

Developing Nature Based Tourism in South Scotland

This project is supported by NatureScot, through the Green Recovery Fund



Julie Nock

Southern Uplands Partnership April 2021

Acknowledgements

This report reflects and expands on surveys, interviews and reports undertaken by:
Gethin Chamberlain, Scottish Borders Survey and Executive Summary of this Report.
Laura Esplin, Dumfries and Galloway Stakeholder Liaison and Wild Seasons Report.

Image: Angus Blackburn/Wild Season (SB)

Executive Summary

Tourism in the UK is changing. Visitors are looking for new experiences; providers are looking for new opportunities and one of the most significant consequences of these changes is a growing interest in nature-based tourism. Coronavirus and restrictions on international travel may have acted as a recent catalyst, but the signs were there already as people craving more mindful holiday experiences have sought to engage with the natural environment. For those already engaged in nature-based tourism, it is an exciting prospect. Scotland is now literally a land of opportunity and while many have traditionally associated the country's natural bounty with the Highlands, there are signs that this too may be about to change. Nature-based tourism is already estimated to be worth more than £212 million to the economy of Southern Scotland, a region which stretches from the west coast of Dumfries and Galloway right across to the east coast of the Scottish Borders.

The research reveals a huge appetite for making more of the natural beauty of a region and a belief that the South of Scotland is now ready to seize the opportunity to emerge as one of Scotland's natural treasures. Scotland's scenery, wildlife and outdoor activities regularly feature among the most important draws for tourists, and the scale of what is already on offer in the South of Scotland offers much encouragement for a bright future.

Dozens of businesses and organisations took part in this research project, which found birdwatching, nature trails and wildlife viewing topped the list of activities currently on offer. Guided walks, farm visits and stargazing all proved popular with visitors along with activities including foraging, tree climbing, wild swimming, guided cycling, countryside crafts, kayaking, boat trips and horse riding. Conservation volunteering, farm visits and guided cycling featured on many wish lists. The research revealed an abundance of many of Scotland's iconic species. Red squirrels are present across the south west and can be found doing well through the western and central Scottish Borders. Otters are reported to be active throughout the region's river systems. Golden eagles are already present but many people are pinning their hopes on a reintroduction programme already underway which promises to make them a more familiar sight in skies already graced by elegant ospreys and red kites. Badgers, buzzards, roe deer and fox were reported to be present locally by more than 80% of respondents.

The recent community buyout of Langholm Moor to create a 5,200-acre nature reserve shows an increasing desire among people living in the region to make the most of their natural resources. But what was also significant was the international interest, with donations to the crowdfunding effort coming from around the world. Meanwhile millions are already being pumped into developing the region's world-class mountain biking and into pilot projects to find new ways to protect the south's natural assets through nature-friendly farming and diversification.

To maximise the region's potential the report recommends tackling two key areas: perception and infrastructure. Put at its most basic, many people simply don't know what is on their own doorstep. If visitors are to be encouraged to make the most of the region, then investment is needed in training up guides who can show them how to get the most out of their visit. The research found a widespread belief that developing a network of qualified guides could be a game-changer - but that even small-scale training programmes to give businesses confidence to promote their local wildlife and natural attractions would have a significant impact and provide opportunities for joint working.

There was a feeling that more could be made of existing resources if those involved in nature-based tourism were assisted in working more closely together, putting together daily itineraries taking in multiple locations across the region. There was support too for the development of organised viewing opportunities and public hides to make it easier for visitors to see some of the region's key species up close. Facilities for viewing red squirrels and red kites have already proved popular and successful in Dumfries and Galloway and provide a model for similar projects across the wider region to provide feel good experiences for visitors and local people alike - including an osprey viewing facility to rival those found in other parts of Scotland. Similarly, there is potential - and support - for the expansion of dark sky tourism in the Scottish Borders and to build on the success of the existing Dark Sky designation for the town of Moffat in Dumfries and Galloway.

With climate change expected to resume its pole position as the most pressing issue in a post-pandemic world, the need for green recovery and more environmentally friendly holidays has never been more urgent or more compelling. For those already involved in nature-based tourism in the south of Scotland, this report demonstrates just how positive they can feel about their current and future position. For those wishing to get involved, it is a clear

incentive. As the report makes clear, the South of Scotland is home to some of the country's most glorious landscapes and natural wonders and is now ideally positioned to become a standard bearer for the future of nature-based tourism.

Introduction

'Scotland's nature and landscape are the main motivation for tourist visits, and critical asset for the £4.4 billion industry. Our tourism work is a key way to demonstrate how nature and landscape contribute to Scotland's prosperity, in support of its positioning as a 'green' and competitive destination. It offers us the opportunity to make stronger connections between nature, landscape and the economy, and with the rural communities that welcome and host visitors.' NatureScot

The global pandemic and increased awareness of climate change has catalysed a huge return to nature-based activities and many are finding solace and renewed appreciation for the natural environment. The prospect of international travel is of great concern bringing staycations into sharper focus in the short to medium term across the UK. Open access nature-based sites have witnessed a marked increase in visitor numbers throughout the lockdown periods (walking, cycling, wild swimming, etc.,) and whilst this has caused some local concerns at remote sites (wild camping) it has in the main, been a favourable and welcome addition. However, nature-based tourism providers have been severely affected through 2020/21 with 97% of survey respondents reporting that their business had been affected by Covid 19 restrictions.

Recent developments such as the £3.8M purchase of Langholm Moor and their plans to turn the 5,200 acres into a nature reserve whilst developing nature-based tourism on site has highlighted the region to a worldwide audience with over 4000 people donating to their crowd funding site from across the globe; Borderlands Inclusive Growth Deal will provide £19M into developing Innerleithen Mountain Bike innovation Centre; £11M for Destination Tweed Tourism projects along the River Tweed network, funding for further development of 7Stanes mountain biking network and pilot projects for woodland, upland and agricultural areas to trial new approaches in valuing and protecting natural assets; South of Scotland Destination Alliance received £2.7M to position tourism in South Scotland for sustainable future growth. These substantial investments will rely in part or wholly on the natural assets of the south and provide a springboard for nature-based tourism to flourish.

Given the move away from international travel for the foreseeable future, there is a real opportunity for the south to attract a fairer share of the market through promotion of the environmental and cultural wealth it has in abundance. This report reflects national strategies (Scotland Outlook 2030, Green Recovery and the work of STERG) and sets out a range of measures that could be adopted to capitalise on the opportunities presented.

To inform this report two surveys were undertaken in Scottish Borders (Survey Monkey) and Dumfries and Galloway (stakeholder interviews) through February and March 2021. The surveys targeted nature-based tourism in its widest sense by approaching accommodation providers, services, wildlife charities, visitor attractions, statutory bodies and wildlife sites. People were asked to provide information on a range of measures they felt they would need to implement to establish or increase their NBT offering.

This document provides a snapshot of the survey results, outlines the range of issues, barriers and opportunities responders highlighted and lists a range of measures that may address these.

Additionally, we were asked to review the Explore for a Day series in Scottish Borders and Dumfries and Galloway which has been included in this document.

Ben Mardall, Wild Scotland (former) Chair explains why 'Wild Scotland is Now': "Scotland's landscapes, wildlife and outdoor activities are consistently given as the top reasons for tourists to visit our country. With over 70% of the industry anticipating growth in the next three years (ref WS industry survey 2019), our "Wild Scotland is Now" strategy is based around promoting our members and the wider industry to secure Scotland as a first-class destination for wildlife, adventure and activity tourism".

Surveys

An online survey was circulated to 191 businesses, organisations, community groups, statutory organisations and charities across south Scotland during February and March 2021. A further 12 interviews were conducted by telephone /video.

Table 1: Replies were received from:

| | | | |
|----------------------------------|---|---------------------------|----------------------------------|
| 28 Accommodation Providers | 7 Guides/Rangers | 20 Visitor Experiences | 9 Visitor Centres/Attractions |
| 6 Area Initiatives | 17 Nature Reserves/Preservation Organisations | 2 Gardens | 46% Response Rate |

Table 2: Nature Based Tourism Survey Results Snapshot (percentage responses from both surveys)

| | | |
|---|---|---|
| <p style="text-align: center;">76% Offer nature-based tourism</p> | <p style="text-align: center;">Top 3 visitor activities:</p> <p style="text-align: center;">Birdwatching 45% Nature Trails 41% Wildlife Viewing 34%</p> | <p style="text-align: center;">How much demand for NBT:</p> <p style="text-align: center;">A great deal 38% A lot 26% Moderate amount 21%</p> |
| <p style="text-align: center;">Top 3 activities sites would like to develop:</p> <p style="text-align: center;">Guided Walks 50% Birdwatching 46% Wildlife Viewing 43%</p> | <p style="text-align: center;">Top 3 services offered by sites:</p> <p style="text-align: center;">Accommodation 60% Food and Drink 35% Guided Tours 33%</p> | <p style="text-align: center;">Top 3 services sites would like to develop:</p> <p style="text-align: center;">Guided Tours 66% Outdoor Activities 58% Accommodation 28%</p> |
| <p>What would be most useful to help introduce or expand NBT offering – weighted average of 3 options:</p> <ol style="list-style-type: none"> 1. Financial assistance 2. Tailored advice 3. Regional promotion | <p>How much would it cost to develop NBT on site – top 5 answers</p> <p style="text-align: center;">£5-10K 21% £1-5K 18% Below £1K 13% £25-50K 11% £10-25K 9%</p> | <p>Top 6 wildlife species present on site:</p> <p style="text-align: center;">Buzzard 86% Roe Deer 84% Fox 83% Badger 80% Otter 72% Red Squirrel 65%</p> |
| <p>Top 5 species visitors would like to see - weighted average of 5 options:</p> <ol style="list-style-type: none"> 1. Golden Eagle 2. Red Squirrel 3. Osprey 4. Otter 5. Badger | <p>97% of businesses had been affected by Covid 19 restrictions. On average, businesses are currently operating at 12% capacity and hope to reach 70% capacity by summer 2021 36% felt they would be affected by Brexit</p> | <p>Would a regional showcase event such as a wild film festival help to promote NBT:</p> <p style="text-align: center;">65% strongly agreed/agreed 83% of interviewees agreed 0.2% disagreed</p> |

“Collaborations with guides or help from local nature groups, RSPB/SWT/SSRS etc., to provide guides / local interest facts & literature / improve visitor experiences. Also, to promote rangers and local guides to link in with accommodation providers to have bookable new experiences to sell.” Survey Respondent

A range of questions were included in both surveys to draw out barriers and issues faced by those wishing to instigate or further develop nature-based tourism initiatives. The table below outlines these from both surveys.

Table 3: Issues and Barriers

| Issues and needs from survey and interviews |
|--|
| <p>Specialist knowledge and product development</p> <ul style="list-style-type: none"> • Training to understand how to develop pre bookings for accommodation and service industry businesses • Expert knowledge and guidance to interpret on site natural heritage • Develop on site guided walks and tours • Access to specialist local knowledge to increase business opportunities to improve, diversify and expand offering around NBT • Help to develop staycations • Advice and guidance to develop NBT packages • Develop outdoor activities • Development planning advice and assistance • Investigate opportunities to maximise the crossover between natural and built heritage • Developing educational opportunities that could be offered to young people, communities and tourists |
| <p>Marketing, advertising and promotion</p> <ul style="list-style-type: none"> • Assistance with promoting sites locally, nationally and to European visitors • Advertising resources that could be used by all businesses • Centralised platform for all NBT • VS (national/worldwide) advertising for NBT • Relevant marketing to allow businesses to grasp the opportunities around NBT |
| <p>Training, upskilling</p> <ul style="list-style-type: none"> • Upskilling or full training programmes to become wildlife guides (as an add on to existing service offer - cycling and walking tour leaders) • Nature guide course to help business diversify • Increased knowledge base for staff and volunteers through ‘easy to access’ NBT courses • Courses to identify wildlife on site • Enhanced knowledge of local habitats • Local knowledge of accessibility to wildlife |
| <p>Infrastructure</p> <ul style="list-style-type: none"> • Develop more wildlife and waymarked walks • Provide wildlife viewing opportunities • More carparking/lay-bys in natural beauty spots • Develop custom built hides for viewing wildlife and birds • More camping spots and campervan/caravan facilities required |
| <p>Information</p> <ul style="list-style-type: none"> • Survey of wildlife and best viewing spots to concentrate tourism and ensure species protected • Local tourism information (VS to step up local efforts) |
| <p>Services and products</p> <ul style="list-style-type: none"> • Ranger service linked to local businesses • Bookable guide service linked to accommodation providers • Tailored itineraries for guests • Opportunities for dark sky sites in Scottish Borders |
| <p>Finance and funding</p> <ul style="list-style-type: none"> • Habitat improvement funding • Relevant funding to allow businesses to grasp the opportunities around NBT |

Networking and collaboration

- Collaboration with other tourism businesses, projects and communities
- Joint promotion of sites, local links and networking opportunities
- Coordinated wildlife group to share insights across the industry

Showcasing and flagship events

- Big regional, south Scotland events to highlight the breadth and depth of NBT sites to draw in larger visitor numbers
- Local wildlife film festival
- Nature based tourism website for south

Other

- Easy access to commercial forestry to help diversify – onerous and expensive application process for access licenses (cost passed to customer which increases price of package)
- National park status and borders biosphere
- Broadband/4g issues hindering businesses

“I am a mountain bike guide and instructor and I think nature-based led rides would be really popular but I am not a specialist in wildlife/nature so it would be a great help for me if I could be put in touch with nature experts to help me develop this side of the business.” Survey Respondent

A number of opportunities were highlighted by respondents:

- New focus on south (SOSE) rather than by region (DG/SB) is an opportunity to become a new destination and steady funding streams will increase capacity to develop nature-based tourism
- Need to raise awareness of nature friendly farming and diversification opportunities. Need educational courses in countryside and farm management
- Community transport volunteers – potential to become guides
- Forge links to golden eagle project and raptor trail
- The purchase of Langholm Moor could be the catalyst in attracting more nature-based tourism visitors
- Huge support for wild film festival
- Developing nature-based tourism demonstration projects through partnership working with industry and public sector stakeholders (e.g., Wild about Argyll – a capacity building and skills development project)
- Building knowledge and skills in the tourism industry (through natural heritage familiarisation visits and workshops)
- Exploring the opportunities around dark skies in Scottish Borders
- Providing information for visitors (for example Explore for a day) and promoting Scotland’s outdoor access rights
- From survey 50% would like to develop walks, 66% develop guided tours and 65% agreed that a showcase event such as a wild film festival would promote NBT
- 72% offered nature-based tourism which accounted for 51% of their business opportunity

‘There are lots of nature-based offerings across D&G/Borders, but unless part of a large NGO we tend to all operate alone. There is very little linkage between nature-based sites in the immediate geographical area, or presenting them as a day out package to visitors e.g., visit Grey Mare's Tail or harriers at Langholm in the morning, lunch in town, red squirrels at Eskrigg early afternoon and a dusk walk at Castle Loch to spot otter etc. We do this at our B&B for guests when planning their day out but there isn't anything more widely available’

Survey Respondent

The table of barriers and issues has been expanded below to provide possible solutions.

Table 4: Barriers and Opportunities from the Survey and how these may be Mitigated/Utilised

| Barriers and opportunities from the survey and how these may be mitigated/utilised |
|---|
| <p>Specialist Knowledge and Product Development</p> <ul style="list-style-type: none"> There was a need for one-to-one specialist knowledge, advice and practical assistance on product development, staycations, diversification, pre bookings and development planning from NBT businesses and services. Groups and businesses requested advice to develop walks, outdoor activities and educational opportunities. This would be best served through a part time development officer post in each local authority area to help grow the sector, foster a culture of innovation and create collaborative opportunities. Working directly with NBT providers would inspire confidence, develop more robust enterprise and provide valuable insight into the wider opportunities around NBT. It is envisioned that the post holders would act as a conduit to regional tourism initiatives (SSDA, NatureScot, etc.,) to build strong partnerships, provide a voice for the sector and develop leadership skills to unlock potential and inspire and drive change. Post circa £35K pro rata 3 days per week per region. Digital marketing information packs (or links to an online resource) circulated to all NBT businesses to include how to guides, advertising resources, film, photo, copy writing examples. A range of online resources and existing business courses could be adapted for NBT. Perhaps approach/collaborate with SSDA/BG/SOSE for tailored assistance to adapt toolkits and these could be promoted and shared to NBT sector through post holder (SSDA are currently developing web resources and there is a section on the website for people to add images/footage). Wild Seasons produced a very useful marketing guide for nature-based tourism which could be updated to include Scottish Borders https://www.gsabiosphere.org.uk/wp-content/uploads/2019/05/FINAL-Wild-Season-Marketing-Guide-Interactive-PDF-Dec-2013.pdf Suggest a desk-based audit of natural and built heritage sites that share same location to identify sites for further development/interpretation/trail building (NatureScot/Intern) which could be fed to officer for implementation. |
| <p>Marketing, Advertising and Promotion</p> <ul style="list-style-type: none"> Nature based tourism in south Scotland needs a web presence and there are underused existing website with content (Wild Seasons http://wildseasons.co.uk/) which could be updated, upgraded, include digitised content from NBT sites, social media feeds and links to main tourism websites. Suggest Wild Seasons remains as one main URL with separate sections for SB/DG, social media feeds, links, etc., circa £10K. The website would need to be regularly updated (many good sites have fallen by the wayside as they relied on volunteers to undertake this task). A paid post for 6 days per month (circa £9K per annum) would provide a professional service including social media activity. Lots of really good content out there but it needs to be brought together or effectively linked for south Scotland and promoted/updated long term by a professional so it becomes the go to place for all natural and built heritage in south Scotland. Existing content (NBT site leaflets) could be converted to e-flip books and included on the site. It may be possible to attract page advertising to Wild Seasons to cover running costs. Open social media pages and create links to all existing sites/groups/wider tourism initiatives (could be part of officer post) feature wildlife spotting, local sites and encourage tourists/wildlife groups (many already on social media) to add content. Link to website Joint marketing campaign (VS, SSDA, NatureScot) to promote south Scotland natural and cultural heritage (no gateway site for heritage in south Scotland) including day trip catchment areas NatureScot Explore for a Day routes transferred to Scotland Starts Here website, convert content to e-flipbooks and look at developing further routes Consider/scope NBT section on Scotland Starts Here including features that allow people to book tours, accommodations, packages, etc., and provide a gateway link from their main site to Wild Seasons so visitors can access wildlife and site information (note: many sites in both regions are charitable, not for profit, community, etc., consideration needs to be given as to how these could be included in an overall |

offering through fee free or heavily subsidised subscription) <https://www.ssdalliance.com/scotland-starts-here/>

- Establish links and encourage collaboration between wider projects such as South Scotland Golden Eagle Project, Galloway Kite Trail, National Walking and Cycling Network and Scotland's Great Trails, popular local sites, etc., (part of officer duties)
- There are many excellent leaflets available from NBT sites for visitors to pick up but little of this is available online. PDFs are difficult to effectively view or navigate on a mobile device and have to be downloaded. Conversion of PDFs to e-flipbooks is relatively cheap (circa £30 per page) and the format works well on all digital devices. This may be a way to digitise and amalgamate existing content as part of an NBT website and on social media to showcase the wealth of sites available in the south.

Training and Upskilling

- Respondents expressed a desire for NBT training programmes (many activity-based courses available, very few NBT courses) to increase onsite knowledge of species and habitats or upskilling bridging courses for existing guides to diversify their offering. There are a number of volunteers working at NBT sites across both regions with excellent knowledge (no volunteer data base, would need to access through local groups, SWSEIC, U3A, etc.), these could be brought together through partner programmes (volunteering network and commercial sites) to provide wildlife spotting skills training (outreach to be part of officer post) to share skills and ensure succession.

Upskilling of existing guides could be delivered locally by arranging 3-day courses by an accredited trainer (10 people including course preparation, materials, delivery and venue circa £4.5K per course). There are few accredited courses available in Scotland and these can be costly: 1 year Wildlife Identification course, LANTRA Accredited £1,440 per person

<https://wildlifeidcourses.co.uk/index.php/our-scottish-courses/wildlife-identification-in-the-loch-lomond-and-the-trossachs-1-year-qualification/> Scottish Tour Guide Association Blue Badge Scheme £7,500 per person <https://www.stga.co.uk/>. Speyside Wildlife offer 2-day courses (birding options only) £234 per person <https://www.speysidewildlife.co.uk/> Speyside are LANTRA accredited and it may be worth investigating a franchise element to train people locally.

Alternatively, Borders and Dumfries and Galloway Colleges could be approached to implement provision for this obvious gap in the national market and with vision, south Scotland could become a national base and leader for NBT education and skills through accredited programmes which in turn would support the entire NBT industry. Additionally, this would provide a route in for apprenticeships (ageing demographic, need entry points for young people) in wildlife/ranger/guide training to attract new people and nurture talent within the sector (NTS England recently introduced a 26 month Countryside Ranger Apprenticeship scheme <https://www.nationaltrust.org.uk/press-release/training-the-countryside-guardians-of-tomorrow-as-apprenticeship-donations-top-2m>)

Traineeships are also an area worth exploring further and perhaps local wildlife charities and organisations could be encouraged to come together to provide a yearly funded programme to provide entry level, accredited opportunities such as the Trees For Life <https://treesforlife.org.uk/about-us/work-with-us/traineeships/> programme funded through HLF 'Skills for the Future'

- Wildlife and conservation volunteering opportunities are popular in most countries and people pay to volunteer <https://www.gvi.co.uk/find-a-program/> or give labour in exchange for accommodation and meals <http://wwofinternational.org/> Liaising with sites to determine interest in the idea could be developed as part of officer duties and once a list of sites identified, the offer could form part of an NTB website/social media page matching sites and volunteers. Volunteering could be focussed on habitat and infrastructure improvement across a range of sites.
- There was a need to raise awareness of nature friendly farming and diversification opportunities. Sites require educational courses in countryside and farm management. Suggest approaching Border and Dumfries and Galloway Colleges to look at adding to/adapting curriculum. A dedicated development officer could provide diversification advice, help to enhance skill sets, provide knowledge pathways (perhaps through site visits to network partners and exemplar sites) and inspire greater aspiration within the industry i.e. diversification ideas such as Bird Gardens, Alpaca Trekking, Red Deer Viewing and Equestrian Tourism.
- Businesses requested training to understand how to develop pre bookings for accommodation and services. There are many excellent courses provided by Business Gateway and if a number of businesses (i.e. 10) were to come together for specific training, BG may be able to tailor existing courses to accommodate this.

- Explore for a Day Familiarisation Days were a great success with NBT and wider tourism sector delegates helping to showcase regions, provide educational opportunities, cross pollinate ideas and promote business to businesses and partnership working across the sector. Suggest revisiting Explore for a Day Familiarisation Days from a south Scotland perspective.

Infrastructure

- There were several calls for more lay-by's, parking areas and Covid 19 restrictions have highlighted the need for more amenities in natural beauty spots (some suggested land could be given over to communities for this purpose). Suggest further research to identify possible locations for infrastructure improvements to highways and amenities. Feedback from camping accommodation providers indicated a gap in provision between what is needed in response to increased camping-based tourism (wild camping, camper/caravans, pitched tents) and available facilities. This issue needs to be flagged to wider tourism initiatives and disseminated as there is an obvious business opportunity. Forest Land Scotland extended their car park use to accommodate overnight stays during their 2020 'Stay the Night Scheme' <https://forestryandland.gov.scot/staythenight> Suggest approaching FLS to see if this could be permanently adopted in south Scotland. The idea could be broadened to include community initiatives and nature viewing sites which could provide additional income through a web based bookable list of off grid, low impact overnight campervan/camping sites.
- Broadband and mobile phone coverage still an issue in remote areas – this will need to be addressed to allow NBT to flourish in the south.
- There is an increasing infrastructure challenge around electric car charging. South of Scotland Destination Alliance (SSDA), estimates that 40% of visitor journeys will be by electric vehicles in 2026 and 70% by 2031 <https://www.southofscotlandenterprise.com/media/1227/powering-change-calling-the-south-of-scotland-to-action-final.pdf>
- Respondents requested wider networks of waymarked walks and assistance to develop wildlife walks on site. This could be developed on private lands or through community/charity initiatives or public sector land i.e. Buccleuch Group, Forest Land Scotland, Regional Authority, etc., Officer post could provide guidance to small sites on wildlife walks and with training in basic wildlife spotting (see training section above) would gain the confidence to develop their own.
- The number of guaranteed wildlife viewing opportunities may be increased to provide additional income streams and bookable products through the creation of well managed viewing hides in wildlife hot spots. Popular sites such as St Abbs Head NNR, Eyemouth Marine Reserve, Tweed Valley Ospreys, Barrhill Woods, WWT Caerlaverock Wetland Centre and Bellymack Hill Farm enjoy a steady stream of visitors. Through an audit of sites and consultation with community wildlife volunteers/organisations to identify consistent viewing sites, 6 preferred wildlife viewing locations per region could be identified and installed. Investment in golden eagle, red squirrel, red kite, otter and osprey viewing infrastructure could provide wider opportunities for guided tours and form a core of bookable experiences/products to be offered through an NBT website and if certain sites became popular these could perhaps be developed further into visitor centres. Hides circa £7K per site
- Scottish Government has ambitious targets to increase woodland cover in Scotland from 18% to 21% by 2032 and much of this will be in the south. There are large swaths of private and public land that may perhaps be used to further off grid, low impact tourism and provide income streams for land owners, communities and local businesses if further access, leasing or land owner development could be agreed (many of the souths privately owned commercial forests have little access). If this could be addressed and routes made to link existing forests this might open up wider scale tourism initiatives such as off grid huts, cycling and walking routes and take the pressure off rural communities who are losing affordable housing stock to tourist accommodation and holiday homes (e.g. Lake District, lack of affordable accommodation for local workers). The 1,000 Huts initiative <https://www.thousandhuts.org/aboutus> seeks to create a culture of recreational huts. The idea to develop off grid accommodation in forest settings can be expanded to create business opportunities through service provision (guides, bike hire, deliveries, cleaning, laundry, etc.,) and tourism products.

Services and Products

- Collectively the south has a whole host of routes into NBT through cycling, walking, nature-based activities (diving, climbing, horse riding, etc.,) wildlife watching, built heritage, guides, tours, community projects, etc., All needs to be tied together and resources pooled to develop effective and quality products and create further opportunity. Great examples of coordinated and cohesive approaches from an area or key species perspective are: Go Tweed Valley <https://www.gotweedvalley.co.uk/> who offer

bike hire, training, 'Led by Locals' guides, events, accommodation and packaged experiences; By bringing community groups, local business, farmers, charities and statutory bodies together the Galloway Kite Trail <https://www.visitscotland.com/info/see-do/galloway-kite-trail-p582081> is exemplar of a successful cluster-based model (as part of our research The Heart of Galloway Visitor Centre stated that leaflets for the trail continue to be their most popular resource) and could be replicated across many destination nodes and wild life hotspots. See:

<https://www.rspb.org.uk/globalassets/downloads/documents/positions/economics/the-galloway-kite-trail.pdf> for economic, employment and environmental impacts.

- The south has a diverse range of habitats from coastal to upland and a wide range of specialist guides are required to ensure there are services and products for each environment to maximise opportunities. A register of guides would provide a resource and identify obvious gaps. Suggest outreach to find all local guides and rangers (volunteer and paid) with information transferred to an online booking system (perhaps Scotland Starts Here/SSDA)
Further development work could provide routes and tailored itineraries for local businesses to market (this could be undertaken by development officer) some of which may be adapted from existing resources such as the excellent mobile friendly series produced by Scottish Borders Council Ranger Service on www.walkscottishborders.com
- Galloway Forest Park and the Scottish Dark Sky Observatory have proven to be a popular destination for dark sky viewing and Moffat's dark sky friendly street lighting makes it Scotland's 'Dark Sky Friendly Town'. There are many areas such as upper Ettrick and Eskdalemuir where this opportunity might be replicated through dark sky park designation and a variety of small towns in south Scotland could join Moffat with adapted street lighting. There are further opportunities to expand our night time offering through night time safaris (many of our native species are nocturnal – bats, badgers, foxes, etc.,) and pre-dawn discovery tours (black grouse, morning chorus, etc.,)
- The Destination Tweed Project could be mirrored in Dumfries and Galloway to establish a coast-to-coast route through the lowlands of south Scotland via the River Annan which rises very close to the source of the Tweed at Annanhead Hill. Work to restore habitats and wildlife along the River Annan began in 2015 through the RAW project <https://www.riverannan.org/raw> The Annan River basin encompasses the Grey Mares Tail NNR, towns of Moffat and Annan alongside a number of cultural and natural heritage sites before reaching the Solway.

Finance and Funding

- Finance and funding are a barrier for many businesses in the current climate. 62% of respondents felt they could introduce new or upgrade existing nature-based offerings for £10K or less (13% for less than £1K, 18% £1-5K). Charitable and community groups have access to a wide range of funds and perhaps through partnerships with business, across target areas with untapped potential, a funding proposal could be worked up to mitigate this. Respondents suggested the following items were required to develop NBT: improving paths, signage, information materials, ranger services and local wildlife surveys. Areas they viewed as prime for development included: guided walks, nature trails, electric bike and photography tours, bird and wildlife watching, conservation volunteering, foraging, farm visits, countryside crafts and stargazing. As local authority ranger services dwindle due to budget cuts this may be a way forward to ensure upkeep of existing paths and routes and develop new.

Networking and Collaboration

- Suggest an audit of all nature-based accommodation, services, sites and wildlife groups to provide data on the size of the market in south Scotland. This information could be used to assist groups and businesses to collaborate, network, envisage wider product development and provide web and social media opportunities.
- A south Scotland badge scheme for nature friendly accommodation providers, wildlife sites and services could be adopted. The Green Tourism Business Scheme has proved popular and membership has become a selling point as it provides quality assurance of green credentials for visitors. A nature friendly badge scheme would give confidence and provide quality assurance within the wider market as badge scheme members would agree to a range of nature friendly measures (along the lines of Biosphere Charter) before signing up. Badge scheme members could be listed within a booking platform on an NTB website and use their designation to attract visitors from wider catchments.
- A representative regional nature-based tourism group that feeds into wider tourism organisations (SSDA, etc.,), regional initiatives and successful projects could be formed across the south with local feeder groups regionally. This would strengthen industry leadership and provide a shared platform to

understand and act on market and industry needs and share best practice. Such a group could also broadcast information on wildlife sightings to the wider network highlighting species that were likely to spread into neighbouring areas, provide education on species and habitat protection and support the wider aim of responsible tourism.

Showcasing and Flagship Events

- Large flag ship events really help to highlight the entire region and year on year, gain far reaching attention if they can build a level of sustainability (many have faced this issue). To grow audiences the south needs regular calendar events offering gateways in from other sectors/interest groups as part of an overall concept to attract a variety of audiences.
Suggest revisiting Wild Film Festival (very popular with survey respondents) that was hosted in DG 2017. A slimmed down version alternating yearly between Scottish Borders and Dumfries and Galloway in one location per region (this could form part of a wider yearly NBT festival) would be a cost-effective way to deliver the event. High quality films are available on a range of subjects and there are many local film makers who would be happy to have their films aired. Other sectors could be drawn in to provide film volunteer opportunities such as Alchemy Films and creative groups such as Moving Image Makers Collective. Suggest 8 screenings over 3 days with guest speakers from the industry. Circa £26K per annum (does not include marketing and promotion)
- Wildlife photography/film competition (request visitors and locals donate their best wildlife images – yearly competition) mostly web based with a yearly exhibition alternating between DG/SB (could provide content for Wild Film Festival and this could be a further selling point/winner's prize). Part time (2 day) post for 3 months per year and development costs/exhibition space, etc., circa £8K (does not include marketing and promotion)
- Nature Festival - yearly rolling programme (i.e., Doors Open Day, Scottish Borders Walking Festival and Wild Spring Festival) that is hosted by a different town each year alternating between DG/SB). Towns bid to host the festival and organisation is undertaken by community volunteers with annual part time paid coordinator post. Plans for the Golden Eagle Festival in Moffat this year will attract visitors from the region (and could provide further opportunities for another destination trail) and out with and if linked in future years to wider sites and activities, could be the springboard for a future region wide nature festival. Coordinated and cooperative efforts would allow existing nature festivals such as Wild Eskdale to be combined into a region wide offering. Part time coordinator post (3 days) 4 months per year circa £8K (does not include marketing and promotion)

Other

- Access licenses for commercial use of national forest requires further discussion with FLS to see if licencing for wildlife guide access can be made easier. Also, wider consideration of potential opportunities for business development such as installation of off grid huts, hides and increased car park capacity of FLS sites would assist the sector in offering more choice and variety for visitors.
- There are two national park campaign groups and suggest discussion with SUP to advise on biosphere idea for Scottish Borders <http://www.borders-national-park.scot/>
<https://www.gallowaynationalpark.org/>
<https://www.gsabiosphere.org.uk/caring-for-the-biosphere/what-is-the-biosphere/sustainable-development/>

'Tourism is one of seven growth industries in Scotland, contributing more than £4 billion to our economy each year. The natural environment is a key tourism asset with our scenery and landscapes being the highest motivation for people to visit Scotland. Spending on nature-based tourism is estimated to contribute nearly 40% of all tourism spend supporting 39,000 full time equivalent jobs.' NatureScot

Key Objectives of Developing Nature Based Tourism in South Scotland

- Build on our tourism assets to create a more sustainable economy
- Highlight the south of Scotland as the gateway to Nature Based Tourism
- Celebrate the wealth of natural and cultural heritage the south has to offer

- Align transition to net zero and responsible custodianship of the natural environment to ensure longevity
- Provide quality visitor experiences that keep people coming back for more
- Build capacity, cohesion and growth within the sector
- Protect, preserve and value natural assets
- Promote responsible wildlife watching, tourism development and custodianship
- Provide educational opportunities and routes in for young people
- Deliver upskilling and career change opportunities
- Offer high quality events that showcase the south
- Develop high quality new products
- Provide future proofed infrastructure to capitalise on natural assets

“I probably need to get a survey done on wildlife on farm so that I have some statistics?” Survey Respondent

The Value of Developing NBT

The table below outlines the Value of Tourism to South Scotland - Data source Visit Scotland Regional Factsheets 2019

Table 5: Value of Tourism to south Scotland

| Types of tourism by region - Visit Scotland Regional Factsheets 2019 | Visits | Value £M |
|--|-----------|----------|
| Dumfries and Galloway | | |
| Overnight tourism | 735,000 | 148 |
| Of which domestic overnight tourism accounts for | 699,000 | 131 |
| Day tourism | 5,721,000 | 239 |
| UK visitors stayed an average of 3.3 nights spending an average of £53 per day International tourists stayed an average of 11.2 nights spending £44 per day | | |
| Scottish Borders | | |
| Overnight tourism | 369,000 | 72 |
| Of which domestic overnight tourism accounts for | 340,000 | 63 |
| Day tourism | 2,705,000 | 72 |
| UK visitors stayed an average of 3.3 nights spending an average of £55 per day International tourists stayed an average of 4.4 nights spending £67 per day | | |
| Combined total for south Scotland: | | |
| Overnight tourism 1,104,000 visits with a value of £220M | | |
| Day tourism 8,426,000 visits with a value of £311M | | |

- Of the top ten visitor attractions in Dumfries and Galloway, 7 were nature-based sites and 3 were heritage. **Galloway Forest Park** was top of the leader board with **385,437 visits**
- Of the top 10 visitor attractions in Scottish Borders, 4 were nature-based sites and 6 were heritage. **Tweed Valley Forest Park** was top of the leader board with **347,763 visits**

In their 2010 report ‘Valuing Nature Based Tourism in Scotland’, NatureScot (SNH) estimated the value of nature-based tourism to be just under 40%. If we apply this to the figures in the table above, overnight stays can be valued at £88M and Day tourism at £124.4M or £212.4M combined for nature-based tourism in south Scotland

Based on these figures it would be reasonable to anticipate a **10% increase in Day tourism** and a **5% increase in Overnight tourism** if the measures as outlined were implemented over a 3-year period. This would equate to: £4.4M in Overnight tourism and £12.4M in Day tourism. **Combined total £16.8M**

“A Biosphere or similar in the Borders would be excellent, push for National Park status and promotes the exceptional coastal, countryside and hills that we have on our doorstep. partner up with D&G and shout loudly and positively about the South of Scotland. Specific, relevant marketing, securing funding to businesses to grow this offering that bring value area/economy.” Survey Respondent

Possible Projects and Outline Costs

The following table summarises possible projects and outline costs from table 4 (above).

Table 6: Outline Costs

| Item | Cost Per Annum Excluding VAT (where applicable) | Notes |
|--|---|--|
| Nature Based Tourism Posts | | |
| 2 x 0.6 Development Officer pro rata £35K | £42,000 | Suggest 3-year posts, salary £35K pro rata |
| Web and Products | | |
| Wild Seasons Website upgrade | £10,000 | |
| NBT Web/Social Media Content Administrator 3 months per annum | £9,000 | Yearly ongoing cost, £36K pro rata |
| Explore for a Day Leaflet Conversion SB/DG to e-flipbooks or combined south Scotland version | £1,100 | NBT/Heritage site leaflets are widely available in paper format, very few digitised versions. Can be converted to e-flipbook for around £30 per page |
| Training | | |
| Local Training Courses (10 persons per block) £4.5K x3 per annum | £13,500 Training/venues | Suggest these are subsidised and available over a 3-year period = £40,500 over 3 years |
| Infrastructure | | |
| Wildlife Hides x12 at £7K (4 installations per year over 3 years) | £28,000 Infrastructure | £84,000 over 3 years |
| Showcasing | | |

| | | |
|---|---|--|
| Wild Film Festival 8 screenings over 3 days in one venue. Includes venue costs, films and speakers, event management and staff | £26,000 Core costs £10,000 Marketing/promotion | Suggest a 20% increase per annum in overall costs to expand the festival |
| Photography/Film Competition Coordinator 0.4 x 3months plus exhibition costs, 1 venue | £8,000 Core costs £4,000 Web based marketing/Promotion | Suggest a 20% increase per annum in overall costs to expand the festival |
| Nature Festival Coordination 0.6x 4 months | £8,000 Core costs £10,000 Marketing/promotion | Suggest a 20% increase per annum in overall costs to expand the festival |

“There are informal links between our business, the Mull of Galloway Experience and Logan Botanical Gardens; some form of joint promotion might benefit us all.” Survey Respondent

Explore for a Day Review, Scottish Borders and Dumfries and Galloway

Both Explore for a Day leaflets were reviewed to ensure content was still current in both regions. All sites were checked and a separate list (copy can be forwarded if requested) has been compiled of website information and site changes where applicable. SSDA are keen to include the itineraries on the Scotland Starts Here app, alternatively, these could be converted to e-flip books as the NC500 Explore leaflet

<https://www.flipbookpdf.net/web/site/fe24397c62c4df891cebbd8d82215cb5203c62a6FBP19862937.pdf.html>

The cost of creating a flip book from the existing PDF is roughly £550 (£26.50 per flip book page and the standard Explores seem to come out at about 20 flip book pages) which is a small amount of investment for digital conversion. Alternatively, the Dumfries and Galloway and Scottish Borders itineraries could be combined (as NC500 which combines 3 titles) into one south Scotland e-flipbook.

“Coordinated Borders Wildlife group to keep track of wildlife sightings across the borders ie. wildlife spotted in one area could be easily communicated to other land owners/wildlife tourism businesses highlighting species that could spread into neighboring areas.” Survey Respondent

Conclusions

An increase in tourism alongside escalating climate change will have an effect on the natural environment and it is of the utmost importance that we encourage responsible tourism development, wildlife watching practices and custodianship to ensure protection, longevity and sustainability of our natural habitats and species. This may be achieved by encouraging all NBT providers to agree to a charter of responsible tourism such as the Galloway and Southern Ayrshire Biosphere Charter <https://www.gsabiosphere.org.uk/wp-content/uploads/2015/09/BIOSPHERE-CHARTER-Leaflet.pdf> The pandemic has highlighted stress points in our infrastructure provision (car parking, lay-by's, amenities, camping areas, etc.) throughout the south and these need to be addressed if we are to further nature based and wider tourism initiatives whilst protecting our landscapes from increased footfall. Consideration must be given to future infrastructure needs (accommodation, electric vehicle charging points, power grid, 5G, etc.) to ensure our ability to attract and keep visiting tourists and our local workforce in the region.

“We've got a lot of ingredients in place we just need help mixing them together.” Survey Respondent

Budget cuts have seriously affected local authority ranger services (Scottish Borders Council used to employ 12 in their ranger service, there are currently 4, National Trust have also decreased staffing levels). For NBT to flourish these roles are vital to proactively educate the public, manage routes and reinforce the use of outdoor codes. There is a need to train more rangers and guides as the slack is currently being picked up by untrained community groups and businesses. On a positive note, FLS are currently recruiting 8 seasonal Rangers in SB/DG for 2021 in Tweed Valley and Galloway Forest Parks <https://forestryandland.gov.scot/jobs/featured-jobs/seasonal-ranger> If these positions could be available annually and widened out to other national forest areas this may mitigate some of the issues highlighted.

Young people have been affected by the diminishing opportunities to engage in outdoor education programs which provide routes into careers in NBT. There is a national issue around accredited training provision for nature-based guides which can be addressed in the short term by buying in services for bespoke courses but perhaps it's time to 'raise our game'. The south could aspire to becoming a national leader for nature-based tourism training by providing access and accredited courses, alongside intern and apprenticeship opportunities through both colleges. This would provide gateways for young people to enter the sector, support the wider tourism industry and highlight the south to a far greater market.

An audit of sites, accommodation providers, services and groups would provide an opportunity to identify gaps, link existing business/initiatives, build on successful models and create new products and services. If this were widened to include built heritage this would create further crossover and diversity of offerings. Of the top 20 visitor attractions (top 10 DG and Top 10 SB, VS 2019) in south Scotland, 11 are nature based and 9 are built/cultural heritage. By identifying and promoting sites that possess both assets it would be possible to increase footfall through cross promotion and provide gateways to a wider range of sites.

"Promotion and financial help to diversify our business to attract national audiences" Survey Respondent

The estimated value of NBT in south Scotland is currently £212M and accounts for 40% of the tourism market (see table 5). If efforts were concentrated through provision of expert help for businesses, training, dedicated website/social media, highlight events and by linking sites and trails there is scope to increase south Scotland NBT income and market share. The level of investment coming into the south through the Borderlands Inclusive Growth Deal, Edinburgh and South East Scotland City Region Deal and South of Scotland Enterprise will produce a knock-on effect across the entire industry by creating further diversification and innovation opportunities within the tourism sector as a whole.

"Grants for improving paths & information materials / signs & infrastructure." Survey Respondent

The nature and nature-based tourism offerings of south Scotland need a far greater presence on the web. Locals and tourists, for the most part, have little appreciation of the diversity and year-round spectacle of wildlife on offer. To create a cohesive and coordinated NBT offering for south Scotland a number of strands will need to be aligned such as training routes from access level through to accredited courses, business and product development, targeted marketing, dedicated online presence for wildlife and habitats and a booking route for tours, accommodation and services, funding/grant support for business, infrastructure investment, grass roots through to wider industry representation for NBT, badge and quality assurance schemes, enhanced communication channels and partnership working.

"Tailored itineraries that I could share with guests prior to them staying so they pre-book Local knowledge about what's around / accessible etc." Survey Respondent

There is scope to create new products, businesses and services through a large landscape, south Scotland perspective such as developing Rivers Tweed and Annan as a lowland cultural and natural heritage route or by

harnessing the opportunities around commercial forestry plantations to alleviate the pressure on rural community housing, provide unique experiences for visitors and create new trails. Developing cluster-based tourism models around key sites or areas, quality products that align to our seasonal offerings and delivering high quality nature-based events can expand and enhance a year-round tourism offer. By aligning business, education and environmental protection it is possible to provide a sustainable long-term industry for south Scotland through increased nature-based tourism.



Image: Great Polish Map of Scotland Gethin Chamberlain

“To create new and meaningful dialogue regionally across the south of Scotland on nature-based tourism and activities. to work with businesses and identify key areas for growth to provide support on habitat management, and set out a programme of discoverability to understand what the wildlife looks like in our own immediate vicinity and how we can help communicate that to visitors while they are on walks or cycle rides.”

Survey Respondent

Julie Nock April 2021 julienock@sup.org.uk