

REVIEW OF NATURE BASED TOURISM SITES IN THE SOUTH OF SCOTLAND

Phase 2

Final Report



Prepared for:

'Making Tracks' Steering Group

Prepared by:

**Dunira Strategy
and
The Borders Foundation for Rural Sustainability**

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Acknowledgements

This report is based on a large number of site visits and conversations with representatives of individual attractions (established, emerging and proposed), including farmers and public and private operators, along with area tourist boards, environmental and heritage agencies, educational organisations and marketing groups throughout and beyond the region. The range and enthusiasm of these contributions illustrates the size of the opportunity for the development of Nature Based Tourism in the south of Scotland, but at the same time indicates the criticality of broad stakeholder engagement and consultation in the development process. It must be stressed that this project has been achieved as a result of the goodwill and commitment of stakeholders throughout the region; it should be noted that, if the lead agencies proceed quickly to implement the recommendations, this climate of collaboration could help to ensure a foundation for success. The authors' key message is that **partnership and collaboration mitigate risk and competition in this particular sector of rural tourism and indeed add value to the very products that individual operators wish to market.**

The preliminary raw data was collected, researched, assessed and formatted by the following individuals. However any omission or error in the review and analysis of this data is entirely due to Dunira Strategy and The Borders Foundation for Rural Sustainability, which together are responsible for all the project outputs and recommendations.

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Appendix A is a corrected version of the presentation by Dunira Strategy and The Borders Foundation for Rural Sustainability to the 'Making Tracks' Steering Group in Peebles in June 2003.

Appendix B is derived from the phase 1 review of data sources that included original work done by students of the University of Glasgow Crichton Campus and Jacqui Hottinger's earlier research for The Southern Uplands Partnership.

Appendix C was produced with the assistance of Solway Heritage and the Scottish Borders Biological Records Centre.

Photographs throughout this report to illustrate the project were expertly sourced and supplied by Derek Marlborough at Dumfries & Galloway Tourist Board and Amanda Goller at Scottish Borders Tourist Board.

- DGTB: p.1 (scenery around Carsphairn) and p.11 (pony trekking near Moffat)
- SBTB: p.16 (shopping in the Borders), p.22 (Neidpath Castle, Peebles), p.30 (local cheeses)

It is recommended that this phase 2 report be read in conjunction with the project's phase 1 report,¹ which summarises the survey methodology and site selection criteria applied in phase 1 and includes an analysis of preliminary results.

¹ *A Review of Nature Based Tourism sites in the south of Scotland Phase One*, May 2003.

SUMMARY

0.1 Analysis

This Review's first phase led by The Borders Foundation for Rural Sustainability included a survey of existing and potential Nature Based Tourism (NBT) sites in the south of Scotland and built on previous research in the region. This exercise, which identified, described and mapped NBT sites throughout the region, confirmed that the south of Scotland is rich in natural heritage, flora and fauna, beautiful scenery and an extraordinary diversity of attractions, representing the raw ingredients of a tremendous range of NBT products.

Earlier research by NFO System Three and Dunira Strategy into consumer demand for NBT showed that the primary target markets for the Dumfries and Galloway and Scottish Borders Tourist Boards are motivated less by nature and wildlife and more by choice and range. The *experience* of NBT is more important than the *product*. Although as a result of experiencing NBT, visitors might develop a specialist interest, such as ornithology, the vast majority of visitors are non-specialist and they are likely to always remain generalists. Therefore the appropriate marketing response is to develop broad-spectrum products that will be attractive to as many people as possible.

The background to this Review is that there are many NBT sites that could potentially benefit from 'Making Tracks' support, but which are not immediately viable on their own, perhaps because they lack broad appeal or are not sufficiently significant as attractions in their own right.

This second phase led by Dunira Strategy has therefore developed the concept of a NBT cluster. In order to facilitate the development of NBT generally and to optimise the benefit of the 'Making Tracks' scheme in particular, the team has developed a new methodology. This will allow some of the less viable product ideas to be developed into quality NBT products by associating them with marketable products - clusters.

An analysis of the 67 clusters originally identified in phase 1 has produced a final set of 61 proposed clusters across the region. These all include a range of products to the visitor (offering an average of 3.9 with a standard deviation of 1.4). As an integrated product, this makes each cluster more attractive and accessible to a much greater range of visitors and, perhaps more importantly, groups of visitors.

Within each cluster the project has tried to identify a single *anchor* site. An ideal anchor meets three criteria.

- a) It has pulling power in its own right
- b) It has relevant accessible facilities (eat, sleep, wash)
- c) It has the management infrastructure to facilitate the development of a wider cluster

Clusters have been defined with their development in mind, making the anchor a key element. In practice an *anchor* might be composed of three separate sites, e.g. (a) the *Big House*, (b) the local town, and (c) someone from within the local community that has tremendous vision and energy.

A strong *honey pot* site with independent pulling power can through association draw out adjacent more marginal sites and at the same time itself be considerably enhanced in turn. Research indicates that the availability of appropriate and accessible facilities (to eat, sleep and wash) is

critical to visitors' enjoyment. But the third anchor element is perhaps the most important for the foundational development of a cluster to be achieved and thereafter be sustained.

The greatest opportunity to develop a cluster is where there is the will and enthusiasm on the ground. Any development initiative and energy should therefore be focused here.

This phase of the project is therefore presenting a framework for development, rather than making specific recommendations as to which clusters the Steering Group should focus its efforts on, other than to suggest that any prioritisation should be determined as a function of will and enthusiasm.

These recommendations will provide a practical framework for the development of a range of marketable NBT products, based on the tourism resources available in the south of Scotland.

0.2 Marketable Products

Eleven NBT products or product groups are represented in 61 geographic clusters across the region.

The NFO/Dunira consumer research demonstrated the principle that the *average* visitor is attracted more by the number and range of products available in a destination, than by the particular products on offer. Urban-based UK consumers (the primary target market) are non-specialists that want to be "in the countryside" (Empty Nesters) or "out of the city" (Young Independents), but without necessarily having too clear an idea of what *the countryside* actually is. The research showed that the idea and experience of the countryside is a greater motivator than the products themselves.

These eleven products therefore reflect the diversity of NBT resources in the south of Scotland and present a marketing opportunity for the two Area Tourist Boards (ATBs). These products also provide a framework for thematic marketing, promoting cross-fertilisation between clusters and across the region, presenting additional integrated marketing opportunities.

- Nature Walks
- Heritage Trails
- Wild Walking
- Craft Trails
- Farm Trails
- Cycle Routes
- Scenic Drives
- Equestrian Activities
- Llama Treks
- Boat Trips
- Water Sports

0.3 Action Plan

The first phase of this Review concluded that:

"The development of the NBT resource needs to be a localised exercise of exploring the clusters and their sites, unearthing the stories and nurturing the local providers and facilitators."

The following 17 specific recommendations, which reflect those themes presented in Appendix A, are designed to support this approach and deliver enduring results. The order does not in any way imply priorities.

- (a) Develop a more inclusive marketing framework, requiring ATB members to support each other and recognise the value of being part of a much larger *family*.
- (b) Encourage more robust reciprocal arrangements for promotion of adjacent sites and tourist boards, even if not *natural* partners.
- (c) Develop and promote regional admissions policies that reward visitors arriving on foot or by bicycle, bus or train - without penalising less mobile and disabled visitors.
- (d) Actively engage with public transport providers to establish a more integrated marketing framework.
- (e) Promote the Green Tourism Business Scheme to new and existing tourism providers to encourage environmental responsibility and good business management.
- (f) Encourage community engagement through consultation on new tourism developments.
- (g) Encourage integrated supply chains by facilitating showcases of local suppliers.
- (h) Rigidly apply criteria for anchor requirements.
- (i) Consistently apply guidelines for good management and development of clusters.
- (j) Facilitate meetings within each cluster to explore opportunities for sites to collaborate.
- (k) Concentrate support on those clusters demonstrating that they have the most will and enthusiasm - this can often be more important than the natural resources they are trying to promote.
- (l) Identify local *champions* and *experts*. Train them, support them and facilitate dialogue with representatives of other clusters.
- (m) Utilise any funding resources available to facilitate cluster development, even if they are not focused precisely on the target markets. To avoid loss of momentum, it is critical to get the clusters established as quickly as possible. This will also provide evidence of success to others.
- (n) Make appropriate integration with local supply chains mandatory for grants and other assistance.
- (o) Identify local *characters*. Train them as trainers to ensure long term sustainability and facilitate cross fertilisation between clusters.
- (p) Promote cycling as a feature of all new tourism initiatives, making sustainable transport policy a key element of sustainable tourism strategy.
- (q) Make appropriate partnerships with local schools mandatory for grants and other assistance.

There is an underlying requirement that any NBT product being developed must satisfy consumer demand, if ATBs are to be able to support its promotion and to establish marketing links and facilitate partnerships with other tourism resources. However, within an integrated NBT framework, some of the most unlikely initiatives could make a real contribution to tourism in the south of Scotland.

These 17 recommendations can be summarised in the following five objectives, which should apply to any NBT product being developed with Scottish Enterprise support through the 'Making Tracks' programme and consequently be owned by the 'Making Tracks' Steering Group:

- Development and Sustainability:
 - That each ATB appoints and maintains its own *Cluster Development Officer*, who within twelve months should facilitate preliminary local meetings for at least 50% of the clusters and identify an appropriate local *champion* for each, supporting them as necessary to ensure implementation of the cluster guidelines - albeit with local expression.

- Context and Integration:
 - That all NBT products in development should identify local facilities and attractions with geographic and thematic links with a view to developing reciprocal marketing arrangements.
 - That all goods and services required for the development and maintenance of NBT products are, as far as possible, sourced locally to build local capacity and contribute to economic regeneration and integration, specifically between tourist attractions and other community resources and between tourism, agriculture, local crafts and trades.
 - That ATBs should adopt plans to make the implementation of such policies within two years a mandatory requirement of all their members.

- Education:
 - That all NBT products in development include an appropriate community education programme in their business plans.
 - That ATBs should adopt plans to make the implementation of such a programme within eighteen months a mandatory membership requirement for all their visitor attractions.

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DEFINITIONS

"Wildlife tourism covers visits to natural wildlife habitats or watching wildlife on land and/or sea".²

"Ecotourism is a form of nature-based tourism which involves responsible travel to relatively undeveloped areas to foster an appreciation of nature and local cultures, while conserving the physical and social environment, respecting the aspirations and traditions of those who are visited, and improving the welfare of the local people."³

"Sustainable tourism is tourism which actively fosters appreciation and stewardship of the natural, cultural and historic resources and special places by local residents, the tourism industry, governments and visitors. It is tourism which can be sustained over the long term because it results in a net benefit for the social, economic, natural and cultural environments of the area in which it takes place."⁴

Sustainable development is "development that meets the needs of the present without compromising the ability of future generations to meet their own needs".⁵

Nature Based Tourism uses natural heritage sites and resources as a focal point to attract visitors to a particular community, sometimes linking these attractions with established tourism sites to enhance them through geographic and/or thematic association. The purpose of a visit can include both education and entertainment. Resources can be natural or man made, but they must be managed in a sustainable way for the present and future benefit of visitors, the tourism industry, the host community and its environment.⁶

² Definition adopted by VisitScotland and published on the Scottish tourism industry website (www.scotexchange.net).

³ Definition adopted by the Fiji Ecotourism Association (FETA).

⁴ This definition of "sustainable tourism" was proposed by Parks Canada and is now gaining currency in other parts of the world through the work of Dunira Strategy and other organisations with a commitment to sustainable tourism.

⁵ This has become the standard definition of "sustainable development", universally adopted following publication of The Bruntland Report (The World Commission on Environment and Development: *Our Common Future*, 1987).

⁶ Developed by Dunira Strategy in response to a request by the Steering Group to provide a standard definition of NBT.

1.0 BACKGROUND

Tourism contributes £204M to the economy of the south of Scotland⁷ and directly employs 10,774 people within the region or 8% of the total workforce.⁸ It has been calculated that the countryside management industry, which includes rural nature based tourism (NBT) and the realisation of nature based resource through country sports contributes £41M to the Borders alone,⁹ which compares with agriculture (£98M) and forestry (£23M).

The outbreak of Foot & Mouth Disease (FMD) in February 2001 was initially seen only as a severe problem for the farming industry. By the end of the outbreak there had been 187 confirmed cases of FMD in Scotland, of which 176 (94%) were within Dumfries & Galloway and 11 (6%) were in the Scottish Borders. But the widespread media coverage of the culling of livestock and restrictions on access served to reduce the inherent appeal of the countryside as a holiday destination. The result was that, compared to the previous year, the number of tourism visitors fell by 24%, although the average spend per person actually increased by 11% as there was a shift from recreational walking towards visits to built heritage attractions and more controlled rural activities. This quickly demonstrated an important link between farming and tourism.

A number of organisations, including the Southern Uplands Partnerships, identified this link in the management and enjoyment of natural heritage and have consequently been working on the development of NBT in the south of Scotland. One of the region's main resources is the high quality and diversity of its natural heritage, which is itself largely dependent on the pattern of agriculture and land use. An unexpected consequence of the FMD outbreak was the recognition within government that in natural heritage there is a strong relationship between farming (as custodians) and tourism (as visitors and supporters).

As part of their efforts to help the rural communities recover from the impact of the FMD outbreak, the Scottish Executive decided to develop the concept of sustainable tourism generally and NBT products in the south of Scotland in particular. The focus was on Dumfries & Galloway and the Scottish Borders, as these had been most effected by FMD. This led to the establishment of a Steering Group with representatives from VisitScotland, the National Farmers Union of Scotland (NFUS), Scottish Natural Heritage (SNH), Tourism and the Environment Forum (TEF) and the two Area Tourist Boards (ATBs), Local Enterprise Companies (LECs) and Local Authorities (LAs). This Group's objective was to develop links between farming and sustainable NBT in the south of Scotland and in March 2002 it commissioned NFO System Three and Dunira Strategy to undertake a programme of consumer research.¹⁰ The main aim of this research was to inform the Steering Group of how to progress the product development and marketing of the NBT product.

The Group consequently established the 'Making Tracks' Grant Scheme, which aims to encourage stakeholder groups that bring together farmers (including tenants), land-based businesses and other rural enterprises to develop a network of sustainable NBT tourism products across the South of Scotland. The scheme is targeted at all rural stakeholders, including farmers, landowners and land managers who occupy and have control over land and inland water within the Dumfries & Galloway and Scottish Borders Council areas, and forms part of the 'Making Tracks' Project, the objectives of which are:

- a) To improve links between tourism businesses, farming and the environment;
- b) To identify opportunities for enjoying at first hand the region's natural habitats, flora and fauna;
- c) To enhance the experience of visitors to the area through improved access, interpretation and products;
- d) To contribute to the region's economic regeneration; and
- e) To establish and share best practice in the development of sustainable NBT.

An important finding of the recent research by NFO System Three and Dunira Strategy was that visitors are attracted by the opportunity to visit several tourism products at a time. With spontaneity being a primary

⁷ *UK Tourism Survey, 2001*. The "south of Scotland" is defined as the combined Local Authority areas of Dumfries & Galloway and the Scottish Borders.

⁸ *Census of Employment, 2000*.

⁹ The Borders Foundation for Rural Sustainability: *The Countryside Management Industry in the Scottish Borders: Sustainability and the pursuit of jobs and revenues, 2002*.

¹⁰ NFO System Three and Dunira Strategy: *Sustainable Nature Based Tourism*, June 2002.

motivator (particularly for the younger market), even if they only visit one or two sites in a particular area, visitors will tend to gravitate towards those areas that are rich in choice. This means that, unless it is truly exceptional, a NBT product needs to be part of a larger 'cluster' of tourism products if it is to be effectively marketed to visitors.

To date the scheme has received nearly thirty enquiries, of which the vast majority has come from Dumfries & Galloway, but very few led to the submission of an application and even less have been approved.

A Steering Group comprised of representatives from SUP, SNH, Scottish Enterprise and the project officer for 'Making Tracks' consequently appointed Dunira Strategy and The Borders Foundation for Rural Sustainability as consultants in February 2003. Their brief was to undertake a review of NBT in the south of Scotland and to recommend a range of product groups or clusters, against which the viability of candidate sites and project proposals can be assessed.

The challenge for a NBT strategy must be to achieve a balance between the requirements and expectations of visitors with those of the host community in a way that benefits both. It is not possible for public agencies to impose products on a target area, if these are to be developed in a sustainable way; the initiative must come from the host community. The role of such agencies is to facilitate, rather than to direct. Rather than simply defining product groups and associated marketing plans, the opportunity for the project is to take a step back into the natural environment of the south of Scotland and assess the potential resources available for tourism development. Only then will the natural clusters start to emerge. Comparing these 'natural' clusters to those product groups that consumer research has indicated are marketable has enabled the project team to determine a definitive list of marketable NBT packages for the south of Scotland. Having built the product groups "bottom-up" will make them more robust and help to ensure their sustainability.

As a consumer-led strategy based on the principle that it is variety and range (rather than specific products) that matter, the process has three key stages. Firstly to assess resources (physical, cultural, etc) at a grassroots level and secondly within a marketing framework to categorise these into products (to support thematic promotion) and group them into clusters (to facilitate geographic promotion). Having provided this analysis, the final opportunity is to identify specific local champions to lead development and subsequently to help facilitate implementation of their plans.

An earlier interim report¹¹ described some of the considerations involved and indicated five areas in which the project team expected to make recommendations. This final report links these themes to specific recommendations.

This report represents the culmination of six months work and the end of the final phase of the current project.

¹¹ *Review of Nature Based Tourism sites in the south of Scotland Phase 2 Preliminary Report*, May 2003.

2.0 CLUSTERS

The purpose of a cluster of Nature Based Tourism sites in the south of Scotland is to help promote the sustainable development of communities and contribute to the preservation of the wider environment in which they exist. This can be achieved through investment in human and social capital, including skills and networks, and a realisation of their own local heritage.

An effective cluster will bring together a range of facilities and attractions in a way that creates a marketable product and new visitor *experience*. The function of a cluster is to lure travellers away from such arteries as the A1, M74 or A75 and get them into secluded pubs, independent B&Bs and hotels and local shops and accessing transport services such as public buses and local cycle and car hire. The objective is emphatically not to undermine established sites, but rather to complement and even enrich them by giving them greater context and breadth. The aim is to present sites within clusters and to package these in a way that will motivate visitors to spend additional time in the region. A golfer or angler might be able to bring her/his partner to the countryside for a few days, but a couple is more likely to book in for that elusive extra night if s/he can be persuaded of the range of alternative pursuits and visitor attractions available.



Analysis shows that by encouraging just 5% (1 in 20) of domestic visitors on average to stay one single extra night (compared to the current 3-night average) would make a tremendous contribution to the regional economy. Such an outcome would generate an additional £3m of tourism revenue, grow the tourism market by 1.6% and directly support the creation of 127 incremental jobs in tourism. Persuading 20% (1 in 5) of domestic visitors to stay an extra night would generate £13m of additional revenue, grow the market by 6.2% and support 508 additional jobs. For an economy that employs only 99,000 people, such an opportunity is significant.

From a review of the enquiries received by the 'Making Tracks' scheme, it is clear that there is a number of good candidate sites, but it is also evident that many potentially good product ideas stand not to benefit because they are not immediately viable on their own. This may be because they are not sufficiently significant in their own right, are too specialist in their appeal or are not located in and around other major attractions. In order to optimise the benefits of the scheme, the Steering Group was keen to have a methodology that would allow some of these less viable product ideas to be developed into quality NBT products by associating them with other marketable products and building critical mass. It also wanted to identify product groups and categories against which new ideas can be evaluated and through which the less promising prospects can be implemented. Using a framework of clusters, this methodology and associated product recommendations have now been developed by the project team and are the content of this report.

Taking a lead from the recent NFO/Dunira research, the opportunity for individual sites is for them to be linked to other new and existing tourism products and attractions through clusters or product groups. These might be defined as geographical (eg "sites within a 15 mile radius of Hawick" or "sites just off the A75") or thematic ("mammals" or "birds"). There is scope for developing a cluster of sites around ancient battles or

one of the south of Scotland's cycling routes. The range is only limited by people's imagination and by what in practice is likely to be marketable.

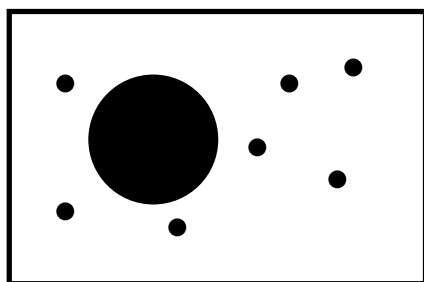
2.1 Framework

Clusters have been defined with their development in mind. The team has identified an anchor site in each cluster. Although the nature of the anchor depends on which model the cluster conforms to, an anchor must meet three criteria.

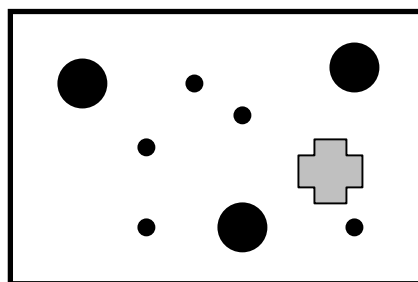
- a) It has pulling power in its own right
- b) It has relevant accessible facilities (eat, sleep, wash)
- c) It has the management infrastructure to facilitate the development of a wider cluster

In practice the *anchor* site might in fact be composed of three separate sites, for example (a) the Big House, (b) the local town, and (c) someone from within the local community that has tremendous vision and energy. The third anchor element is perhaps the most important. Although management infrastructure is critical, such inherent competencies must be supplemented with *will* - if any development is to be achieved.

Within this context, the team has identified two types of cluster. After some consideration, the two models have been termed "Tree cluster" (TC) and "Ring cluster" (RC) and are illustrated by the figures below.



Graphical representation of a "Tree cluster"



Graphical representation of a "Ring cluster"

2.1.1 Tree Cluster

A tree cluster is characterised as a cluster that has at its core a strong primary site (or combination of established visitor attractions), that can *lift* satellite sites. There is always the danger of taking analogies too far, but a single tree can disperse seeds and establish a wood that will in time protect the parent tree. Seedlings should be cultivated to the extent that they enhance the wider environment, whilst those that are not viable and make no contribution to the environment should not be artificially supported and should instead be allowed to wither naturally. But a new site or product idea should not be smothered simply for want of imagination; many doubted that remote viewing in North Berwick via CCTV cameras of birds on the Bass Rock would be the success that The Scottish Seabird Centre has become since opening in May 2000! The key challenge in the development of a TC is to engage the proprietors of the primary site and persuade them to adopt a leadership role in the marshalling and encouragement of satellite sites.

2.1.2 Ring Cluster

A ring cluster is characterised as a cluster that lacks a strong primary site. It may be that over time a strong anchor site will emerge and that the form of the cluster will change, but the key characteristic is one of disparate and often marginal sites that will only achieve marketability through collaboration. It is the Aristotelian maxim that "the whole is more than the sum of its parts".¹² The value of a ring is a function of the artistic design and technical achievement in the arrangement of the materials used and not simply a measure of ounces and carats. The association of sites in a RC is more an accident of geography than reflecting any uniformity or common theme. The key challenge in the development of a RC is therefore to

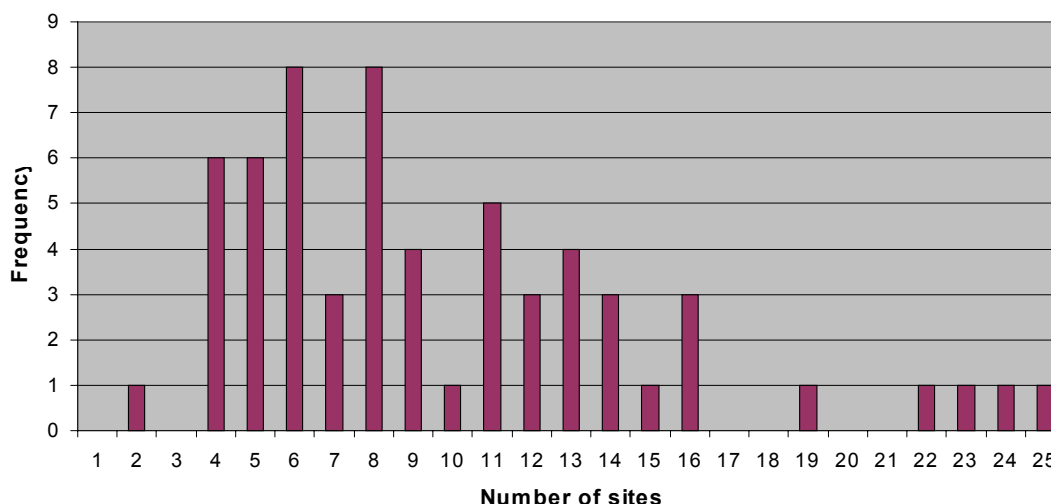
¹² Aristotle: *Metaphysics*.

promote a collaborationist spirit amongst individuals that might normally perceive each other simply as competitors. But it is through collaboration that these sites can achieve economies of scale, integrating with local supply chains and adding value to their collective package by presenting themselves as being plugged into a unique operating environment. By celebrating local linkages, they will not only benefit from the goodwill of local suppliers (who form a key element of their natural market and promotional structure), whilst reducing the negative impacts of transportation, but they will truly have a unique selling point, to which consumers will increasingly respond.

2.3 Cluster Review

The phase 1 survey of nearly a thousand individual sites identified 584 nature-based tourism sites and grouped these into 67 discrete clusters with 29 (43%) in the Scottish Borders (SB) and 38 (57%) in Dumfries & Galloway (DG).

A review of the proposed clusters resulted in one cluster being divided into two and seven pairs being merged, resulting in the proposal of 61 clusters across the region with 27 (44%) in the Scottish Borders, 33 (54%) in Dumfries & Galloway and 1 (2%) straddling the border. The number of sites has been increased by 12 to include anchor locations for those clusters that lack sufficient facilities and appropriate infrastructure at any one site. Therefore, including anchor locations, the average number of sites in a cluster is 9.8 with a range of 2 to 25 and a standard deviation of 5.3.



Of the 61 clusters, 24 (39%) are of the Tree type, whilst the remaining 37 (61%) are of the Ring type. Given the underdevelopment of NBT resources in the south of Scotland, it is perhaps not unexpected that most of the proposed clusters follow the more dislocated RC model.

As part of the methodology and on the basis of the NFO/Dunira research, the Project Team agreed with the Steering Group that the focus of cluster determination would be geographic. Given the non-specificity of the region's target markets for NBT, the primary aim must be initially to attract visitors to geographical areas, but a secondary purpose is to identify themes that can bind individual sites from different clusters together across the region. This will enable well-placed thematic indicators to act as sign-posts to other clusters in the region and help to encourage visitors (that might otherwise have moved onto an other region altogether) to stay a little longer or to return later to an other part of south Scotland.

Indicative themes might relate to various specialist activities, such as ornithology (eg raptor sites), fishing (eg great salmon rivers) or equestrian (eg stables). Those activities that have been developed tend to be well covered by dedicated brochures, whilst the interests of the more specialist markets are often represented by specific organisations and associated marketing groups. However sometimes the activities potential has not been developed at all and NBT must rely on the range of more mainstream products and local variety.

Other indicative themes might include various forms of association, including literary (eg Sir Walter Scott and Robert Burns), Christian pilgrimage (eg Saints Ninian and Cuthbert) and royal history (eg Robert Bruce and Mary Queen of Scots), which are more subtle, but often provide rich seams of interest for visitors. Often there will be local legends and stories associated with areas that won't be in any guidebook (perhaps because they are just local traditions!). But these tales really can bring out the vital fabric of an area and perhaps explain (or at least illustrate) surprising links with other areas of the region that would otherwise remain opaque, uncelebrated and inaccessible. The natural environment has always been a platform for heritage and in marketing terms it makes no sense to separate one from the other.

Themes have been used successfully in many places, including the south of Scotland, to promote tourism destinations. Regional examples of thematic guides that illustrate current practice are: *Cycling in the Scottish Borders*¹³, *Red Squirrels in South Scotland*¹⁴, *The Historic Links with Ireland*¹⁵, *Scottish Borders Arts & Crafts*¹⁶ and the two garden guides: *Dumfries & Galloway in Bloom*¹⁷ and *guide your senses*¹⁸. As niche promotional material, they are all very good and some are excellent. But, although some carry advertisements for additional sites that are not thematically related, the guides do not offer local context beyond the specific theme and fail to provide signposts to non-thematic information. Of course it is not the responsibility of special interest groups to take responsibility for the mainstream marketing of NBT, but this provides an indication of why tourism agencies cannot rely on strong regional themes to drive the promotion of NBT to mainstream consumers. In fact, as mainstream marketing tools, these publications are extremely restrictive and consequently represent a missed opportunity, since research indicates that context adds such critical value in consumer-led marketing of NBT. Indeed the key conclusion of the NFO/Dunira consumer research in 2002 is that it is the breadth of choice and diversity of experience that motivates NBT visitors.

¹³ The Scottish Borders Tourist Board

¹⁴ The Southern Uplands Partnership

¹⁵ The Institution of Civil Engineers

¹⁶ Scottish Borders Council

¹⁷ Dumfries & Galloway Tourist Board

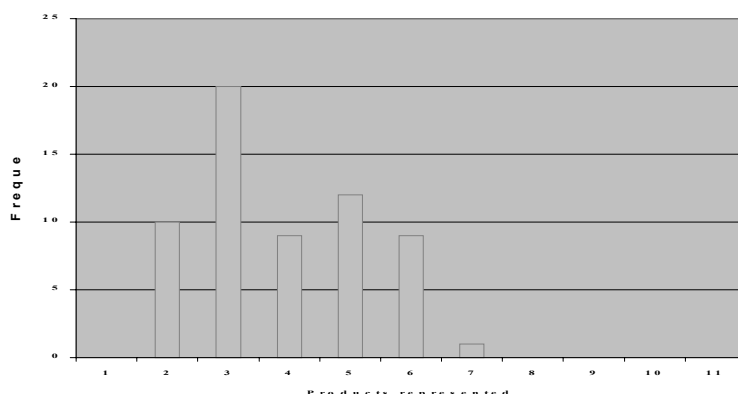
¹⁸ The Scottish Borders Tourist Board

3.0 MARKETING ANALYSIS

Eleven NBT products emerged from a review of the 61 clusters.

By reviewing the 61 geographical clusters and comparing these 'natural' clusters to those NBT product groups that consumer research indicated are marketable has enabled the project team to determine a definitive list of marketable NBT packages for the south of Scotland. Having built the product groups "bottom-up", rather than imposing an artificial marketing framework from above, will make them more robust and help to ensure their sustainability.

In terms of product distribution, the 61 clusters identified offer a range of between two and seven products with an average of 3.9 and relatively low standard deviation of 1.4, thus satisfying the consumer requirement to offer sufficient range and variety.



This section of the report will describe the eleven NBT products to have emerged from this review, whilst the appendices indicate which products we believe relate to each cluster.

3.1.1 Nature Walks

This is at the core of the NBT opportunity and is reflected in the number of walking routes available in the south of Scotland. Research shows that consumers like to visit the countryside, although they might have little or no knowledge of the natural heritage that they're experiencing. Consumers might be tempted to take a short walk from a car park to look at a view, but without realising that they are passing remarkable flora and fauna along the way. The opportunity therefore lies in sensitising visitors to the natural environment, helping them to appreciate how land management and natural history have both helped to shape the geography of the environment today. The target market is the ordinary non-specialist visitor that *wants to experience the countryside*. By harnessing this motivation, consumers will be encouraged to explore a little further and stay a little longer, having lunch at the local pub or buying a picnic from the local store. The challenge is to encourage landowners and managers to maintain and even promote access to their land and to facilitate the development of interpretative materials to support the enjoyment of local walks for the benefit of the wider community. There might only be limited opportunity for immediate commercial benefit, but promoting local access will help to sustain the local economy and community. Leading badger walks might generate a little income, but still requires some marketing expenditure, whilst the successful development of bird hides requires greater capital outlay. The development of nature walks is an essential ingredient of any NBT strategy, but will only acquire commercial value in the context of an integrated approach.

Therefore any NBT promotional material for one activity should also present an integrated snapshot of the range of other products available. One of the most popular and successful publications from the region is *Walking in the Scottish Borders*¹⁹, which promotes this most fundamental NBT product and includes details of useful local facilities with some references to related local heritage. But there is an opportunity to make future editions of similar publications less specialist by linking their content to other NBT products. Listings

¹⁹ Produced by SBTB and sponsored by Forest Enterprise.

should for instance include relevant publications on such complementary activities as cycling. Each walk description should ideally include brief information on alternative local activities to whet the appetite and stimulate those members of a party (or family) that may be less motivated by the idea of a walk - however relaxing a change of scenery might in fact be. Apart from broadening the appeal of NBT, this is a device that has been used elsewhere in the tourism industry to encourage the booking of *second* and/or *longer* holidays.

3.1.2 Heritage Trails

Natural heritage is to a large extent shaped by cultural, social, agricultural, industrial heritage. The popularity of pseudo-history programmes and drama documentaries on television and radio affirms the value of heritage as an entertainment medium. Whether it's stories about smugglers, border bandits, legendary saints or kings of old or locations in films and novels, a walk can be transformed from something that is an intellectually inaccessible experience into a personal communion with history or literature. Through simple interpretation, piles of stones can become the foundations of a neolithic settlement or the site of a lost industry, but without interpretation will remain an obstacle in a field and of no interest to the average visitor. The development of heritage trails needs active consultation with local experts that know the area back to front, know the local stories and know where to find rare flora and fauna and can draw out links with other sites and clusters. Again there is limited scope for direct revenue without wider integration.

3.1.3 Wild Walking

Of all the NBT products, this is perhaps the most accessible, in that it requires no incremental infrastructure. It is the freedom to roam and explore. The challenge is to minimise development and change, which itself requires control as part of a wider resource management plan, because all so-called Scottish wilderness areas are in reality closely managed environments.

3.1.4 Craft Trails

Crafts include cheese making and woodturning. They demonstrate that the countryside is productive and not simply a stage for holiday experiences. NBT should not be treated as an entirely discrete economic sector, but as something that encompasses those rural activities that can attract visitors and promote local enterprise. Unlike with local supply chains to food and accommodation providers, the production of craft goods gives visibility to local craftsmanship, adding a human and economic dimension to visits. Establishing a craft trail requires collaboration between suppliers and some investment for the development of promotional material. Capital can help to establish relevant facilities (eg car parking), but research elsewhere in the world shows that this can be offset in early years by encouraging collaboration with incoming tour operators.

3.1.5 Farm Trails

The target markets for NBT in the south of Scotland are urbanite. This means that farms and rural pursuits will generally be beyond their immediate everyday experience. With interpretation and guidance, farms can become engaging and accessible to visitors. Farms may be able to provide access to wildlife and other heritage sites (including archaeological), but it should not be assumed that farmers necessarily have the skills, resources or predisposition to facilitate such access. A positive effect of Foot & Mouth in the south of Scotland was that it demonstrated the capacity of farmers to work collectively. This can provide a

framework for collaboration between farmers and the creation of farm trails, whether by developing links between sites on each other's land or by pooling B&B facilities and establishing a marketing group. [Quad-biking and 4x4 trails are sometimes associated with farm trails, but these are not specifically being recommended by the authors, as such developments are capital-intensive and require detailed environmental impact assessments, as they are highly specialised and too often misconceived and poorly executed. Research has demonstrated that the consumer motivation is generally thrill seeking and is nothing about engaging with nature.]

3.1.6 Cycle Routes

On public roads and disused railway lines, bicycles are one of the most environmentally-friendly and health-promoting forms of transport and their use should be encouraged by establishing well-defined new routes and by developing better integration between them and other public transport and tourism facilities. Elsewhere, the poor management of mountain-bike facilities can lead to conflict with other countryside visitors, particularly walkers. Whilst there are environmental issues, Forest Enterprise (amongst others) have demonstrated that these can be managed for the benefit of all. Offering good cycling facilities can keep visitors in a region for longer and particularly attract younger visitors, a group that is critical to the sustainability of any tourism enterprise, whilst there are also significant opportunities for wider community integration through cycle hire schemes to schoolchildren.

3.1.7 Scenic Drives

If there's a road, there's a drive and in the south of Scotland it will often be scenic. The key opportunity is consumer access. The main reason for defining a scenic drive is that it provides a means for the less mobile consumer to access NBT, which is becoming increasingly important for an ageing population. Although not a target market, with good planning, a scenic drive can also be promoted to coach parties with minimal environmental impact - achieving growth in total visiting numbers, whilst minimising their footprint on sensitive sites and limiting total road traffic. Such initiatives can also help to preserve remote pubs and create opportunities for new enterprises, perhaps linking drives to craft trails. Identifying facilities and other NBT enterprises to associate with a scenic drive will make the drive itself more marketable and bring real local benefits.

3.1.8 Equestrian Activities

These can range from donkey rides at a village fair to a 5-day horseback trek across the region, but also includes the provision of livery for visitors' use, which of course requires advertising. The Scottish Borders has a particularly good brochure covering this sector, but there is an opportunity to explore more extensive regional routes and to integrate these activities with all other NBT initiatives to make them seem a more normal part of a typical NBT short break. The architecture of old estate stables might on the face of it seem a fairly specialist theme, but something original like this could be used to relate equestrian events and activities to heritage trails and other NBT products to create more substantial and integrated clusters.

3.1.9 Llama Treks

The authors are not suggesting that llama trekking should become a key element of NBT in the south of Scotland, but are encouraging public agencies with responsibility for tourism development and promotion to think creatively and *outside the box*. Although other regions of the UK (most notably in some of the English National Parks: the Lake and Peak Districts, North York Moors and Dartmoor) have established llama trekking operations, the authors are not currently aware of any in Scotland. But there is at least one pair of llamas living happily in a Borders valley and this presents a unique opportunity to offer something very unusual to visitors. Llamas are not part of the region's indigenous flora and fauna, but they represent a radical (and rather attractive) alternative to some of the region's other tourists! The richness of the region lies in its diversity and this should be celebrated and promoted.

3.1.10 Boat Trips

Activities in this category tend to be quite specialised, but most are accessible to the vast majority of visitors. Examples include offshore boat trips to go sea angling, visit sea caves and cliffs (to view or climb) or view cetaceans and seabirds, as well as kayaking and canoeing in rivers, lochs and on the sea. Visitors may not travel 100 miles for a particular boat trip, but they will be motivated by the range of choice in a cluster area that includes activities on both land and water.

3.1.11 Water Sports

Diving is an important but highly specialised NBT activity, although there is a non-specialist opportunity to promote accommodation facilities to divers, whilst river and beach fishing and swimming are both popular activities that require only a relatively small budget for marketing and maintenance (particularly of health & safety). In addition to the usual integration opportunities, there is a requirement for public agencies and private utilities to contribute to maintenance.

4.0 MARKETING EXAMPLES

To persuade farmers and other suppliers of the NBT opportunity, it is necessary to provide examples of how communities have benefited from NBT development, the associated integration of local supply chains and enterprise networks and the strengthening of community linkages between education, farming and tourism.

There are many examples from across the world that can be used to illustrate this cluster approach to tourism development and project team members have contributed to a number of these both in Scotland and overseas.

The examples described below include some with a specific NBT focus, but the relative paucity of established local clusters that can be adopted as strong regional models and as local showcase material perhaps provides the most vivid indication of the opportunity for NBT development in the south of Scotland. But the important conclusion is that the natural environment will sometimes not be an essential feature of NBT development.

4.1.1 Wild Redesdale

An example of good practice and successful cluster development in Britain is *Wild Redesdale*, just 15 miles south of the border in Northumberland.

In an area around Otterburn with a diameter of about a dozen miles to the south of the Cheviots at the edge of the Northumberland National Park, Wild Redesdale really began to take shape during 2001. Ironically the motivation for development was the crisis of Foot and Mouth Disease, the source of which is widely reported to have been just 20 miles away on a farm at Heddon-on-the-Wall. In the past couple of years, Wild Redesdale has quickly become a model for similar initiatives elsewhere and is well documented.²⁰

Following a decline in forestry during the 1980s and agriculture the following decade, FMD was the final straw for the area. Building on a specific rural regeneration programme designed as a foundation for economic development through the development of rural tourism activities, including bird-watching, fishing and walking, the original focus on the improvement of river habitats for fish and other species was expanded to include other businesses and activities. This is an excellent illustration of cluster evolution.

With minimal funding, the initiative was led by a single local individual who has now brought 50 businesses from across the area, replacing the traditional competition and individualism of remote farms and villages with a desire to work together. This has created a new identity "linking existing assets and developing new activities to attract visitors as well as serve local people", which meets the essential challenge of NBT.

An example of a new supply chain is an organic farmer who now stocks rare breeds, supplying local tourism businesses direct and increasingly (by mail order) the customers that have enjoyed his lamb and beef whilst eating in local pubs and staying at farm-based accommodation. The adoption of wildlife-friendly farming practices by many farmers in the area has also led to the return of otters, providing an additional attraction for residents and visitors alike.

According to Wild Redesdale, there were two key steps to success.

Identifying local assets was critical and involved a survey of potential tourism resources that included all the conventional tourism attractions (whose profiles were often low) as well as cultural heritage and the local colour that makes an area special and unique. Wild Redesdale called this last element *local distinctiveness*.

Promoting cooperative working practices was boosted by FMD, which had forced local businesses together. Local meetings provided an opportunity to discuss the benefits of working together and "the potential ... to keep tourists in the area longer" by distributing to their own and each other's customers information about all the local products and activities - and it worked. This cross-fertilisation and resulting savings on marketing costs provided demonstrable proof of the value of cooperation. It involved diverse producers, suppliers,

²⁰ This summary includes details from a radio broadcast by the BBC: *Changing Places: Wild Redesdale - a Rural Renaissance*, 11 October 2002.

even the local post office and grocers, as well as farmers and land managers that could offer fishing or shooting or who just happened to have interesting archaeology or wildlife on their land.

Wild Redesdale publishes a directory²¹ of all the businesses involved, which includes seven categories: Accommodation, Arts & Crafts, Equestrian, Fishing, Natural World, Professional, Refreshments and Retail. This range of diversity reflects the point that a sustainable NBT strategy cannot be dissociated from a broader community development context, but must be inclusive of all local enterprise and activity. The programme is successfully also marketing internationally and to the corporate sector, drawing in additional home-based businesses that offer professional services to visiting business people from the UK and overseas and making the development of the cluster relevant to even more of the local community and its economy.

4.1.2 Jedburgh Tourism Forum

Emerging from the Jedburgh Alliance²² that had formed in 1999, the foundation of the *Jedburgh Tourism Forum* reflects the realisation that took hold during FMD that tourism is essential to the rural economy.

Recognising that public agencies sometimes lack sufficient resources and the local knowledge to establish sustainable networks, the Forum adopted an inclusive grassroots approach to tourism development and established its own cluster of interested local businesses and organisations. With about twenty members paying a nominal annual fee, it includes farmers, retailers, food and accommodation suppliers and the local bicycle shop and has taken a lead in a number of new tourism initiatives.

In an effort to address some of the perennial challenges of tourism, the Forum meets to discuss opportunities and to network. Originally more frequent, these are now scheduled 2-3 times in Summer and double this number during the less busy Winter months. Consumer research has demonstrated that one of the major bugbears of visitors to the south of Scotland is that restaurants often close early. The Jedburgh solution is that they now coordinate opening times through the network to ensure that any night of the week at least one restaurant will be open and everyone in the Forum will know which it is. Hardly rocket science, but extremely practical and radically effective.

Seasonality is a problem for many tourism businesses. The Forum is tackling this by developing festivals and events during the shoulder seasons in Spring and Autumn. The Jedburgh Half-marathon is a new initiative to attract additional visitors during October, whilst an arts festival featuring local musicians and storytellers is being planned in early May. This sort of thing isn't new, but what ensures focus and efficiency is the local ownership of the process that generates the solutions.

The Forum has helped to establish new walks, cycle routes, heritage trails and craft trails to add value to Jedburgh as a tourism destination, bringing more visitors and trade, whilst new supply chains provide additional benefits to local suppliers. It has also engaged with thematic marketing initiatives such as Borders Banquet²³, which is a 10-day festival designed to showcase local food and culture during a traditionally quiet period of the tourist season. This is an illustration of a geographical cluster working in harmony with thematic promotions, so that each is contributing to the success of the other. It is a win-win relationship.

Like Wild Redesdale, the Forum is also now working with UK Trade & Investment²⁴ to market overseas, building on its success in domestic markets. This represents sustainable growth and a model for the region.

4.1.3 Berwickshire Coast

This is an area that is quite intensively farmed, but has unique coastal habitats, dramatic scenery and pretty harbours with plenty of local stories to provide *local distinctiveness*.

With preliminary guidance from the Borders Foundation for Rural Sustainability through its Farm Venture Group initiative, a major new product has been established through 'Making Tracks' support to contribute to

²¹ This can be found on-line at www.wild-redesdale.co.uk.

²² It can be visited on-line at www.jedburgh.org.uk.

²³ Promoted by a partnership of Scottish Enterprise Borders and Scottish Borders Tourist Board.

²⁴ Previously known as Trade Partners UK, this is a joint initiative of the Foreign & Commonwealth Office and Department of Trade and Industry and in Scotland is represented by Scottish Development International.

cluster development. Bringing together six farmers that together own fifteen miles of East Berwickshire coastline, *Cliff-top Discovery Tours* offers a range of guided Landrover tours along the coast. The product, which has adopted an environmental code for its activities, builds on existing diversified interests in the area and provides for greater integration and cooperation. As part of a NBT cluster, it helps to promote other tourism sites and enterprises in the area, including local hotels and restaurants, boat trips and the NTS visitor centre at St Abbs. It also contributes to thematic marketing by establishing links with other wildlife and NBT attractions beyond the immediate area.

The local network in the Berwickshire Coast cluster is more informal and less established than in Jedburgh, but is already contributing to the local economy through new employment and additional revenue streams. The opportunity now is to facilitate the implementation of a more structured network, based on sustainable models elsewhere.

4.1.4 Marinas Network

Hardly a conventional NBT cluster, this partnership between four small marinas along the east coast of Britain illustrates how the marketing of NBT is not so much the sites and products, but more their context and links to local facilities. That facilities and sites are unique simply adds value to the product.

Amble Marina in Northumbria believed there was an opportunity to encourage visitors to stay longer - two nights in stead of the usual one. In the same way that many tourists from England and beyond tend to drive straight through to the Highlands in search of NBT, sailors would often miss out the east coast altogether, believing that there was nothing to see and in stead sail direct to the Western Isles. The challenge was to develop a mechanism that would deliver that elusive extra night and bring tangible benefits to the wider community. During 2002 Amble Marina therefore commissioned some market research and last December brought together three other marinas in England and Scotland to discuss plans; out of this a marketing group *Sail East Coast UK* has been established, which now has a website²⁵ and a mission.

Whilst competition for residents remains fierce between the four marinas, they now collaborate on marketing to visitors, particularly from overseas, building on historic links with Northern Europe and have advanced plans to promote flotilla holidays and major events, including a North Sea Race.

The primary benefit however is not to the commercial marina operators, but to the communities in which they live and the wider environment. The network provides a showcase and additional points of access for local suppliers of goods and services. A classic illustration of success is a boat that originally books in for just one night and then stays for two weeks to sample local food and walk the length of Hadrian's Wall. With little support from public agencies and a minimal budget, the network has established links with Wild Redesdale and many individual tourism businesses and community enterprises. This integration gives additional cohesion to the local NBT products, whilst the network provides thematic linkages up and down the coast. The relevance to NBT is the point is that it does not need to be specific NBT sites that lead developments. The critical requirements are enthusiasm and a willingness to cooperate with and support local enterprise development and thereby contribute to community regeneration.

4.1.5 Southern Upland Way Forum

Led by a private partnership between a local tour operator and the former owner of a small hotel, the Forum grew from a recognition that this major walking route across the breadth of Scotland²⁶ was failing to make a significant contribution to the communities through which it ran. This gained greater emphasis and urgency during the FMD crisis and, following an initial meeting of stakeholders and with support from Scottish Enterprise, the Forum (although still relatively informal) was established in Spring 2003. It now involves sixteen villages and towns along the route and more than 250 local tourism businesses, retailers, public agencies, community groups and heritage organisations, including the Southern Uplands Partnership. This group meets monthly to network and to discuss additional opportunities to extend the Forum beyond the Southern Upland Way "backbone" and to engage the entire south of Scotland region.

²⁵ Coordinated from Amble, the group's website (www.saileastcoastuk.co.uk) also covers the tourism hinterland of Royal Quays in Newcastle, Hartlepool on Teesside and Eyemouth in Berwickshire.

²⁶ The Southern Upland Way is a Long Distance Path created in 1984 measuring 212 miles between Portpatrick and Cockburnspath.

Primarily marketing through its excellent website²⁷, the Forum promotes the route unashamedly as "Scotland's Ultimate Walk", a deliberate challenge to more established walking areas in the Scottish Highlands, and describes the potential of the initiative as "not just for [our] immediate businesses but for the local economy as a whole". The multi-functional website is a powerful resource that is an information gateway to local knowledge and initiatives for consumers and at the same time facilitates marketing by suppliers. Significant value is added by enabling communities and businesses along the route to define their services and "local distinctiveness". Consumers gain greater access to integrated information, whilst businesses and local community groups achieve greater market penetration by being part of a larger body. The critical mass achieved satisfies both consumer and business requirements.

Whilst the sixteen main towns and villages are linked together through the SUW, they also provide access to their own individual local environments - in terms of NBT resources, themes and attractions. Like the fabric of clothes on a washing-line, they are all different, but gain security by being well pegged to a strong line.

The Forum admits that it is "just scratching the surface" at the moment. Its vision is to have a representative of each of the sixteen community clusters along the route providing a link through the Forum to the whole of the south of Scotland. It is an ambitious plan, but it is realistic, because it is a grassroots movement for change. The Forum is currently developing plans to celebrate the SUW's 21st Birthday in 2005. Building links with local arts and heritage projects and other NBT activities, such as Forest Enterprise's tremendous Seven Stanes cycling initiative,²⁸ this is a consumer marketing device designed to create a more sustainable future for the Forum and its whole environment.

4.1.6 Kite Trail Trust

Of all the examples here, this initiative is built around what is perhaps the most conventional NBT product - wildlife in its natural environment. It is also an illustration of how effective small grant funding can be in encouraging the practical development of NBT solutions that really do contribute to economic regeneration.

Currently known as the *Galloway Red Kite Trail* and creating a natural anchor for the NBT cluster, the *Kite Trail Trust* itself is a longer term vision for the founding partnership of the RSPB, Forest Enterprise and a local farmer all operating around Loch Ken in Galloway. Echoing the sound environmental arguments made for wildlife conservation throughout the world from southern Africa to eastern Siberia, the aim is to demonstrate to the local community and businesses the economic and social benefits of protecting wildlife habitats for host and visitor alike.

As with other Red Kite re-introduction schemes in Scotland, the RSPB was keen to promote access for its members and other visitors, but in the area around Loch Ken local staff recognised a greater opportunity to utilise local infrastructure (forest paths and scenic roads) and involve a wider enterprise community. A farmer reported that cars were regularly stopping along the road to view kites in and above her fields, whilst paths through FE land were also identified as additional prime sites. Although it was the kites that selected their favourite feeding stations, it was the local organisations that seized the opportunity to jointly develop something more sustainable.

Originally conceived by staff at the RSPB Reserve at Ken-Dee Marshes near Castle Douglas in early 2002, but not seriously planned for a few years, the 'Making Tracks' scheme enabled the initiative to make tracks a lot more quickly. With approval for a small grant early in the new year, the partners invited nearly thirty local businesses to a preliminary stakeholder meeting in January 2003, which led to nine signing up as members of the scheme, paying a range of fees. These nine enterprises comprised six accommodation providers, two pubs and a village shop and Post Office. With additional support from a public agency (Scottish Natural Heritage) and a local conservation group (Dumfries & Galloway Raptor Study Group), the vision is to engage many more. The current plan is to organise wider stakeholder meetings twice a year to showcase the initiative and to draw in additional members, funds and new ideas creating innovative links.

²⁷ The website can be visited at www.southernuplandway.com.

²⁸ For further details, visit www.forestry.gov.uk/sevenstanes.

The majority of members have reported increased business since joining the scheme, the benefits of which include the production of integrated marketing material, cross-promotional activities and information boards. At least one of the pubs has been able to extend its opening hours and, unlike in an increasing number of rural towns and villages, the local Post Office continues to offer its services to the local community.

There are plans to establish educational links with local schools and thematic links with other new wildlife initiatives, such as the *Tweed Valley Osprey Project*, an other NBT scheme supported by 'Making Tracks'.

As the RSPB maintains "The project will provide great opportunities for locals and visitors to view magnificent kites", but perhaps more importantly it will also "help to demonstrate the importance of wildlife and a healthy environment to the local economy".²⁹

Of course the conservation and sustainable development of the natural environment is important, but it can be argued that the greater achievement is to prove its relevance and benefit to human social and economic development. The challenge is to ensure that local communities recognise and seize the opportunities presented by NBT and its promotion to visitors and hosts alike by engaging in its sustainable development.

²⁹ Dumfries & Galloway Tourist Board press release.

5.0 THEMES & RECOMMENDATIONS

The project team identified five broad themes from the review of sites and marketing analysis of proposed clusters. Together these themes provide the basis for a range of recommendations to promote and implement Nature Based Tourism products as a sustainable feature of tourism in the south of Scotland.

A. Context

At present there is very little contextualisation of sites. The vast majority of promotional leaflets and brochures make no reference to other sites in the vicinity. Last year's consumer NBT research demonstrated that it is the richness (in terms of choice of attractions) of areas that attract visitors and that only few sites have sufficient pulling power by themselves. This means that sites are undermining their own potential by failing to provide a local context in their literature. It is the context and cross fertilisation between sites that will help to secure their endurance as viable NBT attractions. In isolation, their scope for promotion is extremely limited.

The objective is to minimise *gaps* on tourist maps. This will present greater choice to the consumer, bring more customers to the supplier and help to generate economic support for the wider host community. Illustrations of successful cluster development elsewhere can also help to demonstrate to individual suppliers in each cluster specific opportunities and potential benefits of this approach.

Many public and voluntary sector bodies are extremely active and already make significant contributions to the communities in which they operate. These include Historic Scotland, The National Trust for Scotland, Royal Society for the Protection of Birds and Scottish Natural Heritage. There are however additional opportunities for leading agencies to make a greater contribution to the promotion of the wider clusters in which their sites are located. They can only benefit themselves - not only through gaining goodwill from the host community, but also by developing stronger links with local suppliers and partners. This is a particular application of the contextual theme.

Recommendations:

- Develop a more inclusive marketing framework, requiring ATB members to support each other and recognise the value of being part of a much larger *family*.
- Encourage more robust reciprocal arrangements for promotion of adjacent sites and tourist boards, even if not *natural* partners.

B. Sustainability

Tourism can bring tremendous social and economic benefits to host communities, but it can also have negative impacts. Sustainability in tourism is the concept of mitigating its negative impacts, whilst also promoting long term benefits. The sustainable development of tourism or any other economic sector is generally defined as that which "meets the needs of the present without compromising the ability of future generations to meet their own needs".³⁰ In terms of tourism development, this translates into environmental protection, transport and admissions policies, community engagement and integrated supply chain strategies.

According to recent research for the Association of British Travel Agents, 4 out of 5 consumers have an opinion about the sustainability of tourism. This might be about the importance of suppliers helping to preserve their operating environment or the provision of local foods and crafts. The implication is that consumers will respond positively to a demonstration by suppliers of their commitment to their local environment, although logically it does not follow that consumers will be switched off by a lack of environmental care. This was emphatically confirmed by last year's consumer research by NFO and Dunira.

But any initiative to promote sustainability, whether through good environmental management, community engagement and integration with local supply chains is likely to enhance the consumer offer and consumer loyalty. Unless suppliers demonstrate a commitment to their operating environment, why should consumers?

It is impressive that such a high proportion of sites are served by public transport, but it also significant that this is such a surprise. There is an opportunity to review how public transport can be better employed as a public resource. There is scope for bus shelters and buses themselves to be used as an advertising medium, increasing utilisation for the bus companies and facilitating visits to NBT sites - as well as promoting tourism resources to the local host community. This requires better communication between ATBs and transport providers to help establish the marketing framework.

With regard to admissions policies, it would not be appropriate or even possible to charge admission to the vast majority of NBT sites. The sensitive nature of NBT sites often means that there must be a trade off between promotion of sites (growth in visitor numbers) and their protection (restriction of visitor numbers) and this generally means charging for admission. A managed solution will normally therefore involve charges, as this disincentivises visitors, whilst also generating revenue for maintenance (to mitigate negative visitor impacts) and contributing to associated employment. In order to further mitigate the negative impact of visitors and to promote environmental protection generally, there is scope for linking admission charges to mode of transport. Relevant models have been successfully implemented elsewhere at NBT sites and are generally weighted against car travel and in favour of public transport. The opportunity particularly recommends itself in this region, due to the unusually high proportion of sites served by public transport, enabling sustainable transport policy to become a practical element of the regional strategy for sustainable NBT.

Recommendations:

- Develop and promote regional admissions policies that reward visitors arriving on foot or by bicycle, bus or train - without penalising less mobile and disabled visitors.
- Actively engage with public transport providers to establish a more integrated marketing framework.
- Promote the Green Tourism Business Scheme to new and existing tourism providers to encourage environmental responsibility and good business management.
- Encourage community engagement through consultation on new tourism developments.
- Encourage integrated supply chains by facilitating showcases of local suppliers.

³⁰ *op. cit.*

C. Development

The region is so rich in natural tourism products, that wherever there is will amongst potential suppliers and operators, there is an opportunity to develop a viable NBT cluster as a marketable product. There are three considerations: facilities, facilitation and funding.

To be viable, a cluster requires adequate **facilities** (to eat, sleep, wash), ideally at one of the cluster sites and otherwise at an accessible location nearby. Within each cluster, it is therefore important that facilities are identified at an early stage, as there must be facilities if a cluster is to be promoted as a mainstream tourism attraction. Information must be captured as to whether facilities are available just for car parties or whether they might be sufficient to (comfortably) service a bus party. Where facilities are not available, it could be a legitimate application of development funds to contribute to the building of public lavatories or car parks in order to allow the mainstream promotion of new tourism clusters. If ATBs are to promote new NBT sites in remote areas, they must encourage local authorities to tackle petty crime, litter, vandalism and fouling, particularly in the vicinity of cluster facilities. It is the minor seemingly insignificant crimes that have a disproportionate impact on how visitors perceive a place. Insofar as the key target markets are in urban centres and research has shown that getting "out-of-town" is a key motivator, it is important that petty crime is tackled effectively in order to enforce this expectation and confirm the countryside as a safe and clean place to visit. This will help to encourage visitors from urban centres to *escape* more often to the countryside and whilst there contribute to the local economy.

Cluster development also requires **facilitation** and ongoing support, since tourism marketing and product development do require specialist skills. But these can be taught and learnt. The project team presented a roadmap on 3 June 2003³¹, which recommended the appointment of a *Cluster Development Officer* (CDO), facilitation of local meetings and the identification of local *champions* and *experts*. The aim of this process is to respond to existing enthusiasm by facilitating meetings within each cluster to explore the opportunities for sites to collaborate. But a key element of the process and a great advantage for the region is that it already has sound models available to showcase for this kind of development. Examples include those based on themed towns along the DG coast, but there are others throughout the region, such as the Jedburgh Alliance (which generated the Jedburgh Tourism Forum) as well as others now coming through the 'Making Tracks' Scheme. Many are independent marketing associations, but without exception they are keen to share their experiences with emerging clusters in the region. This means that, although new clusters represent competition, those attractions that have experience of this kind of marketing initiative really are confident that this is the best way forward. Beyond the initial facilitation, the Steering Group has a responsibility to establish a monitoring and evaluation capability, which could be maintained by the CDO. Meanwhile there are opportunities for ATBs to review their promotional framework and develop it in ways that will directly benefit new entrants into the market and at the same time add significant value to their portfolio of existing tourism attractions.

The issue of **funding** is that European structural funds are limited and moving eastward, agricultural subsidies are in decline and there is no obvious alternative source of development funding available to facilitate diversification into tourism for the farming community (the original target for the 'Making Tracks' initiative). This means that, whilst 'Making Tracks' grants can make important (and sometimes critical) contributions to the development of tourism, any longer term strategy must seek to harness existing community networks, rather than relying on any significant new structure or organisation to deliver a developmental framework. Clusters that remain largely dependent on external funding and fail to harness local community networks are unlikely to prosper or survive.

Recommendations:

- Rigidly apply criteria for anchor requirements.
- Consistently apply guidelines for good management and development of clusters.
- Facilitate meetings within each cluster to explore opportunities for sites to collaborate.

³¹ See Appendix A for a copy of the presentation.

- Concentrate support on those clusters demonstrating that they have the most will and enthusiasm - this can often be more important than the natural resources they are trying to promote.
- Identify local *champions* and *experts*. Train them, support them and facilitate dialogue with representatives of other clusters.
- Utilise any funding resources available to facilitate cluster development, even if they are not focused precisely on the target markets. To avoid loss of momentum, it is critical to get the clusters established as quickly as possible. This will also provide evidence of success to others.

D. Integration

It can be argued that all clusters are artificial (a *marketing construct*), but they are critical to the viability of marginal resources. Every NBT initiative can contribute to the weight of a cluster and can in turn be supported by its context in that cluster. Here are highlighted just three opportunities to promote local integration: chains, characters and cycles.

Adopting a local supply **chain** policy is simply seeking out local suppliers of products and services; it does not necessarily imply cost savings, but it does reflect a more sustainable approach to business, which is at the heart of corporate social responsibility. The premise is that by engaging and making a proactive contribution to the local business community and your operating environment, the local community will respond by positively supporting your enterprise. In the context of meat production, there are of course issues about the shortage of local abattoir capacity, but the tourism value of promoting local produce should not be underestimated. Not only does it support the local economy and reduce negative environmental impacts from transportation, but it also helps to differentiate the destination. If the host community of tourism suppliers doesn't celebrate and promote their own local produce, why should it expect their customers to value it? Local community endorsement of its own local suppliers and their products will promote the destination as something more than *just another destination* and with a memorable unique selling point. Locally sourced and traditional local food in particular is a key attraction of rural tourism. Although many consumers will not list food as a primary motivator in the selection of their destination, research indicates that it can be key to building visitor loyalty and destination differentiation through brand values.

Every cluster will have its local experts - local **characters** that know the area back to front, know the local stories and know where to find rare flora and fauna. These might include retired gamekeepers, ghillies, shepherds and tractor-drivers; every single one is a gold mine of a resource. They can interpret the landscape (in every sense) for visitors and often they will not realise how much value they can add. They really do bring the countryside alive and should be identified and encouraged to contribute to cluster development. They are a critical element in the creation of viable clusters. Just as telephone callers prefer a human being to a recorded message, visitors are motivated by human story telling over intransigent interpretation boards. Linking this group to the theme of education integrates the whole concept of NBT back into the community and helps to ensure the sustainability of an NBT initiative by involving the next generation and helping local heritage and knowledge to survive into the future.

Complementing walking routes and scenic drives throughout the south of Scotland, there are additional opportunities to develop **cycle** tourism routes in the region, giving important additional access to NBT sites. Building on the theme of synergies between education and tourism, there is scope for building cycle hire resources. The opportunity is in making provision to schoolchildren during the week (promoting both health and sustainable transport) and then to visitors at weekends. The promotion of cycling to children will also open up the local environment to them, increasing awareness and creating another channel to promote local recreational facilities to the local community. The importance of child pressure to the sustainable development of tourism should not be underestimated. It also goes without saying that children are the future backbone of their community and their support for local initiatives and developments can be critical.

Sustainable transport policy should of course be an element of any sustainable tourism strategy.

Recommendations:

- Make appropriate integration with local supply chains mandatory for grants and other assistance.
- Identify local *characters*. Train them as trainers to ensure long term sustainability and facilitate cross fertilisation between clusters.
- Promote cycling as a feature of all new tourism initiatives, making sustainable transport policy a key element of sustainable tourism strategy.

E. Education

The vast majority of visitors to the countryside do not have a good knowledge of flora and fauna. Whilst the priority is to encourage visitors to come to the south of Scotland at all, facilitated by the promotion of NBT clusters, the greater opportunity is to capture visitors' imagination through education, encouraging them to explore new sites through thematic (non-geographic) clusters. These clusters will include important ornithological sites. But, unless there is accessible interpretation available at the geographic sites, the opportunity to educate and excite will be lost.

Even as part of larger tourism clusters, many sites are not viable solely as tourism attractions. In order for a new site to grow and develop, it must have local support, which means that it must add value to the community in which it is located. Local communities can benefit from new facilities such as safe outdoor children's activities. Similarly they can become important educational resources. Generally to be effective as an educational resource a site would need to contribute something to the National Curriculum, but it is worth both schools and site promoters exploring opportunities to make sites viable. Integrated community tourism relies on harnessing synergies between the needs of the host community and those of visitors. There have been several initiatives linking farms with schools, but these have often fallen by the way side - either because of competing Curriculum demands or because of concerns over public liability insurance costs. They are worth re-invigorating, as they will help to foster visitor-orientation in new sites.

This recommendation can be satisfied by making the inclusion of an educational plan a requirement of all new proposals - although a plan might simply involve knowing the name and address of every school within 50 miles and providing preferential access to school parties at least once a month.

Recommendations:

- Make appropriate partnerships with local schools mandatory for grants and other assistance.

6.0 CLUSTER GUIDELINES

The following criteria represent guidelines for the effective management and sustainable development of clusters and their infrastructure.

6.1 Composition

- Range: Ideally about 7-10 sites and generally not outside the 5-15 range
- Size: Maximum of 20 miles between most distant sites within a cluster and no more than 5 miles between any one site and the nearest adjacent site
- Anchor: A site designated as an anchor should offer all facilities and otherwise these must be identified (and sign-posted) in an accessible location within half an hour's travelling time of the majority of sites

6.2 Anchors

Although the nature of the anchor depends on which model the cluster conforms to, an anchor must meet three criteria.

- a) It has pulling power in its own right
- b) It has relevant accessible facilities (eat, sleep, wash)
- c) It has the management infrastructure to facilitate the development of a wider cluster

6.3 Management

Within each cluster, the following competencies, facilities or management training should be available. They do not need to be available at all sites (and it would be surprising and unnecessary if they were). But insofar as best practice can be shared within a cluster these should be available at least somewhere in the cluster and otherwise should be included in a practical development plan.

Some of these elements reflect good business practice required of Green Tourism Business Scheme (GTBS) members. However, since VisitScotland accreditation does not require GTBS management standards and the NFO/Dunira research showed that consumer recognition and valuation of GTBS is disappointingly low, there is no clear *marketing* benefit from making GTBS membership a requirement of NBT management. But GTBS members' standards are always sound and often exemplary and may therefore provide a useful model of good business management for NBT products (attractions) and cluster facilities (accommodation).

[This schedule of requirements is a development of a draft checklist being designed by Scottish Natural Heritage for the management of National Nature Reserves³²]

6.3.1 Staff training

- Context, including (where relevant):
 - site's historic and literary associations
 - links (geographic and thematic) to related sites and the local community
 - natural environment
 - origin of crafts available on site
 - information about materials used and design of any buildings on site
- Customer Care
- Disability Awareness
- Presentation Skills
- Communication Skills

³² An earlier version of the SNH checklist forms the basis of the 'Making Tracks' Annex 12, which is a practical tool currently being used to assess the resource capacity and capabilities of partnerships making proposals for support.

- Risk Assessment
- First Aid

6.3.2 Strategic management

- Cluster Facilitation and Maintenance Plan to continuously engage with cluster partners
- Visitor Management Plan, including ongoing monitoring and evaluation capabilities
- Environmental Impact Strategy, including management of waste and water
- Environmental Management Strategy, including survey and monitoring plans
- Interpretation Plan to maintain current information in a constantly engaging format
- Compliance with requirements of Disability Discrimination Act (taking effect October 2004)
- Industry Education Strategy to ensure Tourism Industry awareness
- Marketing Plan, including an internet and media strategy
- Community Education Strategy to engage local children and their families
- Supply Chain Strategy to maximise local integration
- Risk Management to assess hazards on an ongoing basis

6.3.3 Information and infrastructure

- Current leaflet, including:
 - map showing geographically related sites
 - details of key thematically related sites elsewhere in the region
 - details of local craftsmen and suppliers that have contributed to the site
 - information about the site's partnerships with its local community
- Supplies of leaflets to be available:
 - on site
 - at adjacent sites
 - at nearest Tourist Information Centres and other appropriate locations
- Market presence in all relevant visitor and community guides (in both print and electronic formats)
- Internet presence, including:
 - leaflet content, site directions and contact information on appropriate websites
 - links from and to websites of geographically related sites and facilities
 - thematic links from and to websites of associated sites and organisations
- Information on relevant anchor facilities (if not on site)
- Site orientation available on site, including details of:
 - way-marked trails (footpaths, cycle routes, bridleways)
 - on-site facilities
 - specific viewpoints
- Signposts between way-marked trails and site
- Signposts from nearest main road to car parking area
- Contact details:
 - for further information (local *experts*)
 - in an emergency

7.0 CONCLUDING REMARKS

The remarkable thing about the most robust Nature Based Tourism initiatives is that they sometimes have little specifically to do with the natural environment. More often than not they simply involve individuals, community groups or SMEs that just happen to have a good network of links and contacts and have a desire to build on these. Like the marketing examples in section 4.1, they are not simply a walking initiative, a NBT project or commercial enterprise (although they may be all these things), but their focus is primarily on social and economic regeneration of the region. Without a stable local community, one that is sustainable in terms of both social cohesion and economic development, few businesses will prosper. What tourist wants to visit beautiful countryside if the pubs, garages and post offices in every village are boarded up and the only food on offer arrived in the back of a refrigerated lorry that drove up the M6 five weeks ago?

There are many organisations, including tourist boards, enterprise agencies and marketing groups that can help with product development; some have even designed a comprehensive "Advice Pack" for new suppliers wanting to establish their own NBT products. There are small NGOs and agencies that can advise farmers on all the relevant regulations. There are many people that are willing to share best practice with others on the subject of local supply chains, food networks and successful product developments and marketing initiatives. But however successful methodologies might be have been elsewhere, they cannot be imposed. Every community network is unique and requires its own herbs and spices to make the recipe work.

This project has provided a map of many NBT resources across the south of Scotland and has proposed a range of possible clusters. Together with the recommendations, this is a plan for action. But the strategic analysis and product development proposals can only be a guide. The real opportunity is in the delivery and this requires the will and enthusiasm of individuals from within communities across the region.

A critical aspect of implementation is the identification of the local providers and characters that will make the NBT sites and clusters come alive for visitors through storytelling (in its broadest sense). The *sticks & stones* have already been identified, but the challenge now is to breathe life into them in original ways and to establish sustainable links between education, tourism, farming and the wider socioeconomy of business and enterprise. These linkages will enhance the resources available for NBT and contribute to the communities themselves. This will require some training and sharing of best practice within the region.

During the coming months, the 'Making Tracks' Steering Group should facilitate showcases of good practice to bring stakeholders together and to demonstrate what is possible without major capital investment. It should help to implement sustainable new networks and (initially) contribute to their coordination. Without additional resources, some of the existing networks could provide a framework or platform for development. In the medium and longer term, clusters and marketing groups need to be able to stand on their own two feet.

Whilst network development needs to be driven by local stakeholders, there is nevertheless scope for other agencies to help create thematic initiatives that can contribute to additional marketing activities and promotions, particularly in international markets, and also encourage more interaction between clusters.

To ensure sustainable development, there is a need to test the management proposals made in section 6.3 and to build robust evaluation methods for NBT products - particularly where supported by public funds.

7.1 Follow on activities

It may be worthwhile undertaking follow up research amongst target consumers and candidate sites, as well as with the travel trade, which can lend additional support to development initiatives. The project team and its partners can also draw on their experience of projects for other clients in Scotland and beyond, including England, Ireland, Eastern Europe, the Mediterranean, Caribbean, Africa and the Middle East, which often involves working with small community groups in marginal destinations. Building on this project's strategic analysis, we can particularly contribute to cluster facilitation, product and site development, supply chain integration, as well as training in consumer communication, environmental management, marketing and corporate social responsibility and monitoring and evaluation.

If required, the project team would be happy to provide more detailed suggestions of additional activities.

8.0 Contact details

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9.0 Appendices

- (A) MS Powerpoint presentation of 39 slides (*Sticks and stones*) by Dunira Strategy and The Borders Foundation for Rural Sustainability to the 'Making Tracks' Steering Group at The Tontine Hotel, Peebles on 3 June 2003.
- (B) Series of three MS Excel spreadsheets of marketable Nature Based Tourism products proposed for the south of Scotland, comprising:
- Summary of relevant Nature Based Tourism sites identified
 - Summary of appropriate Nature Based Tourism clusters
 - Summary of marketable Nature Based Tourism products identified in each cluster
- (C) Series of two³³ JPEG versions of ArcView GIS maps of clustered sites, comprising:
- Dumfries & Galloway
 - Scottish Borders

³³ Because of copyright rules, it has not been possible to combine the two maps produced during phase 1 of the project. The cluster numbers on the maps are listed in appendix B as corresponding references using the format *DGn* and *SBn*. For ease of access, images of these two Appendix C maps are also included in the Appendix A slides with slides 21 and 22 showing the proposed NBT sites and clusters in the Scottish Borders and Dumfries & Galloway respectively.