit influencing factors from visitor questionnaires.

| Visit influencing factor | Wicken Fen | | Flag Fen | | RSPB Ouse Washes | | WWT Welney Centre | |
|------------------------------|--------------|----------|--------------|----------|------------------|----------|-------------------|----------|
| | Attraction % | Region % | Attraction % | Region % | Attraction % | Region % | Attraction % | Region % |
| Archaeology | 6.1 | 8.3 | 79.1 | 42.4 | 0.0 | 7.7 | 4.0 | 17.2 |
| Business trip | 0.0 | 0.0 | 0.0 | 3.0 | 0.0 | 0.0 | 0.0 | 3.1 |
| Family & friends | 24.2 | 37.5 | 34.9 | 42.4 | 3.1 | 0.0 | 22.7 | 26.6 |
| Historic buildings | 3.0 | 41.7 | 37.2 | 57.6 | 0.0 | 15.4 | 8.0 | 31.3 |
| Historic landscapes | 42.4 | 37.5 | 44.2 | 51.5 | 6.3 | 19.2 | 13.3 | 28.1 |
| Hedgerows, trees & woodlands | 72.7 | 70.8 | 34.9 | 51.5 | 21.9 | 30.8 | 20.0 | 42.2 |
| Water: rivers, canals, lakes | 54.5 | 54.2 | 27.9 | 48.5 | 46.9 | 53.8 | 30.7 | 50.0 |
| Wetlands | 87.9 | 75.0 | 27.9 | 33.3 | 78.1 | 76.9 | 73.3 | 78.1 |
| Farmland | 18.2 | 25.0 | 11.6 | 18.2 | 15.6 | 26.9 | 14.7 | 20.3 |
| Wildlife: flora & fauna | 84.8 | 66.7 | 30.2 | 48.5 | 84.4 | 80.8 | 73.3 | 79.7 |
| Quietness & tranquillity | 72.7 | 66.7 | 34.9 | 48.5 | 50.0 | 57.7 | 45.3 | 57.8 |
| Use of attraction facilities | 42.4 | N/A | 14.0 | N/A | 25.0 | N/A | 52.0 | N/A |
| Leisure activity | 48.5 | 50.0 | 30.2 | 27.3 | 68.8 | 69.2 | 50.7 | 54.7 |

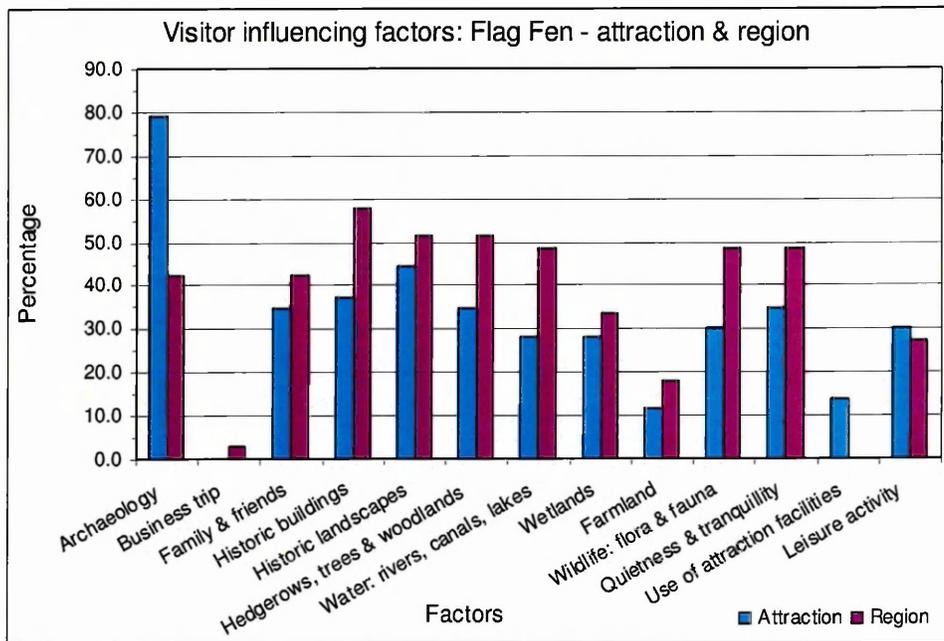
Wicken Fen Attraction: N = 33.
Wicken Fen Region: N = 24.
Flag Fen Attraction: N = 43.
Flag Fen Region: N = 33.
RSPB Ouse Washes Attraction: N = 32.
RSPB Ouse Washes Region: N = 26.
WWT Welney Centre Attraction: N = 75.
WWT Welney Centre Region: N = 64.

Table 104: Visit influencing factors at targeted, Fenland attractions.



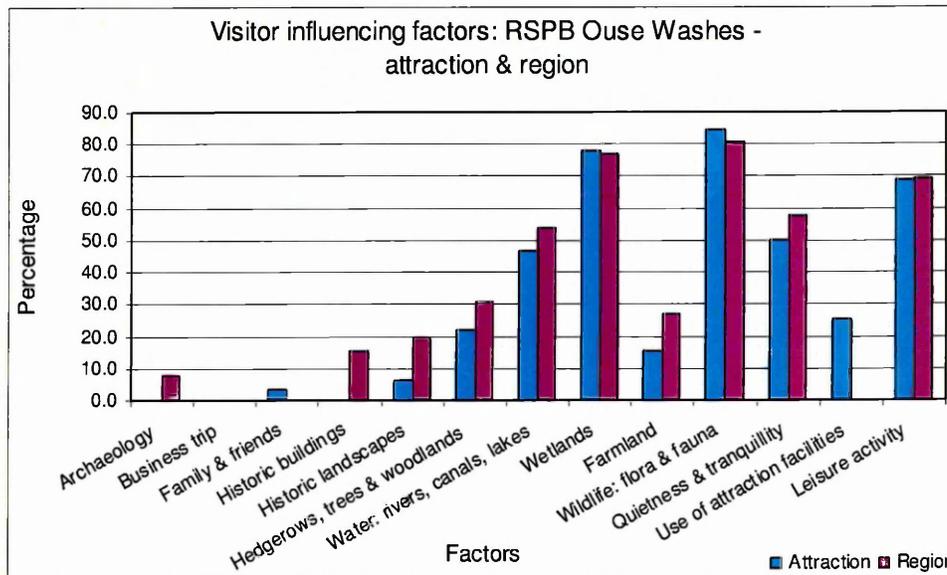
Attraction: N = 33.
Region: N = 24.

Graph 73: Visitor influencing factors: Wicken Fen.



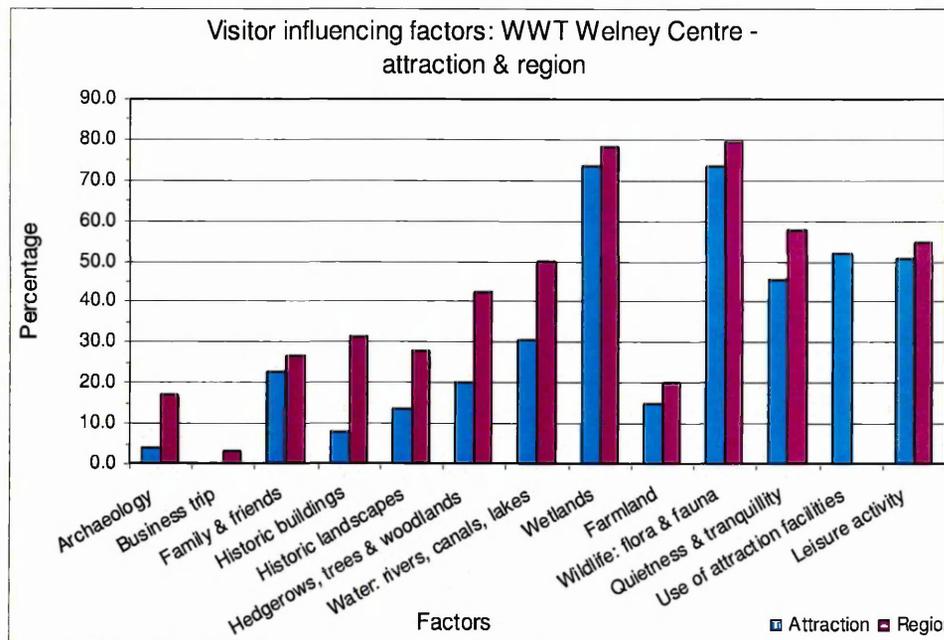
Attraction: N = 43.
Region: N = 33.

Graph 74: Visitor influencing factors: Flag Fen.



Attraction: N = 32.
Region: N = 26.

Graph 75: Visitor influencing factors: RSPB Ouse Washes.



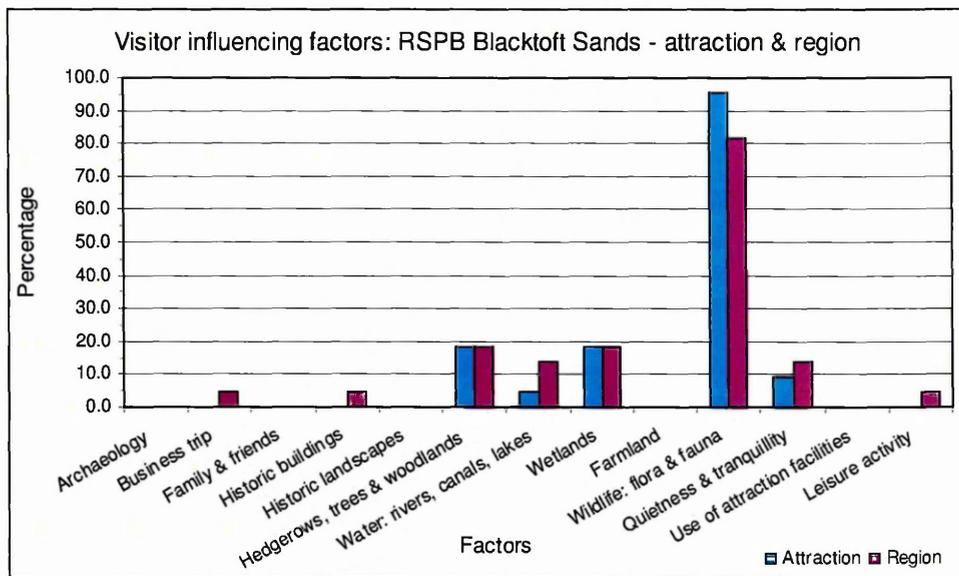
Attraction: N = 75.
Region: N = 64.

Graph 76: Visitor influencing factors: WWT Welney Centre.

| Visitor influencing factor | RSPB Blacktoft Sands | | Wildlife Wetland Animal Reserve | | Waterways Museum | |
|------------------------------|----------------------|--------|---------------------------------|--------|------------------|--------|
| | Attraction | Region | Attraction | Region | Attraction | Region |
| Archaeology | 0.0 | 0.0 | 0.0 | 0.0 | 10.0 | 0.0 |
| Business trip | 0.0 | 4.5 | 0.0 | 0.0 | 5.0 | 7.1 |
| Family & friends | 0.0 | 0.0 | 27.3 | 0.0 | 25.0 | 14.3 |
| Historic buildings | 0.0 | 4.5 | 0.0 | 0.0 | 25.0 | 28.6 |
| Historic landscapes | 0.0 | 0.0 | 0.0 | 0.0 | 25.0 | 35.7 |
| Hedgerows, trees & woodlands | 18.2 | 18.2 | 36.4 | 71.4 | 5.0 | 14.3 |
| Water: rivers, canals, lakes | 4.5 | 13.6 | 45.5 | 57.1 | 75.0 | 71.4 |
| Wetlands | 18.2 | 18.2 | 63.6 | 71.4 | 5.0 | 14.3 |
| Farmland | 0.0 | 0.0 | 18.2 | 14.3 | 0.0 | 7.1 |
| Wildlife: flora & fauna | 95.5 | 81.8 | 63.6 | 57.1 | 25.0 | 28.6 |
| Quietness & tranquillity | 9.1 | 13.6 | 63.6 | 71.4 | 25.0 | 28.6 |
| Use of attraction facilities | 0.0 | N/A | 36.4 | N/A | 35.0 | N/A |
| Leisure activity | 0.0 | 4.5 | 45.5 | 42.9 | 25.0 | 21.4 |

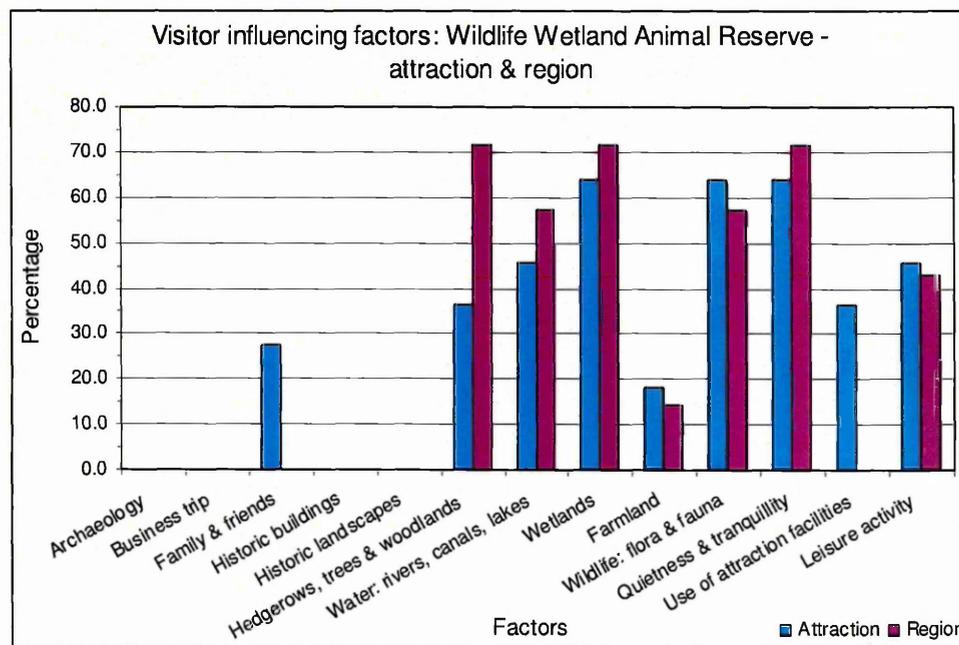
RSPB Blacktoft Sands Attraction: N = 22.
RSPB Blacktoft Sands Region: N = 22.
Wildlife Wetland Animal Reserve Attraction: N = 11.
Wildlife Wetland Animal Reserve Region: N = 7.
Waterways Museum Attraction: N = 20.
Waterways Museum Region: N = 14.

Table 105: Visitor influencing factors at targeted attractions within the Humberhead Levels.



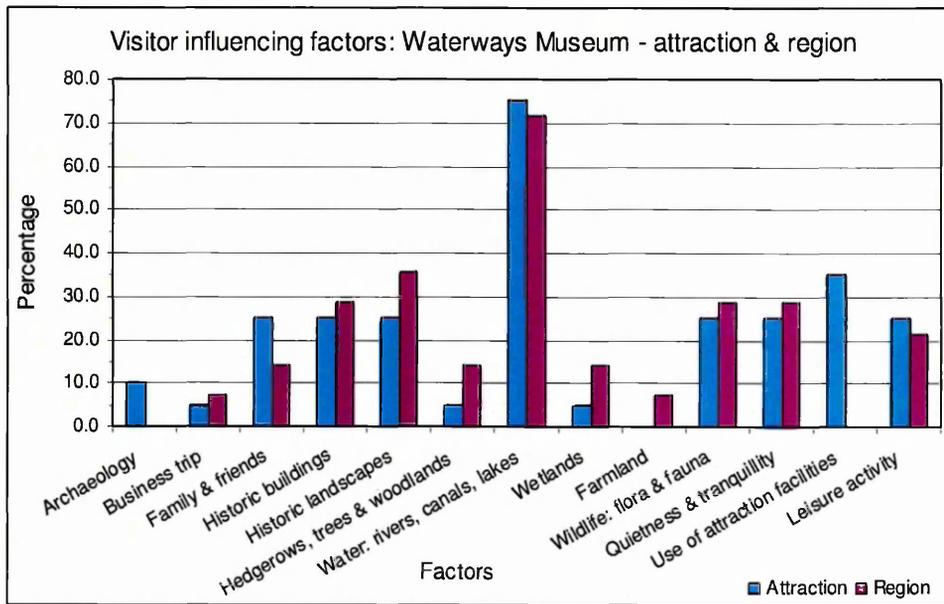
Attraction: N = 22.
Region: N = 22.

Graph 77: Visitor influencing factors: RSPB Blacktoft Sands.



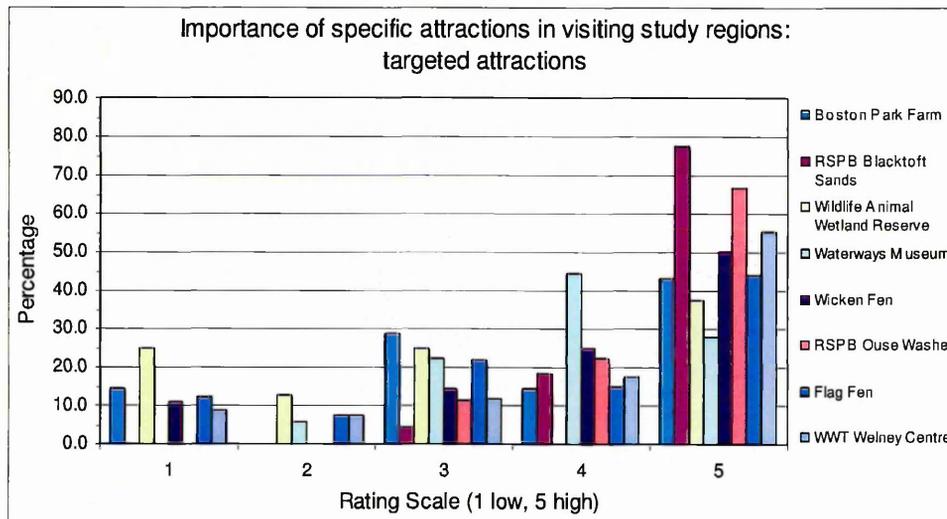
Attraction: N = 11.
Region: N = 7.

Graph 78: Visitor influencing factors: Wildlife Wetland Animal Reserve.



Attraction: N = 20.
Region: N = 14.

Graph 79: Visitor influencing factors: Waterways Museum.



Boston Park Farm: N = 7.
RSPB Blacktoft Sands: N = 22.
Wildlife Wetland Animal Reserve: N = 8.
Waterways Museum: N = 18.
Wicken Fen: N = 28.
RSPB Ouse Washes: N = 27.
Flag Fen: N = 41.
WWT Welney Centre: N = 69.

Graph 80: Importance of specific attractions in visiting study regions: targeted attractions.

| Region | Positive responses |
|---|---|
| <p>Humberhead Levels</p> | <p>Boston Park was half the price. (Boston Park Farm) Great for a family afternoon of entertainment. (Boston Park Farm) Lived up to my expectations. (Boston Park Farm) Our visit gave us more than we expected. (Boston Park Farm) Peatlands a unique experience..... Should prove attractive to nature lovers. (Peatland way opening walk) Will be worth visiting regularly to see the developments. (Peatland way opening walk) Potential to develop peat bogsinto a valuable attraction. (Peatland way opening walk) Peat working area was very interesting. (Peatland way opening walk)</p> |
| <p>Fens</p> | <p>Tranquil & secluded. Very pleasant. (Wicken Fen) Attractive as it's a wildlife haven. (Wicken Fen) Just a beautiful place. (Wicken Fen) Peace & tranquillity & a high standard of flora & fauna. (Wicken Fen) Plenty of animals & plants. (Wicken Fen) Better than we expected. (Wicken Fen) Interesting wildlife area. (Wicken Fen) Did not expect the area to be quite so interesting & containing such a range of flora & fauna. (Wicken Fen) Haven for wildlife. (Wicken Fen) Area of natural beauty. Restful & relaxing. (Wicken Fen) Can here birds singing. (Flag Fen) A very interesting glimpse into the past. (Flag Fen) Much more interesting than I expected, & also a haven for wildflowers, birds. (Flag Fen) (Expectations) fulfilled. (Flag Fen) An excellent facility. (Flag Fen) Informative and interesting (5 similar responses). (Flag Fen) Hoped for a lot but instead of 100% got 200%!(Flag Fen) Never visited the area before but will certainly do so again. (Flag Fen) Nice that it's not very commercial. (Flag Fen) It's a very nice area. (Flag Fen) Interesting day out birdwatching. (WWT Welney Centre) Excellent wildlife site. (WWT Welney Centre) Closeness to wildlife. (WWT Welney Centre) Always a pleasant place to visit because of the wildfowl. (WWT Welney Centre) Excellent for place for watching wildfowl. Always lives up to expectations. (WWT Welney Centre) As expected (good for birds). (WWT Welney Centre) Wonderfully peaceful & languid watching birds & scenery. (WWT Welney Centre) Bird watching facilities.....very good. (WWT Welney Centre) Sheer beauty of swans by floodlight. (WWT Welney Centre) One visit & we joined the WWT! (WWT Welney Centre) Our expectations were more than met. (WWT Welney Centre) Always a refreshing place to visit. (WWT Welney Centre) Peaceful setting, relaxing centre. (WWT Welney Centre) Excellent birdwatching experience.....well satisfied. (WWT Welney Centre) Very tranquil. (WWT Welney Centre) Welney viewing area great/interesting. (WWT Welney Centre) Lived up completely to our friends description. (WWT Welney Centre) Overwhelmed at the beauty of the wetlands and the birds. (WWT Welney Centre) Excellent centre. (6 similar responses). (WWT Welney Centre) Good wildlife viewing. (WWT Welney Centre) I expected spectacular views of swans and got them. (WWT Welney Centre) Great - lovely at sunset. (WWT Welney Centre) Very peaceful & conducive to birdwatching. (WWT Welney Centre) The centre was far better than we expected. (WWT Welney Centre) Second to nonefor observing birds & wildlife. (WWT Welney Centre) Better than expected. (WWT Welney Centre) Great place - well worth a visit. (WWT Welney Centre) Would visit again. (WWT Welney Centre) Gathering of swans spectacular far exceeded my expectations. (WWT Welney Centre) Fascinating. (WWT Welney Centre) Will go again. (WWT Welney Centre) An excellent day bird watching. (2 similar responses). (RSPB Ouse Washes) Wild and remote place (as perceived). (RSPB Ouse Washes) Abundance of winter waterfowl. (RSPB Ouse Washes) Delightful. (RSPB Ouse Washes) Expectations realised. Impressed with peacefulness of site. (RSPB Ouse Washes) The Washes are lovely. (RSPB Ouse Washes) Underestimated the tranquillity & beauty & the number of birds. (RSPB Ouse Washes) Great. (RSPB Ouse Washes) Very good area for water birds. (2 similar responses). (RSPB Ouse Washes)</p> |
| <p>Somerset Levels & Moors</p> | <p>Quietness & unspoiled area. (unknown Somerset attraction) Far better than expected. (unknown Somerset attraction)</p> |

Note: no responses for RSPB Blacktoft Sands, Wetlands Waterfowl Animal Reserve, & Waterways Museum due to the differing survey approach of the 'KP' visitor surveys at these sites.

Table 106: Additional selected positive responses regarding attractions within the study regions.

| Region | Negative responses |
|---|--|
| <p>Humberhead Levels</p> | <p>Didn't see rare birds/red & roe deer. Need visitor centre/RSPB to develop them for visitors. Don't know the boundary of Humberhead Levels. Appear to be underdeveloped. Visitor attractions generally of lower quality than in other parts of Yorkshire. Area is not particularly scenically attractive. It wasn't as peaceful as expected (on the boat). The managed landscape is often spoilt by poor quality/design industrial & farm buildings. These add to an unkempt appearance. Never heard of the Humberhead Levels before.</p> |
| <p>Fens</p> | <p>Flat & uniform! hard to pick out any memorable sites. Generally not attractive. 'Agri-business' is a priority <u>not</u> wildlife. On previous visits to the fens we have been disappointed, e.g. Spalding Flower Festival, & bulb fields. Expected to be flat and boring. Nothing to see or do really. Flat, boring agricultural landscape. Very flat and bloody hot. We rarely <u>stop</u> in the Fens. We drive across them. Poor part of the country, nothing going on. Areas of intensively farmed mono-cultures - as anywhere - ornithologically sterile. Were flat & bleak as expected! Very few villages - hence problem finding somewhere for meal. Mainly boring countryside. Transit route - boring!</p> |
| <p>Somerset Levels & Moors</p> | <p><i>No negative responses for the Somerset Levels & Moors.</i></p> |

Table 107: Additional negative visitor responses regarding study regions.

| Region | Positive responses |
|------------------------------------|--|
| Humberhead Levels | <p>A pleasant area to visit. Most areas were very quiet with obvious potential for attracting more visitors. More attractive than I expected. Expected the moorlands to be interesting & found them to be so. It's prettier than I'd expected. Very quiet, out of the way. Enjoyed. Nice, interesting place. Delighted. Thought it would be more industrial & less pretty than it turned out to be. Love it - very like parts of France. Blacktoft (<i>Sands</i>) very good. Good for birds. I like the area. There are more attractions than I realised. Very interesting. A great deal of places to visit with easy access. Much more interesting than I thought it would be. It is worth more exploration. I enjoyed myselfvery interesting. Very interesteda very rich cultural, historical, archaeological & industrial heritage here.</p> |
| Fens | <p>Loved the openness & big skies. Some very pretty villages, houses attractive. We like the open landscape & wide skies. Good birdwatching area. Very good. I shall certainly be back. Very pleasant & relaxing holiday. The Fens are a unique English heritage. It is a great <u>alternative</u> to urbanity. Enjoy the peace & quiet yet knowing there is other things around us as & when we decide to visit, Love open spaces & skies - fewer people & rush love the mood of the landscape. Area of 'big sky' country, very wide open spaces has the feel of being very still & calm on a good day. I enjoy the vast open skies in all weathers. Beauty of the landscape is unique. The large sky & wonderful views. I like the wildness. Has a perfect balance scenic tranquillity & historic interest. Have always loved the peace, tranquillity & openness of the Fens. Peaceful. The area looked beautiful driving through. Different from where we live - interesting. Enjoyed. Mysterious & challenging. Wide skies & sunsets & dawns. Historically very interesting. Fens are always full of wonderment. The changing skies are a constant joy. A unique habitat. Beautiful. Magical. Fantastic landscape - fantastic quality of light & vistas of Ely Cathedral. I grew up local to the Fens & the area & its attractions have improved dramatically. Enjoyed visit: Welney good for wildlife, Flag Fen interesting. Always fascinating if you are a wide open space person - wide skies, landscapes. Tranquillity - birdwatching relaxing from trials & tribulations at home! Great landscapes. Wonderful wildlife experience. Excellent birdwatching too! Interesting landscapes of agriculture & open water courses. Great. Unexpectedly attractive towns, good roads.</p> |
| Somerset Levels & Moors | <p>Region is now being managed well for wildlife. Rural, peaceful environment was expected. This was achieved. A quiet, friendly region, is quite like what I expected. Have known this region for years - it is still unspoiled as ever. Scenery & solitude far better than envisaged.</p> |

Table 108: Additional positive visitor responses regarding study regions.

Responses.

- Flat & dull were my expectations. It grows on you, friendly atmosphere everywhere. Waterways a delight. Landscape becomes more interesting, the sky so vast!
- Marshy, grey, windy, Dickensian & dull. Friendly, spacious, quaint, lovely architecture, good food, lovely beaches, local produce.
- Flat, cold, windy. Flat, beautiful skies, moderate weather.
- Expectations were fairly low as perceived to be rather flat & featureless landscape. Therefore surprised to find so much history associated with the area & soon began to enjoy what is in fact a rather unique part of the UK.
- If you arrive in the Fens on a January afternoon, like I did in 1953, your perception will be 'what a dreary, flat landscape'. However the land of ditches, drains, dykes and waterways will soon grow on you, especially in late spring & summer.
- Countryside distinctive but not appealing. However find the Fens can be vary varied - some area of landscape more attractive than others.
- Originally the Fens were not the most attractive area to me. But over the years I've become more engaged & aware of the subtleness of the landscape and history of the Fens.
- Quite bleak & unendingly flat, but interesting to drive around.
- Might be boring. Found it fascinating.
- Fens; beautiful/interesting. Lovely but could do with more coffee shops/gift shops/attractions.
- Very beautiful in good weather but can feel oppressive because of the flatness.
- We like the area but prefer the more hilly area of Worcestershire where we live.
- Other people's perceptions - flat, boring. My perception - openness, wonderful light, interesting small towns & villages.
- Flat landscapes & open skies. Interesting flora.

Note: no contrasting responses within the Humberhead Levels or Somerset Levels & Moors.
These responses are *not* detailed in previous tables.

Table 109: Additional visitor's expectations & realisations within the Fens.

| Region | Responses |
|------------------------------------|---|
| Humberhead Levels | <p>Better than I expected the unusual feature of the region are the moors. There are not many features which justify a journey/diversion. Very favourable for nature, but not for amenities like refreshments. Lots to do. Birding - very good. Birding is all we come for. Difficult to compare. Very favourably! It's lovely, accessible, & fascinating. To make a direct comparison is unfair. It is clear that it is a region just realising its potential. It needs firm <u>planning directions to achieve its goals.</u></p> |
| Fens | <p>The Fens are a unique landscape it is difficult to compare them - all (<i>regions visited</i>) are attractive in their own right. I do not think you can compare the Fens with anywhere else because the whole area is so unique. It's nice not to be over-run by other people. Generally a bit dull. Poorly compared to Northumberland, Yorkshire Dales, Lake District & Scotland. I live in the Cambrian Mountains, the Fens seem like polar opposites, the light, the sky and people. The Fens have an individuality unlike any other region. Bleak, empty, desolate sometimes, yet strangely attractive. Unlike any other region.....very important to keep. The Fens are comparable with any region in the world. Very flat, large exposure of sky, lovely sunsets. Not many attractions. Flat boring scenery.....anywhere really is more attractive. Boring. No hills, no trees, not much here. The Fens appear laidback & simple. Nice to be different. Each region has its own merits. Flat & boring - but good for birds! I don't particularly like the very flat landscape of the Fens ...but WWT Welney always pleases because of the abundance of birds. Fens are visually unattractive. The Fens have a character all of their own like no other part of the country. Landscape perhaps less appealing generally. Peace & space as with North Yorkshire & NE Scotland. Excellent opposite to NW Scotland. Comparing Fens with other regions is like comparing chalk & cheese. The Fens ...its black soil, dykes & flatness a charm all of its own. Not many places to visit, but fascinating history. Every region has its own charm - don't compare. Unique & therefore interesting. The Fens are much less interesting as they are so flat. London: nothing beats it. London has everything. More attractions in other regions. The Fens gives a much more easily coped with experience Very pleasing to the eye. A very unattractive landscape. I Like the flatness of the Fens - its a working landscape. Relatively few attractions/places of interest. Flat walks - no hills. Wonderful skies. Light on the landscape. Flat & boring. The Fens are high on my list of regions visited in the country. Interesting because different. Flat landscapes lack of trees & hedges. Canalised river/ditches. Fens scenery not as varied or 'wild'.... unique Fens tranquillity and reduced tourist numbers have their own appeal.</p> |
| Somerset Levels & Moors | <p>The area has taken a long while to develop but is now improving for the wildlife. Each experience is unique - can't compare.</p> |

Table 110: Additional visitor comments made when comparing regions visited.

| Region | Response |
|-------------------------|---|
| Humberhead Levels | <p>I did not like the industrial area of Stainforth & the surrounding area because they are used as a rubbish dump.</p> <p>The peat moors are very different to other areas, & are well worth visiting.....The villages are generally fairly attractive & residents were very welcoming.</p> <p>Liked the Moors in particular because of the scenery & possibility of seeing interesting birds, animals, wild flowers.</p> <p>Negative aspects ... a monotonous, flat agricultural area, devoid of hedges & trees. Too many unattractive areas of some towns, litter, clutter ...lack of local pride.</p> <p>Lovely colours in late summer landscape & light.</p> <p>It is quite (a) pretty area.</p> <p>Don't like Goole. Like landscape & wildlife.</p> <p>Sense of space. Easy to drive to find tranquillity. Accessible countryside.</p> <p>Very tranquil.</p> <p>Not too crowded. Nice & peaceful.</p> <p>Like the flat, open land; historic, picturesque villages, friendly people, variety available.</p> <p>To flat for me. But good for cycling. Rivers get in the way of direct routes. Motorways carve up the countryside. Some nice villages off the beaten track.</p> |
| Fens | <p>What it lacks in the way of hills, cliffs etc., it makes up with water, rivers etc.</p> <p>We like wide open vistas of earth & sky & the water courses.</p> <p>Roads are badly signposted.</p> <p>The flatness of the land is a little boring ..but have yet to discover the probable good side.</p> <p>Lack of variety in the landscape generally ... no obvious attractions on the skyline ... too much emphasis on Man's industrial use of nature.</p> <p>Scenically unattractive. Little regard for wildlife - with the exception of wildlife reserves.</p> <p>Likes: wetlands & associated wildlife, wide skylines.</p> <p>Bleakness in winter can be depressing.</p> <p>I enjoy being swallowed up by the sky & sitting by rivers.</p> <p>Do not like the flatness.</p> <p>Scale of the untamed area.</p> <p>We like the unique features of the Fen landscape.</p> <p>We like the remoteness although still close to Ely/Cambridge. However flatness can become monotonous.</p> <p>Love the migrating birds - wonderful skies. Long viewselemental aspect ... strips away the veneer of modern life empty spaces - huge natural canvas -essential in our built-up island.</p> <p>I like the open spaces & waterways.</p> <p>I enjoy the cloud formations & wide views.</p> <p>Roads bouncy with unexpected turns & ditches.</p> <p>I like the fact that it stretches all around you.</p> <p>Wonderful open skies of fenland.</p> <p>Unspoilt with lowish traffic.</p> <p>Can be very bleak in winter.</p> <p>Like being able to see large skies.</p> <p>Public transport is restrictive & unreliable.</p> <p>We love the peace & quiet, the great open spaces, villages, historic buildings, wildlife. There is nothing we dislike.</p> <p>The landscape/wildlife wonderful - highest quality.</p> <p>Not many trees & shady bits. Everywhere looked the same, not very green.</p> <p>Flatness - great panoramic views, big sky.</p> <p>Lack of hills!</p> <p>The flatness & general bleakness of the area do not encourage me to visit.</p> <p>Enjoy all features except NE winter wind, low flying aircraft, wind farms.</p> <p>Wildfowl & wading birds for birdwatching. Landscape - views.</p> <p>Like; habitats for a large variety of birds.</p> <p>Landscape beautiful. No attractive villages.</p> <p>Scenery lovely - towns often unattractive, lacking interesting shops & good standard cafés.</p> <p>I find the vast skyline spectacular. The space & views are so large-scale compared to other areas. The flatness can be monotonous.</p> <p>It's marvellous panoramic skies, flatness, special landscape & 'lifestyle'. Isolation, light & the waterways, & relation to the land.</p> <p>I like the light & sense of space.</p> <p>I do miss the hills of Dorset but the Fens do have a charm of their own. For watching dragonflies, botany, the Fens are hard to beat.</p> <p>Like remoteness & peace. Sometimes a problem finding somewhere to have a decent lunch.</p> <p>Open huge wheat & cereal fields are an eyesore ... trees & buildings are beautifully silhouetted.</p> <p>A powerful, unique beauty.</p> <p>Rather depressing flat landscape, lack of trees, uninteresting villages. Wonderful open skies & vast variety of wildlife.</p> <p>'Traditional' wetland habitats, quiet & peaceful.</p> |
| Somerset levels & Moors | <p>The beauty & freedom of the many walks available.</p> <p>The views are stunning!</p> <p>The roads are very uneven.</p> <p>Like the rural scenery, & cycle tracks.</p> |

Table 111: Further examples of visitor of likes and dislikes.

| Attraction | Descriptive response |
|--------------------------|---|
| Boston Park Farm | <p>My children enjoyed themselves, they also had the bonus of seeing farm animals too. One visit is sufficient - 'got the T-shirt'. Good local attraction. Good fun, picnic area, local. Kids love it. Getting involved with the animals, running excitedly through the maze. Not enough to do. No café.</p> |
| Wicken Fen | <p>Want to spend more time looking for wildlife. Wildlife haven. Very interesting wildlife & ecological context. Personally I find flat countryside boring as I grew up in it. Interested to see at different seasons of the year. So much of interest for us. We would like to come at different times of the year. Because its local, & we are National Trust members. Whenever I need to be away from 'civilisation' & to be close to nature & where I can walk & watch wildlife.</p> |
| Flag Fen | <p>If I am in the area again I might call in. To participate in some of the activities. Lots to do & see, very scenic. Interesting events & on-going archaeology. Lovely, tranquil atmosphere as well as the fascinating archaeology & replica roundhouses. An amazing place. To take part in another workshop & special days. Been there done that. (No) but may attend workshops. Still more to see. To show relations & friends the site. Done it! Not much tourist value, would I take a friend or visitor, no! Not interesting enough for a whole day. Children need something interaction with things. Not too much to see to travel the distance from home. Kids like it: adults like it & it is different every time we go: we have watched it develop. It is major attraction. Will take visitors to this interesting place.</p> |
| WWT Welney Centre | <p>To see the birds. Because we enjoy bird watching. Excellent wildlife spot all year. Good birdwatching facilities & excellent shop & restaurant. Just enjoy the tranquillity & the birds. Because of the birds. Not as interesting as expected. Too far off the beaten track and <u>extremely</u> badly signed. In winter for migrant birds. Watching wildlife successful & quiet peacefulness appreciated. Poor interest shown in visitors - lack of interest in shop etc. Regular relaxation with mental stimulation. Its an entertaining day out. Yes - support the Centre dedicated to preserving wildlife & countryside. To bring my grandchildren again in winter. It is warm & suitable for children. Close to home, floodlit (<i>swan</i>) feeding excellent. Walking. Peace. Easy to get to. Well run. We are interested in wildlife & found it very interesting. Will carry on coming here once or twice a year. Excellent centre & great birds. I like swans! Very interested in all the birds and look forward to a summer visit. A relaxing place, quiet, good escape from everyday living. To visit the swans in winter & other wildlife in summer. It is so peaceful.</p> |
| RSPB Ouse Washes | <p>Local & interesting. For the number of birds & wildfowl. In winter the birds are varied & interesting. Return to see the birds. Seasonal fluctuations and changes re. birds. To see birds you would not usually see elsewhere. We enjoy the birdwatching at all times of the year & the beauty of the scenery. Wildlife attraction for us. Local to residence. It suits us for birding & walks.</p> |

Table 112: Reasons for repeat visits to attractions: additional descriptive responses.

| Region | Descriptive response |
|---|---|
| <p>Humberhead Levels</p> | <p>Possibly. More so as areas visited are made more accessible, wildlife encouraged. Footpaths maintained to a higher standard would help. Yes, to see the development of the natural sites & wetland areas. Yes to concentrate on the wildlife & flora. Yes if they were interested in ornithology/ecology of the moors, otherwise no. Quiet area. People sociable. Flat for cycling. Yes - ecology of the area. Blacktoft for the birds. Birding. For Blacktoft. Has what we like. Close to home. Areas of unspoilt countryside. There seems to be lots of other places of interest to visit. If I was invited again I would not say no but I would not come specifically. Wish to find out more about this interesting place. There are so many places of interest to explore in the future. So much to see & discover - e.g. the picturesque villages, RSPB sites. Lovely area, so much more to see.</p> |
| <p>Fens</p> | <p>To see the parts we didn't have time for. To see the area at different time of year. We only attend Wicken Fen for birdwatching. Peace, beauty, birds, water, voles. its all here. For the peace & quiet. Enjoyment & peace. I would not be visiting if it were not for family & friends. Cambridge/Norfolk fens are attractive. Lincolnshire fens awful - ugly. Only when passing through. Its close enough for a day-trip. Whenever I feel like vast skies & spaces but also pleasant towns/villages with good places to eat....to visit & unwind. Very many places of interest for all ages throughout the area. Explore more parts of the area. We visit Fens often ...we once lived here and grew to like the area. Always something to see. If they were an avenue for something I wanted to do - but not for their own sake. Be nice to explore. Like the low traffic congestion. Landscape always dramatic. Only because I have friends here. Lots to do and see. Fens: we are learning to appreciate them. Quiet, unspoilt, good walking & cycling. I like walking & do not consider it to be a good walking area. Do not visit Fens except to get to Welney. Because of Welney & RSPB reserve. Because of stark landscape. Wonderful. Very friendly. Wonderful range of scenery. Unique area. Nature & history. Pleasantly unique. Love the area. Walking. peace. Live nearby - like the scenery. Only because of Welney centre. Excellent birds & landscape. Landscape & settlements & wildlife. No attraction apart from birding. Possibly - but may prefer to stay in Norfolk for more RSPB sites & coastal scenery. Birds. Access to wildlife. Not if I could help it - its flat & boring. Historic landscape.</p> |
| <p>Somerset Levels & Moors</p> | <p>For the retired and able there is nothing like a peaceful walk looking out for wildlife never knowing what the day will bring. Yes for the freedom to roam & watch wildlife at close range. Yes, definitely. Probably to quiet for many to return but not for all who like unspoiled areas.</p> |

Table 113: Reasons for repeat visits to study regions: additional descriptive responses.

| Region | Comments |
|-------------------------|---|
| Humberhead Levels | <p>I have no idea where the Humberhead Levels Starts or finishes. Uphill battle to attract tourists. Its not an area I would recommend to friends for a holiday. Like plenty of open farmland & not many built-up areas. Lack of information about the area. Generally not good for anything but the nature reserves. Just good for birds. Caters for many tastes - birdwatching, angling, shooting (if so inclined!) Nice, rural area. For us, the birding, we wouldn't have thought of coming here without that, but like it for other things now - found other things we like. Very impressed. Nice area - under visited. Needs more publicity. Too flat. Scenic area. Good for birds - wouldn't come otherwise. Rugged landscape is fantastic. Waterways a fantastic heritage & resource. The surrounding areas are really intriguing. Public transport is poor. Rail travel impossiblebuses non-existent any further than Howden/Goole/Selby. However, I'm intriguedwill be looking into Humberhead Levels more now.</p> |
| Fens | <p>Relaxed air about folk we encounter. Area tended & loved. Haven of peace for all. Will return to explore further. Fens do not appear to offer much to the visitor, been here for ...3 years & not seen all we want to! Quiet, enjoyable wildlife, remoteness though accessible. Countryside generally unattractive due to the nature of the agriculture. We meet lots of visitors from all over who love it & say they will return. As a first time visitor the Fens were full of pleasant surprises & exceeded our expectations. The Fen country is well worth exploring. Never been here before & its an interesting landscape will probably come back. I'm not really sure what the 'Fens' encompasses. I don't think the 'Fens' particularly want visitors. We need to market better. Flag Fen is a world class site.... & dreadfully British & understated. Has more to offer than you would expect. Roads could be improved. Needs more public transport. The Fens are a boring interlude on any journey..... a motorway through would be an improvement. The fens has much less to attract than other areas Peak/Lake Districts or Cornwall. I find a sense of place here to think. And it has a huge wow factor. I would find it hard to recommend to friends & visitors. It is a bit flat. Attractive in their own unique way - but once seen is adequate. Probably the biggest attraction is the huge sky. The variety of birdlife also attracts. I only visit the Fens to see a specific site or attraction. Depressing initially but at the same time exciting & awesome distances ...absolutely unique in the UK. A lovely area to live & work in. Too many visitor could spoil the very tranquillity that attracts wildlife & which visitors seek. The vastness of open flat spaces where the sunsets are none better. The roads are quiet & you feel close to nature. I did not know what to expect by the (swan) night feed but I have never seen such a spectacular site. The Fens are very uninspiring. A place without hills or sea in-lets but seldom disappoints in natural splendour. As a resident of the Fens, I feel it holds a mystique of its own. Misty mornings, evening sunset, & brass monkey weather when the wind from the NE blows. No-one would visit if you just 'sold' the Fens. Wildlife, fauna places of interest need to be highlighted. The wildlife is the major attraction of the Fens as the countryside is not particularly attractive. I find it very bland and bleak. Come at least once to appreciate just how lovely & peaceful the Fens are. Birdwatching, fishing & walks are lovely even if its cold. To many visitors the Fens may be rather bleak & off-putting during winter months.bird reserves give much needed winter attraction. An unspoilt area - water, trees & green fields providing good habitat.</p> |
| Somerset Levels & Moors | <p>I would definitely recommend this region. Should market a bit more. Wonderful area - especially for cyclists, walkers & birdwatchers.</p> |

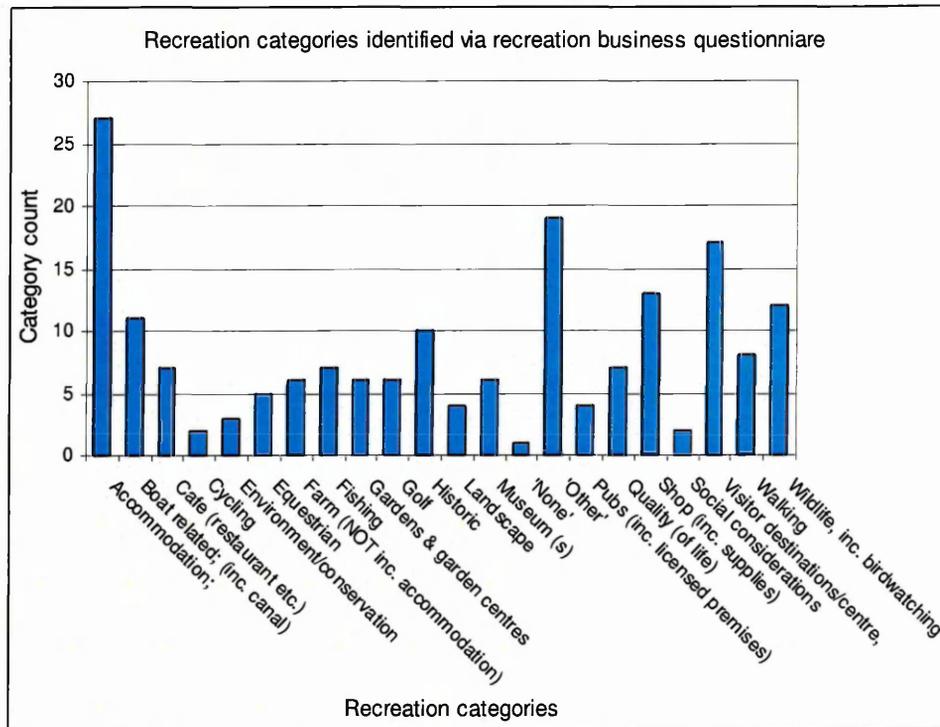
Table 114: Further visitor comments on attractions and study regions.

| Region & attraction | Comments |
|--|---|
| Humberhead Levels: Boston Park Farm | <p>Not too far from their homes (<i>Doncaster</i>) to come out for a visit of less than a day. Difficulty in finding things for the children to do(in) school holidays. Needs a café at the farm, or somewhere nearby. Tourism in the area - brilliant. Hatfield Church, mentioned in the Domesday Book, but not in the Peatland Way guide.... the area & attractions need advertising. Could do with something else in the area. No-one knows the area. Needs more advertising of the area & attractions. children love the animals. Be good to encourage locals out to see their own region. The idea of increased income/jobs is good. Many farmers are having to find something else to do. Would not like to see the Humberhead Levels/Thorne Moors area become solely for the use of twitcher-type people. many people in the Thorne area tend to present Thorne moors in a negative light, as a place of foreboding & a place to get lost.</p> |
| Fens: Wicken Fen | <p>This sort of place (Wicken Fen) is important. Lovely sunsets over the Wash, with wildfowl flying in. Wicken Fen used by locals for walks Tourism - too many people will ruin it. Come principally for the wildlife. Like low-key set up of Wicken. It takes a long time to visit what's on your doorstep. If something is shown on a leaflet or map, it must be there, otherwise people will be disappointed & may not come again. The social use (of having volunteers with learning difficulties) is an important factor. Wicken: 'beautiful'. Fens very interesting historically. Wicken: expensive (for visitors from Germany). Not much to see in the Fen, but Wicken was good. No motorways make it hard to travel. Local couple - often come to Wicken for a drink. Come down to Wicken Fen a lot, & use it for walks a lot, as well as café.</p> |
| Fens: Flag Fen | <p>Live on a farm a mile away & have never been to Flag Fen before. Lacks educational inspiration. Publicity good but does Peterborough really know what its got here? Visitor has stopped recommending Flag Fen to friends & visitors, as some have said 'why did you send us there? What's there to see or do?' . Flag Fen - a good attraction. Road signs are good. Flag Fen - a good site. Will come again. People think the Fens are dull, & they're not. The majority of visitors to Flag Fen are grandparents with grandchildren. Volunteer involvement in Flag Fen archaeological digs provide social benefits too. Big sky - goldfish bowl effect. Less welcoming staff make a visit less enjoyable, no matter how good the attraction. Need better signs to Flag fen. it took an hour to find the Fen. Flag Fen - very good. History of the area is fascinating. Two couples, live 3 & 20 miles away, never been to Flag Fen before. Think its very good.</p> |
| Fens: WWT Welney Centre | <p>The wild aspect is good. Fen landscape is an acquired taste, subtle. Initially boring, but you have to look/explore. Big skies are lovely. A lovely site, been once before came to see the swans. Two birdwatchers - they'd go to the Washes if they were elsewhere to watch birds. Fens irrelevant to their hobby of bird watching. Loves the area, the skies etc. Visits Welney quite often. Being able to simply watch wildlife/birds is quite a luxury. Come every now & then. Lovely area, not just birds: flowers etc. in summer. Fens: weird but lovely area, love the horizon to horizon big skies. Grows on you, different from home. Comes to Welney at least once a year, & brings visitors to Welney as well. Would go to Thorne Moors more often if there was a Welney-type facility. Thorne is an hour from home. Would be worried about car crime though. Moved to the area in part because of the landscape - lovely, grows on you. Love big skies. Local couple - came to Welney just for the sunset. Lovely area & sunsets. Welney - a must see place. Couple - one loves the Fens, one dislike. Both love Welney. First visit; 'fabulous'. Fens - nice & quiet, not spilt by tourism. Something special about the area.</p> |
| Fens: RSPB Ouse Washes | <p>Love the Fens. Its not just the birds, its the countryside, peace, quiet, isolation. lovely area. You've got to get into the landscape. To touristy! Need to get a balance. Lovely - come to the reserve quite often. You don't come here for anything else other than it is. Good reserve, came to get out of the house as its a nice day. RSPB & birds are good, but seem to have taken over a bit - restrict fishing, removed a bridge across drain, access & so forth. Need to get on with locals. Fishing & locals here long before RSPB. Washes not appreciated by those new to Manea. They may not even know the Washes are there. Birdwatchers will go anywhere to watch birds. But wives, children, more general visitors want more comfort, things to do, i.e. facilities. Birdwatchers will put up with any thing, but you must catch the next level of visitor. Fens; lovely area, best in UK for birds. Wicken Fen; example of conservation gone mad. Must manage sites properly for wildlife. People who bird watch don't spend much.</p> |

No Somerset Levels & Moors data.

Table 115: Non-verbatim, descriptive visitor comments obtained during questionnaire distribution.

Appendix Two: Recreation business data



Graph 81: Count of recreation categories identified via the recreation business questionnaires.

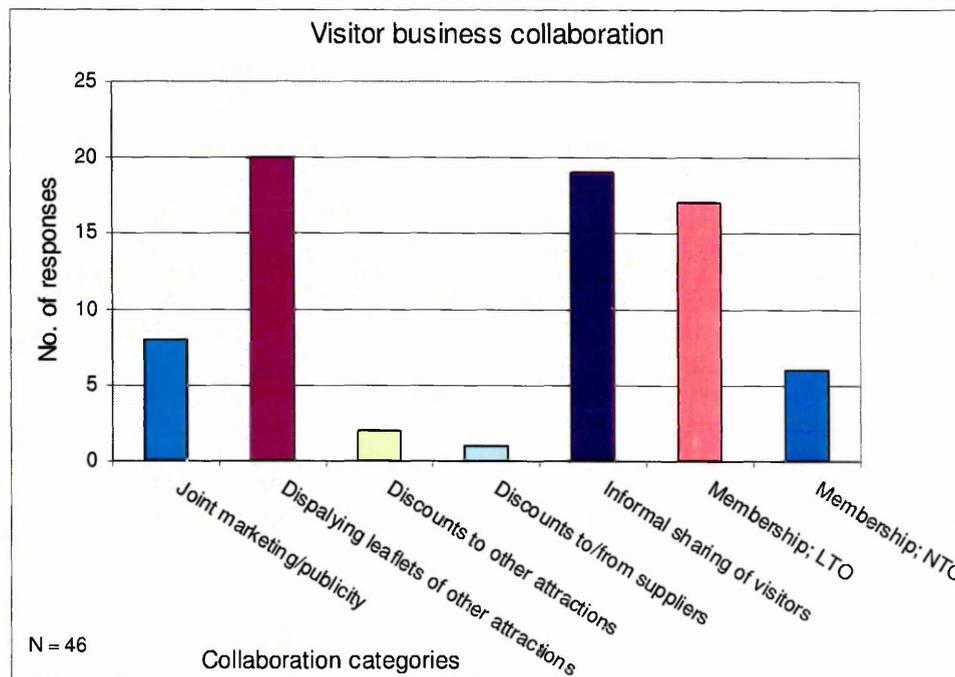
| Region | Market research undertaken: Yes | Market research undertaken: No |
|-------------------------|---|---|
| Humberhead Levels | Only verbal - word of mouth. | No. Word of mouth working very well. We are growing yearly. |
| | The hotel collates its own information. | No. we are working to nearly capacity. |
| | Yes, survey of other attractions & visitors. (market research) is being undertaken. | No. In Selby could never see the point. |
| | | No, never though it was necessary. |
| | | No - busy already - capacity full. |
| | No - no time. | |
| Fens | Only with existing customers. | No. Museum is open to explain history of the area. (Limited budget designated to other tasks) |
| | Yes. Mail shots. | No - too small a concern. |
| | Yes - annually - who, why, where from etc., & mystery (?) visitor. | |
| | We tried by questionnaire within the centre to determine where our customers came from. It turned out the vast majority came from within 6 miles of the centre. | |
| | Yes, publicity evaluation to see what brings people to special event days. | |
| | Yes. The majority of customers find us on the internet. | |
| | Visitor surveys among our own visitors only. | |
| | Use of local Tourist Board information. | |
| | Market research (1998) proved there was limited self-catering accommodation in the area - none ETC and NAS graded for wheelchairs, and no barn conversions. A vast diversity and numerous attractions available. Small questionnaire available to visitors. | |
| Somerset Levels & Moors | Very little - cost factor, but some personal face to face with visitors. | No/time |
| | Local authority, SW Tourism, County Council - all carry out market research & we feed into this. | No. Nor specifically a visitor attraction. |
| | In process of doing so through HATS - Horses and Tourism Somerset. | Done it all my life - experience. |
| | Yes, within last year a survey was undertaken to support this business in its fight against the County Council to enable it to continue providing a valuable local service and to avoid closure. (Lease agreement negotiations ongoing) | Over 10 years we have learned what works. |
| | Very little. | No, we have as many visitors, guests as we wish to accommodate. |
| | Asking customers. | No. Don't know how to. |
| | Leaflets left in shop as questionnaire. | No. We are happy to have a few visitors a year. |

Responses edited for relevant information.

Table 116: Descriptive responses to questions regarding market research.

| Region | Response |
|---------------------------|--|
| Humberhead Levels | We are waiting for planning permission for 18 (?) more rooms. |
| Fens | Desirable yes, but due to our rural location, business cannot afford to put on more electric hook-ups - 3 phase - unless a grant was obtained. As yet have not found one. |
| | Full to capacity. |
| | More visitors desirable to up income then maybe employ some staff. At present limited by number of volunteers. |
| | We are 99.9% occupancy over the last 18 months and have no plans to expand bed spaces available. We offer friendly hospitality with help on site for those requiring it. |
| Somerset Levels & Moors | We let rooms to the maximum we are allowed in terms of overnight stays. We are trying to develop meeting areas where people can use the space, peace and quiet with food if required. |
| | Yes. We would like to be full all the time. (If full) we forward them (visitors) to other members of 'Farm Stay'. |
| | Yes, yes, enough space for people. Volunteer staff can cause limitations. Labour intensive (attraction). |
| | We could do with a few more customers. |
| | Would like to. No money, lack of grant aid. |
| | No spare capacity. |
| | Yes, need more weekday-visitors. |
| | Semi-retired do not wish to expand. |
| | Yes it has and they are (desirable).....always provided, of course, that Somerset County Council can accept its value to the locality and grant it (the café/garden centre) a new lease.....(little picture of a flying pig included). (Somerset CC are not renewing the lease on the café/garden centre, causing some upset). |
| | B&B has capacity for a few more visitors. Self-catering is brand new, therefore it has capacity for many more. |
| | yes - off season, Nov - Mar. |
| | We do not look for more guests it is done because we enjoy it not because we have to do it for income. |
| | More visitors during winter. |
| | No. Only 7 letting rooms. |
| We could have a few more. | |

Table 117: Reasons given in response to the question; 'Are more visitors desirable?'



LTO; Local tourism organisation.
NTO; National tourism organisation.

Graph 82: Visitor business collaboration.

| Region | Responses |
|--------------------------------|--|
| Humberhead Levels | Not yet |
| | Business Link development grant was vital to expand business re. facilities and advertising. |
| | No, only tree planting. |
| Fens | No - too many restrictions to access. |
| | No - except Countryside Stewardship. |
| | Heritage Lottery grant to set up museum on the Denny Abbey site. |
| | Rural Development Commission grant towards barn conversion. |
| | Lottery & RDF & EH to establish business. |
| | EEC 5b finance for tourist operation. |
| | 1995 East Cambridge District Council grant towards extension - including café and foyer area, Extended exhibition areas, viewing walkway. This was critical in museum being established. |
| | Capital grant for sustainable tourism 1999. 40% of capital expenditure on renovation of properties. |
| Somerset Levels & Moors | Landfill tax grants, agricultural grants; both very important for running of recreational and agricultural operations. |
| | EH Funds - rebuild main chimney, re-roof buildings. Applying for Lottery funds. |
| | No. Still trying! |
| | Received a redundant buildings grant from MAFF in 1990 to build first cottage - encouraged us to try new venture. Have applied for RES grant - waiting to hear result. |
| | RES grant applied for - turned down - they said have to prove need. Project - equine tourism backed by TDB Council & Tourism Board, Levels & Moors Project, & Somerset Agric. Service, but failed. Project now on hold while HATS (Horses & Tourism Somerset) try to prove need for a group of B&B farmhouses with equine (<i>activities</i>) to do trail from one to another. |
| | Business Chest. |
| TIC grant on start up in 1994. | |

Table 118: Descriptive responses regarding the provision of grant aid.

| Region | Positive themes/content | Negative themes/content |
|------------------------------------|--|---|
| Humberhead Levels | <p>People are very pleasantly surprised once visited. Our visitors think its quiet, picturesque and flat. Ideal for walking, fishing etc.</p> <p>The few tourists who visit Selby say what a pleasant region.</p> <p>Visitors are surprised at variety of habitats and wildlife.</p> <p>Raised profile.... would open up a virtually unknown wild area to.... people & help the local economy.</p> <p>People love the area.</p> | <p>A lack of public amenities and too much litter.</p> <p>Low tourist interest.</p> <p>Goole has a poor image. Clean the streets. Repair the pavements.</p> <p>The outside perception of Selby is that of a small industrial town surrounded by coal mines and power stations.</p> <p>We cannot compete with the rest of Yorkshire, which has so much more to offer.</p> <p>(HHL's) Never specifically mentioned.</p> <p>Perceived as flat & uninteresting.</p> <p>What are the Humberhead Levels?</p> <p>Never heard of it referred to Humberhead Levels.</p> <p>Where is it? lack of information?</p> <p>Don't link it (<i>the area</i>) to the Humberhead Levels. As a name 'Humberhead Levels' is not known.</p> |
| Fens | <p>Once discovered, the Fens is often revisited Charmed by its diversity:- Quote: A thinking man's landscape.</p> <p>Peace, tranquillity & much historical interest.</p> <p>Peace & huge skies!</p> <p>Superb sunsets. More interesting than thought.</p> <p>Increased marketing should benefit the Fens.</p> <p>Great. Can't wait to come again.</p> <p>The more publicity the better.</p> <p>(visitors) love it and come back.</p> <p>(more marketing) a benefit in terms of numbers.</p> <p>Most (visitors) enjoy peace & tranquillity of countryside & uniqueness of flat scenery.</p> <p>When visitors get here to the area they really enjoy it.</p> <p>Far more marketing would be useful.</p> <p>Many first-time visitors are nicely surprised by Fens.</p> <p>Quiet area, good wildlife.</p> <p>Relatively unspoilt</p> <p>From a business point of view more visitors most welcome.</p> <p>Generally enjoy the quietness.</p> <p>A higher public profile would be helpful.</p> <p>Surprised how much they like the 'Fen landscape'.</p> <p>Somewhere for a quiet restful jaunt.</p> <p>'Beautiful skies', peace and quiet.... so many places of interest!</p> <p>A higher public profile of the Fens and its history and diverse attractions is desirable.</p> <p>Visitors who come love the fields of flowers and flower festivals. Some love the 'huge skies' and the bird watching.</p> | <p>General ignorance of where Fens are is a big obstacle.</p> <p>Image - uninteresting flatlands.</p> <p>Flat & boring.</p> <p>Pandering to the developer.</p> <p>Sometimes negative - not much to do, not very attractive as very flat.</p> <p>(More marketing a) detriment in terms of damage to the fabric of the Fens - especially by birdwatchers!</p> <p>Quite a low image.</p> <p>..... couldn't possibly come to Fens because its flat.</p> <p>Lacking in facilities and attractions.</p> <p>Fens can't compete with areas such as the Lakes.</p> <p>Some tourist offices charge far too much to small businesses for advertising.</p> <p>People think of the Fens as having very few attractions.</p> <p>The flatness, straight roads</p> <p>(the Fens) as flat, boring and treeless with nothing cultural or scenic to attract people.</p> <p>Not so much countryside as a food factory with no wall.</p> <p>Very few restaurants.</p> <p>Too much red tape and too many people being consulted before decisions are made. One coordinated body is best.</p> |
| Somerset Levels & Moors | <p>A high profile of the area generally would help.</p> <p>Beautiful.</p> <p>Somerset described as a well-kept secret.</p> <p>The district councils are beginning to co-operate & not compete</p> <p>Visitors help local economy.</p> <p>Outstanding archaeological interest.</p> <p>Attracts people because of its beauty, tranquillity & interest in general - the specifics emerge after they have arrived.</p> <p>Fairly good.</p> <p>Friendly, tranquil area.</p> <p>More people now holiday in Somerset. Many years ago it was just somewhere they drove through.</p> <p>Very beautiful.</p> <p>They love the peace and tranquillity & stunning scenery.</p> <p>As much (marketing) as possible would be good.</p> | <p>Visitors - don't appreciate Somerset's industrial heritage. 'Out in the sticks'</p> <p>Define region!</p> <p>Too much further development could spoil the county.</p> <p>Place to go through, not to go to, so need to upgrade Somerset's image.</p> <p>There is not sufficient awareness of the facilities Somerset has to offer.</p> <p>Whizzing off to Devon and Cornwall</p> <p>This (Somerset) is being largely destroyed by too much building.</p> <p>We have enough, provided we do not kill the Golden Goose by over-building.</p> <p>We have sufficient around here.</p> <p>No (to more visitors, marketing etc.).</p> |

Unlimited number of themes identified per questionnaire response to highlight reoccurring themes/content.
Image & perception responses: N = 47.
Marketing responses: N = 40.

Table 119: Additional themes relating to regional image, perception and marketing.

| Region | Descriptor category | Visitor attraction Count | Region Count |
|-------------------------|--|--------------------------|--------------|
| Humberhead Levels | Access | 1 | 1 |
| | Activity (walking, cycling, equine etc. excluding boating/fishing) | 0 | 0 |
| | Countryside/rural/landscape | 3 | 1 |
| | Culture/historic/archaeological | 2 | 1 |
| | Facilities/amenities/neighbouring areas/cities/towns | 3 | 1 |
| | Farm-related | 1 | 0 |
| | Local produce | 0 | 0 |
| | Peace/tranquillity/quiet | 2 | 0 |
| | Water/boats/fishing | 2 | 1 |
| | Wildlife/nature | 1 | 2 |
| Fens | Access | 2 | 0 |
| | Activity (walking, cycling, equine etc. excluding boating/fishing) | 2 | 4 |
| | Countryside/rural/landscape | 6 | 4 |
| | Culture/historic/archaeological | 4 | 7 |
| | Facilities/amenities/neighbouring areas/cities/towns | 3 | 3 |
| | Farm-related | 1 | 0 |
| | Local produce | 0 | 2 |
| | Peace/tranquillity/quiet | 7 | 1 |
| | Water/boats/fishing | 5 | 5 |
| | Wildlife/nature | 4 | 8 |
| Somerset Levels & Moors | Access | 2 | 0 |
| | Activity (walking, cycling, equine etc. excluding boating/fishing) | 1 | 2 |
| | Countryside/rural/landscape | 8 | 1 |
| | Culture/historic/archaeological | 2 | 1 |
| | Facilities/amenities/neighbouring areas/cities/towns | 1 | 3 |
| | Farm-related | 4 | 0 |
| | Local produce | 4 | 0 |
| | Peace/tranquillity/quiet | 5 | 0 |
| | Water/boats/fishing | 0 | 0 |
| | Wildlife/nature | 1 | 1 |
| Total | Access | 5 | 1 |
| | Activity (walking, cycling, equine etc. excluding boating/fishing) | 3 | 6 |
| | Countryside/rural/landscape | 18 | 6 |
| | Culture/historic/archaeological | 8 | 9 |
| | Facilities/amenities/neighbouring areas/cities/towns | 7 | 7 |
| | Farm-related | 6 | 0 |
| | Local produce | 4 | 2 |
| | Peace/tranquillity/quiet | 14 | 1 |
| | Water/boats/fishing | 7 | 6 |
| | Wildlife/nature | 6 | 11 |

Each category count recorded once only per questionnaire response to indicate principle factors.

Visitor attraction responses: N = 48.

Regional responses: N = 35.

Table 120: Categories of factors used by recreational businesses in advertising visitor attractions and the case-study regions (By region).

| Region | Theme: Policy |
|-------------------------|---|
| Humberhead Levels | <ul style="list-style-type: none"> - Local Highways Agency office won't allow brown signs to be put up. - Used to have a bonfire/fireworks display, but now too expensive (insurance, licence etc.). - Used to have a bikers night, but locals complained - noise, speed etc. - Cannot get brown signs, 'not a tourist attraction', according to local council, even though the owner is prepared to pay for the sign. How can he get customers/tourists without signs? Yet some fisheries do have brown signs. - Council say he doesn't have enough events. Are the 3 or 4 fishing matches a week taking place not enough events? - Planners let a farmer put up a large barn with know planning permission, but demand planning permission for the site-ing of a (shipping) container to be used as storage space (<i>and nicely blended in with the surroundings, compared to the barn</i>). - Doncaster is under-sold. Could do more to promote itself, although it's doing more this year. Nice brochure for Doncaster and surroundings. - Aire and Calder Canal - a commercial waterway. BW has a statutory obligation to maintain the canal in a fit state for commercial use, so leisure craft are a low priority. Similarly on the New Junction Canal. - Aren't allowed to put up brown signs, even though they are willing to pay for them. Yet 'across the river' to the south, brown signs are allowed, even common. - Selby Council does not seem to be interested in tourism. No encouragement for tourism businesses. - Low opinion of councillors and their approach to tourism/leisure and associated businesses. The comment was made 'This is Selby', as if to indicate the council don't help. Also, who will get the increased business? Not tourism/leisure. - Old tourism office in Selby closed 4 years ago, but signs still point to it. By-pass and new tourist office are on opposite sides of town. - Been doing B&B for 20 years - thin Selby Council do not really understand tourism, spending money in the wrong areas, e.g. shows in Belgium. - Tourist trade dropped when the Leeds M1-A1 link road was opened, and the signs to York taken down on the M18, (<i>diverting cars up the M1?</i>). Need signs to direct people to York through the area. - Local tourism meetings usually in the morning. Not much good if you have to see guests, make breakfast, beds etc. Much better if meetings were in the evening, and not confined to the 9-5 working day. - No longer have heavy horses as a visitor attraction - too much red tape (<i>and possibly semi-retired</i>), but still breed horses. - Too many doing the same thing in the area will lessen the overall attraction. |
| Fens | <ul style="list-style-type: none"> - Council don't want to encourage more traffic down the small lanes (increased maintenance), so this limits visitor and income potential. - Could do with better bus service. Some visitors want to leave their motor-homes in the park and get a bus to town. No buses, so this is not possible. (<i>More buses would also benefit the local population too</i>). - Could not convert the barn to self-catering if it was in Lincolnshire. Lincolnshire want to keep it rural, and generally only allow workshops in barns. - Council slow to give planning permission for improvements. - Councils do not understand tourism - but would like the benefits. - Bit of a council myth that tourists come to Boston, and numbers given are too high. Done in response to grant requirements. - Council possibly mistakes contract workers for visitors, and is currently wanting to increase accommodation in the area. But when the work is done, all the contractors will leave. Tourism demand not high, most of the hotel guests are contract workers. + Just got approval for a brown 'bed' sign to be put up on the roadside, giving directions to the B&B. (<i>Its down a typical fen road, few signposts</i>). |
| Somerset Levels & Moors | <ul style="list-style-type: none"> - Willows garden centre lease to expire in 2.5 years. Somerset CC will not renew. Centre attracts many visitors, sells local products, so brings income in. - No link-up between quango's and those running B&B's etc. Quango's do not understand the operation of B&B's etc. - For many people, best to keep B&B's to less than 6 people - less hassle, less over-heads. More than six people, then costs/overheads increase hugely, & legal requirements are tougher, take more time etc. - Council statistics often are at odds with Mick's. His good years are often the Councils (Somerset's) poor years, & vice a versa. + Lots of well-meant and kindly but not really wanted interference from local council. + Somerset Tourism have been very helpful. Full of praise. Good information for the disabled. (<i>From two visitors</i>). + All the farmland is in an ESA area, so farmer gets subsidies, and is in favour of the ESA/protection of the area (whilst acknowledging he gets subsidies), and the encouragement of birds etc. |

Note: not verbatim.

Table 121: Further policy and related issues noted by recreation businesses.

Appendix Three: Survey questionnaires and examples of interview questions.

Survey introductory and covering letter: page 434.

Visitor survey questionnaire (site specific): page 436.

Visitor survey questionnaire (non-specific, regional): page 441.

Recreation business survey questionnaire: page 446.

Farm recreation business follow-up survey: page 454.

Themes for semi-structured interview questions: page 456.



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Executive Dean of Faculty
Professor Philip Garrahan

***Humberhead Levels Visitor
Research Project.***

Spring - Summer, 2004.

To whom it may concern:

Sheffield Hallam University, in association with the Countryside Agency, Leeds, are undertaking research into the development of visitor attractions based on wildlife and the managed, agricultural landscape, and their impacts on the rural economy and communities. In order to inform the research, surveys of visitors, visitor attractions and associated businesses are being undertaken within the Humberhead Levels, the Somerset Levels, and the Cambridgeshire Fens.

Information gained through conducting surveys will enable the potential impacts and benefits of rural visitor attractions to be assessed, and issues raised investigated. As such, any information provided will be of great assistance to the research.

The surveys are entirely voluntary and all information provided will be treated in confidence. It is not essential that those choosing to take part in the survey provide contact details, thus information may be provided anonymously if preferred.

Thank you for your assistance.

Simon Doncaster.

Sheffield Hallam University & the Countryside Agency, Leeds.

For further information, please contact:

S. Doncaster,
Research Assistant
Research Room 1130,
Faculty of Organisation and Management
11 Floor, Owen Building, City Campus
Sheffield Hallam University

Tel: 0114 225 2988
e-mail: s.h.doncaster@shu.ac.uk

Visitor survey questionnaire (site specific).

Fenland Visitor Questionnaire¹⁷

All information provided will remain anonymous and confidential.

PLEASE TICK OR COMPLETE ALL APPLICABLE BOXES

Date:

1) Visitor's home town & post code:

2) Visitor attraction or facility where questionnaire obtained: WWT WELNEY CENTRE

3) Number of visits to **The Fens** region before, if any: If you live locally, please tick:

4) Reason (s) for this visit:

| | | | |
|---------------------------|---------------------------|--------------------------|--------------------------|
| Holiday or pleasure visit | Visiting family & friends | Business | Other - please specify |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

5) Length of stay:

| | | | |
|--------------------------|--------------------------|--------------------------|---|
| Day-visit | Weekend - short break | 4 nights & longer | If less than one day, how long (hours). |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

6) If staying overnight, in what type of accommodation: Or, if returning to your own home, please tick:

| | | | | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| B&B or guesthouse | Self-catering | Hotel; half-board (B&B) | Hotel; full board | Caravan or camping | Family or friends | Other - please specify |
| <input type="checkbox"/> |

Is the accommodation on a working farm (please tick) **YES** **NO**

7a) Which of the following factors influenced your decision to visit the **WWT Welney Centre** specifically, and **The Fens** generally, (Tick all applicable categories):

| | WWT Welney | | The Fens |
|---|--------------------------|---|--------------------------|
| Archaeological sites | <input type="checkbox"/> | Archaeological sites | <input type="checkbox"/> |
| Business trip | <input type="checkbox"/> | Business trip | <input type="checkbox"/> |
| Family & Friends | <input type="checkbox"/> | Family & Friends | <input type="checkbox"/> |
| Historic buildings | <input type="checkbox"/> | Historic buildings | <input type="checkbox"/> |
| Historic landscapes | <input type="checkbox"/> | Historic landscapes | <input type="checkbox"/> |
| Rural landscape/scenery | <input type="checkbox"/> | Rural landscape/scenery: | <input type="checkbox"/> |
| Hedgerows, trees & woodlands | <input type="checkbox"/> | Hedgerows, trees & woodlands | <input type="checkbox"/> |
| Water: rivers/canals/lakes | <input type="checkbox"/> | Water: rivers/canals/lakes | <input type="checkbox"/> |
| Wetlands | <input type="checkbox"/> | Wetlands | <input type="checkbox"/> |
| Farmland | <input type="checkbox"/> | Farmland | <input type="checkbox"/> |
| Wildlife - flora & fauna | <input type="checkbox"/> | Wildlife - flora & fauna | <input type="checkbox"/> |
| Quietness & Tranquillity | <input type="checkbox"/> | Quietness & Tranquillity | <input type="checkbox"/> |
| Use of attraction's café, shop, toilet | <input type="checkbox"/> | Leisure activity - specify all: (e.g. fishing, equestrian, walking, food/restaurants/pubs etc.) | <input type="checkbox"/> |
| Leisure activity - specify all: (e.g. fishing, equestrian, walking, food/restaurants/pubs etc.) | <input type="checkbox"/> | | |

¹⁷Region and visitor attraction name changed to suit survey location

7b) Other reasons for visiting the **WWT Welney Centre & The Fens**, if any - please specify: (e.g. quality of life, peace, relaxation, freedom, 'get away from it all', education, etc.)

.....
.....

8a) Was the number and variety of attractions within **The Fens** a factor in your decision to visit the region? Please rate the importance of this on a scale of 1 - 5. (circle appropriate number. 1= low, 5 = high).

1 2 3 4 5

8b) On a scale of 1- 5, how important was the **WWT Welney Centre** in your decision to visit **The Fens** region? (circle appropriate number. 1= low, 5 = high).

1 2 3 4 5

9) Other visitor attractions/sites visited locally:

.....
.....
.....

10) Perceptions & expectations of the **WWT Welney Centre** and **The Fens** before visiting, if any, and opinions of the **WWT Welney Centre** and **The Fens** having visited:

WWT Welney Centre

.....
.....

The Fens

.....
.....

11) How do **The Fens** compare with other regions visited? Please list the main other regions visited.

.....
.....
.....

12) What features within **The Fens** are liked or disliked, and why?

.....
.....
.....

13) On a scale of 1 - 5, how do **The Fens** rate as a visitor destination?

(circle appropriate number. 1= low, 5 = high).

1 2 3 4 5

14) Would you consider visiting the **WWT Welney Centre** or **The Fens** again? (please tick).

| | | | | | | | | | |
|--------------------------|------------|--------------------------|-----------|--------------------------|-----------------|------------|--------------------------|-----------|--------------------------|
| WWT Welney Centre | YES | <input type="checkbox"/> | NO | <input type="checkbox"/> | The Fens | YES | <input type="checkbox"/> | NO | <input type="checkbox"/> |
|--------------------------|------------|--------------------------|-----------|--------------------------|-----------------|------------|--------------------------|-----------|--------------------------|

If yes, why, or if not, why not?

WWT Welney Centre

.....

The Fens

.....

Visitor spend information.

15) Approximate spend per day (excluding accommodation):

| Up to £20 | £21 - £35 | £36 - £50 | £51 - £75 | £76 - £100 | Over £100 |
|-----------|-----------|-----------|-----------|------------|-----------|
| | | | | | |

16) Approximate spend on accommodation per night (if applicable):

| Spend per night | Number of nights |
|-----------------|------------------|
| £ | |

17) Approximate spend in preparation for this visit (i.e. before leaving home & including travel costs):

| Up to £25 | £26 - £50 | £51 - £75 | £76 - £100 | £101 - £150 | £151 - £200 | Over £200 |
|-----------|-----------|-----------|------------|-------------|-------------|-----------|
| | | | | | | |

Visitor demographics.

18) Number in party:

| Adult male | Adult female | Children |
|------------|--------------|----------|
| | | |

19) Number of persons in each age range:

| Under 10 | 11 - 15 | 16 - 24 | 25 - 34 | 35 - 44 | 45 - 54 | 55 - 64 | 65 + |
|----------|---------|---------|---------|---------|---------|---------|------|
| | | | | | | | |

20) Occupation of chief income earner of household:

(indicate one only)

| | |
|--------------------------------------|--|
| Employed full-time (30+ hrs/week) | |
| Employed part-time 8-29 hrs/week | |
| Working less than 8 hours per week | |
| Self-employed | |
| Retired with company/private pension | |
| Retired with State pension ONLY | |
| Unemployed - less than 6 months | |
| Unemployed - over 6 months | |
| Full-time student | |
| Declined to answer | |

Position/Job title:
*(as accurate as possible)*Combined family income *(please tick appropriate income range):*

| Up to £10,000 | £10,001 - £17,000 | £17,001 - £24,000 | £24,001 - £40,000 | £40,001 - £65,000 | Over £65,000 |
|---------------|-------------------|-------------------|-------------------|-------------------|--------------|
| | | | | | |

Travel.

21) Method of travel to the WWT Welney Centre & The Fens:

| | | | | | | | |
|----------|--|---------------------|------|--|--------------------------|--|-------------------------|
| By car | | By public transport | Bus | | By canal or river | | Other - please specify: |
| By coach | | | Rail | | By footpath or bridleway | | |

22) Method of travel within The Fens, if different from above:

| | | | | | | |
|-------|--|-------------------------|------|--|----------------------------------|--|
| Car | | Public transport | Bus | | Canal or river (boat/canoe etc.) | |
| Coach | | | Rail | | On foot | |
| Cycle | | Other - please specify: | | | | |

23) Please add any further comments on The Fens as a visitor destination if desired;

.....

.....

.....

.....

.....

.....

.....

.....

Thank you for completing the questionnaire.
Please return in the envelope provided.

S. DONCASTER
Room 1130, Owen Building
Faculty of Organisation and Management
Sheffield Hallam University, City Campus
Howard Street, Sheffield, S1 1WB

Telephone: 0114 2252988
e-mail: s.h.doncaster@shu.ac.uk

HHL Project VQ8.
WWT Welney 12 - 13 November, 2004.

Visitor survey questionnaire (non-specific, regional).

Humberhead Levels Project: Visitor Questionnaire.

All information provided will remain anonymous and confidential.

PLEASE TICK OR COMPLETE ALL APPLICABLE BOXES

Date:

- 1) Visitor's home town & post code:
- 2) Visitor attraction or facility where questionnaire obtained:
- 3) Number of visits to the Humberhead Levels before, if any:
- 4) Reason (s) for this visit:

| | | | |
|---------------------------|---------------------------|----------|------------------------|
| Holiday or pleasure visit | Visiting family & friends | Business | Other - please specify |
| | | | |

- 5) Length of stay:

| | | | |
|-----------|-----------------------|-------------------|---|
| Day visit | Weekend - short break | 4 nights & longer | If less than one day, how long (hours). |
| | | | |

- 6) If staying overnight, in what type of accommodation:

| | | | | | | |
|-------------------|---------------|-------------------------|-------------------|--------------------|-------------------|------------------------|
| B&B or guesthouse | Self-catering | Hotel; half-board (B&B) | Hotel; full board | Caravan or camping | Family or friends | Other - please specify |
| | | | | | | |

Is the accommodation on a working farm (*please tick*)

YES

NO

- 7a) Which of the following factors influenced the decision to visit the **attraction** specifically, and the **Humberhead Levels** generally, (*Tick all applicable categories*):

| | Attraction | | Humberhead Levels |
|---|------------|---|-------------------|
| Archaeological sites | | Archaeological sites | |
| Business trip | | Business trip | |
| Family & Friends | | Family & Friends | |
| Historic buildings | | Historic buildings | |
| Historic landscapes | | Historic landscapes | |
| Rural landscape/scenery | | Rural landscape/scenery: | |
| Hedgerows, trees & woodlands | | Hedgerows, trees & woodlands | |
| Water: rivers/canals/lakes | | Water: rivers/canals/lakes | |
| Wetlands | | Wetlands | |
| Farmland | | Farmland | |
| Wildlife - flora & fauna | | Wildlife - flora & fauna | |
| Quietness & Tranquillity | | Quietness & Tranquillity | |
| Use of attraction's cafe, shop, toilet | | | |
| Leisure activity - specify all: (e.g. fishing, equestrian, walking, food/restaurants/pubs etc.) | | Leisure activity - specify all: (e.g. fishing, equestrian, walking, food/restaurants/pubs etc.) | |

7b) Other reasons for visiting the **attraction & the Humberhead Levels**, if any - please specify: (e.g. quality of life, peace, relaxation, freedom, 'get away from it all', etc.)

.....
.....

8a) Was the number and variety of attractions within the **Humberhead Levels** a factor in your decision to visit the region? Please rate the importance of this on a scale of 1 - 5.
(circle appropriate number. 1= low, 5 = high).

1 2 3 4 5

8b) On a scale of 1- 5, how important was this **attraction** in your decision to visit the **Humberhead Levels**? (circle appropriate number. 1= low, 5 = high).

1 2 3 4 5

9) Other visitor attractions/sites visited locally:

.....
.....
.....
.....

10) Perceptions & expectations of the **Humberhead Levels** before visiting, if any, and opinions of the **Humberhead Levels** having visited:

.....
.....
.....
.....

11) How do the **Humberhead Levels** compare with other regions visited? Please list the main other regions visited.

.....
.....
.....
.....

12) What features within the **Humberhead Levels** are liked or disliked, and why?

.....
.....
.....
.....

13) On a scale of 1 - 5, how do the **Humberhead Levels** rate as a visitor destination?
(circle appropriate number. 1= low, 5 = high).

1 2 3 4 5

14) Would you consider visiting the **Humberhead Levels** again? (*please tick*).

| | |
|-----|--------------------------|
| YES | <input type="checkbox"/> |
|-----|--------------------------|

| | |
|----|--------------------------|
| NO | <input type="checkbox"/> |
|----|--------------------------|

If yes, why, or if not, why not?

.....
.....
.....
.....

Visitor spend information.

15) Approximate spend per day (excluding accommodation):

Don't know:

| Up to £20 | £21 - £35 | £36 - £50 | £51 - £75 | £76 - £100 | Over £100 |
|-----------|-----------|-----------|-----------|------------|-----------|
| | | | | | |

16) Approximate spend on accommodation per night (if applicable):

Don't know:

| Spend per night | Number of nights |
|-----------------|------------------|
| £ | |

17) Approximate spend in preparation for this visit (i.e. before leaving home & including travel costs):

Don't know:

| Up to £25 | £26 - £50 | £51 - £75 | £76 - £100 | £101 - £150 | £151 - £200 | Over £200 |
|-----------|-----------|-----------|------------|-------------|-------------|-----------|
| | | | | | | |

Visitor demographics.

18) Number in party:

| Adult male | Adult female | Children |
|------------|--------------|----------|
| | | |

19) Number of persons in each age range:

| Under 10 | 11 - 15 | 16 - 24 | 25 - 34 | 35 - 44 | 45 - 54 | 55 - 64 | 65 + |
|----------|---------|---------|---------|---------|---------|---------|------|
| | | | | | | | |

20) Occupation of chief income earner of household:

(indicate one only)

| | |
|--------------------------------------|--|
| Employed full-time (30+ hrs/week) | |
| Employed part-time 8-29 hrs/week | |
| Working less than 8 hours per week | |
| Self-employed | |
| Retired with company/private pension | |
| Retired with State pension ONLY | |
| Unemployed - less than 6 months | |
| Unemployed - over 6 months | |
| Full-time student | |
| Declined to answer | |

Position/Job title:
(as accurate as possible)

Combined family income:

Don't know:

| Up to £10,000 | £10,001 - £17,000 | £17,001 - £24,000 | £24,001 - £40,000 | £40,001 - £65,000 | Over £65,000 |
|---------------|-------------------|-------------------|-------------------|-------------------|--------------|
| | | | | | |

Travel.

21) Method of travel to the attraction & the Humberhead Levels:

| | | | | | | | |
|----------|--|---------------------|------|--|--------------------------|--|-------------------------|
| By car | | By public transport | Bus | | By canal or river | | Other - please specify: |
| By coach | | | Rail | | By footpath or bridleway | | |

22) Method of travel within the Humberhead Levels, if different from above:

| | | | | | | |
|-------|--|-------------------------|------|--|----------------------------------|--|
| Car | | Public transport | Bus | | Canal or river (boat/canoe etc.) | |
| Coach | | | Rail | | On foot | |
| Cycle | | Other - please specify: | | | | |

23) Please add any further comments on the Humberhead Levels as a visitor destination if desired;

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Thank you for completing the questionnaire.
Please return in the envelope provided.

S. DONCASTER
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Sheffield Hallam University, City Campus
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HHL Project VQ7
Humberhead Levels. 21 June, 2004.

Humberhead Levels Project: Recreation Facility/Business Questionnaire.

All information provided will remain anonymous and confidential.

PLEASE TICK OR COMPLETE ALL APPLICABLE BOXES

Date:

1) RECREATIONAL FACILITY/BUSINESS DETAILS.

Proprietor/Facility/Business name:

Address (for record purposes only, not for publication. Leave blank if preferred):

| | |
|----------|--|
| Street | |
| Town | |
| County | |
| Postcode | |

| | |
|-----------|--|
| Telephone | |
| Fax | |
| e-mail | |

Type of facility:

| | | |
|------------------------|-------------------------|------------------------------------|
| Profit making business | Not for profit business | Public service e.g. visitor centre |
| | | |

| | | | | |
|----------------|---------|-----------|---|---|
| Owner operated | Manager | Franchise | National or International company chain | Government-Local Authority-tourist board operated |
| | | | | |

Other - please specify:

If not owner operated, location of HQ of parent company/organisation:

Year facility established or acquired:

Nature of facility/recreation activities or experiences offered (list all):

(e.g. visitor centre, historic attraction, pub, walking tours, bird watching, garden centre, off-road driving etc.).

Please indicate if activities are guided, non-guided/formal or informal.

PRINCIPAL ATTRACTION:.....

OTHER OR SECONDARY ATTRACTIONS:

2) OPENING PERIOD & VISITOR NUMBERS.

Facility/business opening period:

| | | |
|----------|-----------------|--------------------------------|
| All year | Easter - Autumn | Other - please specify |
| | | e.g. Easter/Christmas festival |

When open, is the facility/business open all or part of the day?

| | | |
|----------------------------------|---------------|-------------------|
| Opening times & days of the week | Hours per day | No. days per week |
| | | |

Number of visitors per year (estimated);

| | | | |
|--------|--|------------|--|
| Paying | | Non-paying | |
|--------|--|------------|--|

3) MARKETING & VISITOR NUMBERS

a) What aspects of the attraction are used as selling points to attract visitors specifically to the recreation facility/business, and b) what aspects of the Humberhead Levels are used as selling points to attract visitors to the region?

a)

.....

.....

b)

.....

.....

Marketing methods used (please tick all applicable):

| None | Leaflets | Magazine/newspaper advertising | Radio & Television | Local visitor business networks | Via local tourist board | Internet | Other - please specify: |
|------|----------|--------------------------------|--------------------|---------------------------------|-------------------------|----------|-------------------------|
| | | | | | | | |

Has the business undertaken any market research? If so, what type? If not, why not?

.....

.....

.....

.....

.....

What visitor interests do you predominately market your business to, if any (please tick all applicable)?

| | |
|---|--|
| Outdoor & adventure/sports activities (walking, horse riding, cycling, sailing etc.) | |
| Culture (archaeology, historical buildings and characters, myths, legends etc.) | |
| Wildlife and natural history (e.g. bird watching, rural landscapes, woodlands, water, wetlands) | |
| Sportsmen (fishing, shooting etc.) | |
| Local produce and markets. | |
| Family activities | |
| Other -please specify; | |
| Passing trade & non-specific marketing | |

Visitor categories marketed to, if applicable:

Please tick all applicable.

Visitor category:

| No preference | Adults with children (traditionally 'families') | | Singles - Couples (either not parents or with no accompanying children) | | | Other - further description |
|---------------|---|------------------|---|---------|---------|-----------------------------|
| | Young children | Teenage children | 18 - 30 | 31 - 55 | Over 55 | |
| | | | | | | Please specify: |

Length of stay marketed for:

| No preference | Day-visitors | Weekend - short break visits | 4 nights & longer |
|---------------|--------------|------------------------------|-------------------|
| | | | |

Approximate proportion (%) of visitor make-up:

Unknown:

| Adults with children (traditionally 'families') | | Singles - Couples (either not parents or with no accompanying children) | | | Other - further description |
|--|---------------------|---|---------|---------|--|
| Young children | Teenage children | 18 - 30 | 31 - 55 | Over 55 | |
| % | % | % | % | % | Please specify: % |

Approximate proportion (%) of length of stay:

Unknown:

| Day- visitors | Weekend- short break visits | 4 nights & longer |
|------------------|--------------------------------|----------------------|
| % | % | % |

Has the facility or business the capacity to accept more visitors?

YES

NO

Are more visitors desirable?

YES

NO

If more visitors are not desirable, why not?

.....

4) ENVIRONMENTAL ASSETS.

What 'environmental assets' does the recreational facility/business offer which are a factor in its existence and operation: Tick main applicable categories.

| Grassland | Arable land | Woodland | Hedgerows & trees | Water: rivers/canals/lakes | Wetlands | Wildlife |
|--------------------------|--------------------------|--------------------------|--------------------------|-------------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

| Historic landscapes | Archaeological sites | Unmanaged, scrubland | Other - please specify: |
|--------------------------|--------------------------|--------------------------|-------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |

5) VARIETY OF ATTRACTIONS & COLLABORATION.

How important is a variety of attractions in encouraging visitors to a) the recreation facility/business? and b) the Humberhead Levels generally? Please rate on a scale of 1 to 5.

(Circle appropriate figure. 1 = low, 5 = high).

a) Variety of attractions at the recreation and visitor facility: 1 2 3 4 5

b) Variety of attractions in the Humberhead Levels generally: 1 2 3 4 5

Please list the key, local visitor facilities and attractions important to your business in attracting visitors to the business and the Humberhead Levels generally:

.....

Is there any collaboration with the visitor facilities and attractions listed YES

NO

If yes, please indicate in what manner collaboration exists:

| | |
|---|--|
| Joint marketing/publicity | |
| Displaying leaflets of other attractions | |
| Discounts for visitors to collaborating attractions | |
| Discounts to or from local suppliers | |
| Informal sharing of visitors via recommendation etc. | |
| Membership of local tourism group - please specify; | |
| Membership of national tourism organisation - please specify; | |

6) RECREATIONAL FACILITY OR BUSINESS SERVICES PROVIDED.

Services provided at the recreational facility/business:

Please tick all applicable.

| Café | Toilets | Shop | Car parking - No. of spaces (approx): | Accommodation & No. of bed, caravan or tent space etc. | Other - please specify: |
|------|---------|------|---------------------------------------|--|-------------------------|
| | | | | | |

Entrance fee charge: £

| Yes | No | Per person | Children | Family | Groups/school parties | Concessions | Membership |
|-----|----|------------|----------|--------|-----------------------|-------------|------------|
| | | £ | £ | £ | £ | £ | £ |

Car park charge:

Car park charges: £

| Yes | No |
|-----|----|
| | |

| Car | Coach | Motorcycle |
|-----|-------|------------|
| £ | £ | £ |

Number of vehicles per year:

| Car | Coach | Motorcycle | Unknown |
|-----|-------|------------|---------|
| | | | |

Access & transport routes to recreational facility/business:

Please tick all applicable.

| By car | By public transport | By canal or river |
|----------|---------------------|--------------------------|
| | | |
| By coach | By Bus | By footpath or bridleway |
| | | |
| | By Rail | |
| | | |

7) PRINCIPAL REVENUE EARNER.

What is the principal revenue earner at the recreation facility/business?
 Please tick. If principal revenue value is common to two or more categories, please indicate all appropriate categories.
 ▲NOTE: 'OTHER' ATTRACTIONS EXCLUDES CAFÉ, SHOP & ACCOMMODATION.

| Principal attraction | Other▲ attractions - combined revenue: | Café | Shop | Car park | Accommodation |
|----------------------|--|------|------|----------|---------------|
| | | | | | |

Estimated percentage of revenue earned from each category:

| Principal attraction | Other▲ attractions - combined revenue: | Café | Shop | Car park | Accommodation |
|----------------------|--|------|------|----------|---------------|
| % | % | % | % | % | % |

8) STAFF, EMPLOYMENT & TRAINING.

Number of permanent staff:- full-time: part-time:
 Number of temporary staff:- full-time: part-time:

| time of year temporary staff employed: <i>Please tick all applicable.</i> | Spring | Summer | Autumn | Winter | Varies |
|--|--------|--------|--------|--------|--------|
| | | | | | |

Approximate number or percentage of local*/non-local staff: local: non-local:
 *living within 5 mile radius of business. % local: % non-local:

Do you require or provide any staff training? If so, what?

Is a lack of trained or skilled staff a barrier to your business:
 a) day-to-day operation;
 b) development;

9) LOCAL & NON-LOCAL GOODS & PRODUCTS SOLD.

a) Locally produced or manufactured products:

Do you sell or provide locally produced or manufactured products?+ YES NO

+e.g. food & drink products, including B&B/café/restaurant meal ingredients, local crafts etc., produced within a 30 mile radius

If yes, what proportion of products sold or provided are locally produced or manufactured?

| less than 10% | 11 - 20% | 20 - 30% | 31 - 40% | 41 - 50% | over 50% |
|---------------|----------|----------|----------|----------|----------|
| | | | | | |

b) What proportion of your supplies are locally sourced*?
 *Sourced within a 30 mile radius

| less than 10% | 11 - 20% | 20 - 30% | 31 - 40% | 41 - 50% | over 50% |
|---------------|----------|----------|----------|----------|----------|
| | | | | | |

10) GRANTS.

Have you received any financial assistance in the form of Government or Agency grants? Which grants and were they critical in the establishment of the business, (i.e. in the form of financial assistance)?

.....

11) TURNOVER ESTIMATE.

(optional, confidential information & not for publication).

Turnover estimate (£): *Please circle appropriate turnover range.*

| | | | | |
|------------------|-----------------|-------------------|-------------------|-------------------|
| less than 10,000 | 20,001 - 50,000 | 75,001 - 100,000 | 150,001 - 200,000 | 250,001 - 500,000 |
| 10,001 - 20,000 | 50,001 - 75,000 | 100,001 - 150,000 | 200,001 - 250,000 | over 500,000 |

12) INCOME PROPORTION. *(Go to question 13 if not applicable, e.g. manager/national chain).*

Is the recreation facility/business a sole or secondary source of income? *(Tick applicable).*

Sole income source: Secondary income source:

If the sole income source, please go to question 13.

If the recreation facility/business is a secondary source of income, what is the proportion of income from the recreational facility/business compared to total household income?

| | | | | | |
|---------------|----------|----------|----------|----------|----------|
| less than 10% | 11 - 20% | 20 - 30% | 31 - 40% | 41 - 50% | over 50% |
| | | | | | |

How important is the income from the recreation facility/business to overall household income?

.....

Please rate the importance on a scale of 1 - 5? *(Circle appropriate figure. 1 = low, 5 = high.)*

1 2 3 4 5

How, and in what way, would the loss of this secondary income affect household income?

.....

What are the main or other sources of earned income, if any?

.....

13) REGIONAL CONSIDERATIONS, IMAGE AND PERCEPTIONS.

How would you describe the image and perception of the Humberhead Levels as a visitor destination, and what comments do visitors make with respect to their visit to the Humberhead Levels?

.....
.....
.....
.....
.....

Suggestions as to how more visitors could be attracted to the Humberhead Levels, if considered desirable. Would increased marketing and a higher public profile of the Humberhead Levels be a benefit or detriment?

.....
.....
.....
.....
.....



14) Please add further comments on the Humberhead Levels as a visitor destination if desired.

.....
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.....
.....
.....
.....
.....
.....

Thank you for completing the questionnaire.
Please return in the envelope provided.

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HHL Project RBQ7.
Humberhead Levels. 1 July, 2004.

Farm recreation-business follow-up survey.

Follow-up farm recreation-visitor income survey. (By telephone).

Business details (For reference only. Not for publication);

| | |
|-----------|--|
| Name | |
| Address | |
| Phone | |
| e-mail | |
| Farm type | |

Q1) Type of recreation business;

.....

Q2) Is your farm a working farm? YES NO
 If no, please return questionnaire. If yes, please complete questions 3 to 7.

Q3) If yes, on a scale of 1 to 5, how important is the recreation/visitor-derived income to overall household income. Please circle appropriate rating.

| | | | | |
|----------------------|--------------------|----------------------|----------------|---------------------|
| Not at all important | a little important | moderately important | Very important | Extremely important |
| 1 | 2 | 3 | 4 | 5 |

Q4) What is the proportion of income from the recreational/visitor facility/business compared to total household income? Please tick appropriate category.

| | | | | | | | | | |
|---------------|----------|----------|----------|----------|----------|----------|----------|----------|-----------|
| less than 10% | 11 - 20% | 20 - 30% | 31 - 40% | 41 - 50% | 51 - 60% | 61 - 70% | 71 - 80% | 81 - 90% | 91 - 100% |
| | | | | | | | | | |

Q5) How, and in what way, would the loss of this secondary income affect overall household income?

| | | | | |
|------------|----------|------------|---------|----------------------|
| Not at all | A little | Moderately | Greatly | Drastically/severely |
| 1 | 2 | 3 | 4 | 5 |

Any other comments;

.....

Q6) What is the approximate overall turnover of the farm and recreation/visitor businesses combined?

| | | | | |
|-------------------|-------------------|--------------------|--------------------|--------------------|
| less than £10,000 | £20,001 - £50,000 | £75,001 - 100,000 | £150,001 - 200,000 | £250,001 - 500,000 |
| £10,001 - £20,000 | £50,001 - £75,000 | £100,001 - 150,000 | £200,001 - 250,000 | over £500,000 |

Q7) Has this secondary, recreation/leisure-based income increased or decreased in importance recently, and how do you foresee its importance in the future?

.....

May, 2005.

Themes for semi-structured interview questions.

Interview date:

Interview location:

Interviewee:

Organisation:

- Accommodation, infrastructure, visitor facilities
- Benefits of local involvement - local produce
- Benefits to local, rural economies - increased income sources/diversification?
- Conflicts between visitors & locals, between waterways use & fisherman, conservation issues, differing demands on resources, land use etc.
- Do attractions outside of the area (e.g. Chedder Gorge, Wookey Hole, the Quantocks etc.) increase the numbers of visitors (e.g. into the Somerset Levels?)
- Funding - grants etc. Policy implementation/difficulties/conflicts of policy
- Grants/subsidies etc. to encourage landowners to diversify, grow different crops - are they effective & worthwhile?
- Importance of pleasant, managed, 'natural'/agricultural environment for visitors
- Importance of the canal/river/footpath network in attracting visitors
- Importance of wetlands and wildlife to visitors
- Marketing of the Fens/Somerset Levels & Moors/Humberhead Levels
- Overall visitor benefits to local economy?
- Policy/views on tourism/visitors, with respect to landowners/farmers
- Potential problems of encouraging visitors - too many, damage, vandalism, theft, detriment to the environment, etc.
- Public perception of the Fens/Somerset Levels & Moors/Humberhead Levels. Good/bad? How to change?
- Suggestions to encourage visitors? How do you go about attracting visitors to the area? What is the 'selling point' (points) of the area?
- Trade off between agricultural production, tourism and environmental benefits?
- View on tourism/visitors. Are visitors wanted?

¹⁸ Interview questions varied depending on the organisation and area of expertise of the interviewee.