

THIS FEASIBILITY STUDY WAS CONDUCTED BY A PARTNERSHIP OF THREE SUSTAINABLE TOURISM CONSULTANTS:

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Executive Summary



FEASIBILITY STUDY FOR AN EAST KENT NATURAL PARK





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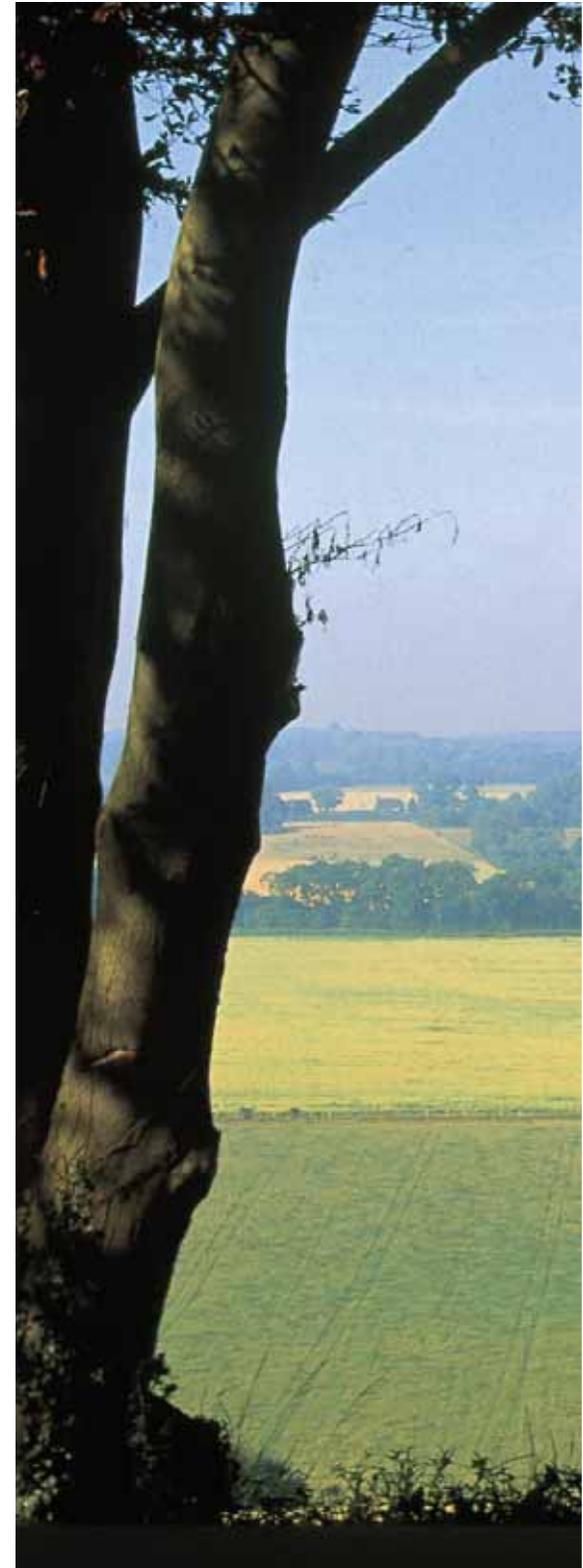


The proposed development of an “East Kent Natural Park” is a key component of our 10-year strategy for the future of East Kent. The concepts presented in this document focus on providing an important leisure amenity for local people, as well as helping to promote tourism, in a way that strikes the right balance between the economic revival of our rural communities and the need to maintain and improve our natural environment.

Quality of Life is of major concern to us all and it is in all our interests, and of those generations to come, that we engage in the forthcoming consultation on the way forward for the Natural Park. Under the auspices of the East Kent Partnership it is proposed to engage all those who have an interest in the development of the concept, be they directly involved in the project, are keen to contribute to the philosophy behind the Park or to the actual implementation of the concept, or simply who wish to express a view.

This is an exciting concept which, managed creatively and sensitively, can provide a wonderful opportunity for us all. I urge you to join the debate and contribute to the success of this venture.

Chairman of the East Kent Partnership



1. Scope of Study

The study outlined in this document aims to develop the concept of an “East Kent Natural Park” in order to deliver East Kent Partnership’s stated objective of:

‘Supporting and developing opportunities for rural and “green” tourism and encouraging sustainable leisure and recreational uses of the countryside.’

The study brief required the project team to explore ways in which the natural and built heritage in rural areas of East Kent could have an increased role in the regeneration of the region by developing products to grow the rural tourism market in the area. At the same time, the brief required that these resources be protected and enhanced and that the outputs of the study provide demonstrable benefits to leisure, tourism, biodiversity, the historic environment and sustainable economic development.

The study outputs complement, and add value to, the cultural regeneration strategy for the East Kent area, as the combination of culture, history and nature will serve to broaden the area’s appeal and make it more attractive to both residents and visitors.

The study area consisted of the administrative areas of Canterbury, Thanet and Dover, focusing on the land-based rural sector. Urban areas were therefore not included.





2. Principles of Ecotourism

Opportunities for rural tourism development were explored in East Kent and it was vital that the resulting recommendations provided explicit benefits to the natural environment (including biodiversity), the historic environment and sustainable economic development in the area. Consequently the forms of rural tourism development that were explored were ones that also embraced the overarching principles of ecotourism.

Ecotourism means different things to different people. For the purposes of this project ecotourism principles are therefore defined and encapsulated by forms of tourism that:

- Have low environmental and social impacts i.e. managed to be ecologically and culturally sustainable
- Contribute to the long-term conservation of the natural, cultural and historical resources of the area visited
- Deliver net benefits to local communities, livelihoods and socio economies sufficient for local residents to value the natural, cultural and historical resources within which they live
- Involve education and interpretation of the natural, cultural and historical environments

Accordingly all references to rural tourism in this document are forms of natural and historical heritage rural tourism underpinned by the principles of ecotourism as described above.

3. Stakeholder Engagement

The views and opinions of a selection of stakeholders operating in the project area were solicited during the study. In total 48 stakeholders were consulted representing a diverse range of organisations and professional backgrounds including:

- Conservation & heritage bodies
- Public sector organisations
- Development bodies
- Tourism specialists
- Tourism suppliers
- Local businesses
- Farming bodies
- Community representatives

The stakeholders' input informed this preliminary concept development phase of the initiative and proved invaluable in identifying the area's wealth of natural and historical resources.



4. Vision

An important aspect of the study was to formulate and articulate an overall vision for the “East Kent Natural Park” concept that multi-stakeholders can commit to and be motivated by. During the study period this vision was researched and refined and constitutes:

The enhancement of the rural East Kent environment and the quality of life of local communities through:

- Enhanced conservation of biodiversity
- Environmental improvement
- Creation of a stronger rural economy and community
- Increased opportunities for access to the countryside and the promotion of healthy living
- Development of sustainable rural tourism linked to the natural and historical heritage assets of the area

In order to achieve this vision a strategy with two clear facets has been developed:

1. To secure environmental and biodiversity gains by conserving, enhancing, and expanding the area’s natural habitats.
2. To achieve rural regeneration and local economic gain through the development and marketing of sustainable forms of rural tourism that celebrates and utilises the area’s natural, cultural and historical environments.

A concerted and cooperative effort will be required by all stakeholders to realise the vision and successfully implement the strategy. This will require the involvement and commitment of conservation and heritage organisations, economic development support agencies, public and private sector organisations, tourism businesses and local communities.

5. Geographical Area of the Initiative

The geographical area covered by the initiative consists of two key parts - a Regeneration Area and within this a Conservation Gain Area.

Area 1. Regeneration Area - Rural Tourism Development & Marketing Area

- A loose triangle (not tightly defined) of East Kent between Canterbury, the Thanet coast and Dover. Excluding urban towns with the exception of Sandwich and Deal. Including all heritage coastlines and the eastern most section of the Kent Downs.
- Individual natural heritage brands within the destination should be marketed in an integrated way (including Stodmarsh NNR, the Blean, Kent Downs AONB, White Cliffs Heritage Coast, Thanet Coast, Sandwich & Pegwell Bay NNR), and this marketing should be conducted alongside and in coordination with the historical brands in the area.

This area is one of the ‘Priority Regeneration Areas’ identified in the Regional Planning Guidance for the South East where it is stated that rural tourism development could deliver significant economic benefits. This guidance document goes on to state that:

“Tourism, recreation and leisure activity in rural areas can bring significant economic, social and environmental benefits if carefully managed and, in many instances, will serve to underpin the continued viability of local services, including village shops, country pubs and agricultural enterprises”.

The geographical area defined for regeneration not only meets this government planning agenda, but also, importantly, has the raw natural and historic ingredients that will enable rural tourism to be developed.

Area 2. Conservation Gain Area – The Wetland Creation Area

- A new wetland of reed bed, open water, marsh and pasture covering the area from Stodmarsh NNR north to Reculver, along the Stour Valley (Wantsum and Ash levels) to Pegwell Bay, and southwards to the Lydden Valley i.e. the Environment Agency floodplain area. This would create a wetland area of almost 10,000 Ha.

A GIS map follows that visually depicts these two areas.



Map produced by *Stephane Gueritte*, GIS specialist: www.gueritte.net email: stephane@gueritte.net



6. Conservation Gain Area

The twin influences of international obligation and legal requirement have been expressed through UK government policy and legislation and are emerging as important planning tools for the future. Draft Planning Policy Statement 9 provides detailed advice on how local authorities should recognise and conserve important elements of biological (and geological) diversity, while Appendix 1 of the draft Natural Environment and Rural Communities Bill (published in Feb 2005), if passed without revision, will require local authorities to take into account biodiversity conservation. This will mean that nature conservation will become part of the mainstream in planning.

This growing governmental agenda towards biodiversity gain is similarly reflected in the draft South East Plan. Here the 'conservation gain area' detailed in this study is identified as an area of strategic opportunity for biodiversity improvement in the region. The vision of creating a new wetland in East Kent should, therefore, be met with support from Natural England, national, regional and local public sector bodies and NGOs. Importantly, this is an area where some regional biodiversity targets can be delivered at landscape scale.

Creating a new wetland on the scale proposed will also bring many benefits to the area. Specifically it will enable the initiative's vision to be realised through:

- **Enhanced conservation of wildlife and biodiversity / environmental improvement** - Out of the key habitat types prevalent in East Kent, the rarest from a UK perspective are wetlands and downlands. The priority for downland conservation in an East Kent context is the maintenance of existing habitats, for wetlands it is the creation of new habitats.
- **Creation of a stronger rural economy and community** – Tourism's potential as a tool for regeneration within the project area will be unlocked and greatly enhanced by the stimulus provided by this habitat creation initiative. The development of a new natural 'star attraction' with a high profile will raise awareness and demand. The initiative will attract new regional, national and international visitors and bring about a step change in the economic fortunes of East Kent through rural tourism.

- **Increased opportunities for access to the countryside** - The new wetland habitat will provide increased opportunities for access to the countryside by local residents of East Kent, through the provision of walking and cycling trails throughout the area for people of all abilities.
- **Promotion of healthy living and improved quality of life for local communities** - Walking and cycling opportunities in the new wetland area will also contribute to the promotion of healthy living amongst the local community. Additionally the beauty of the area will benefit the mental well-being of the community. Collectively these changes will considerably improve quality of life in the project area.

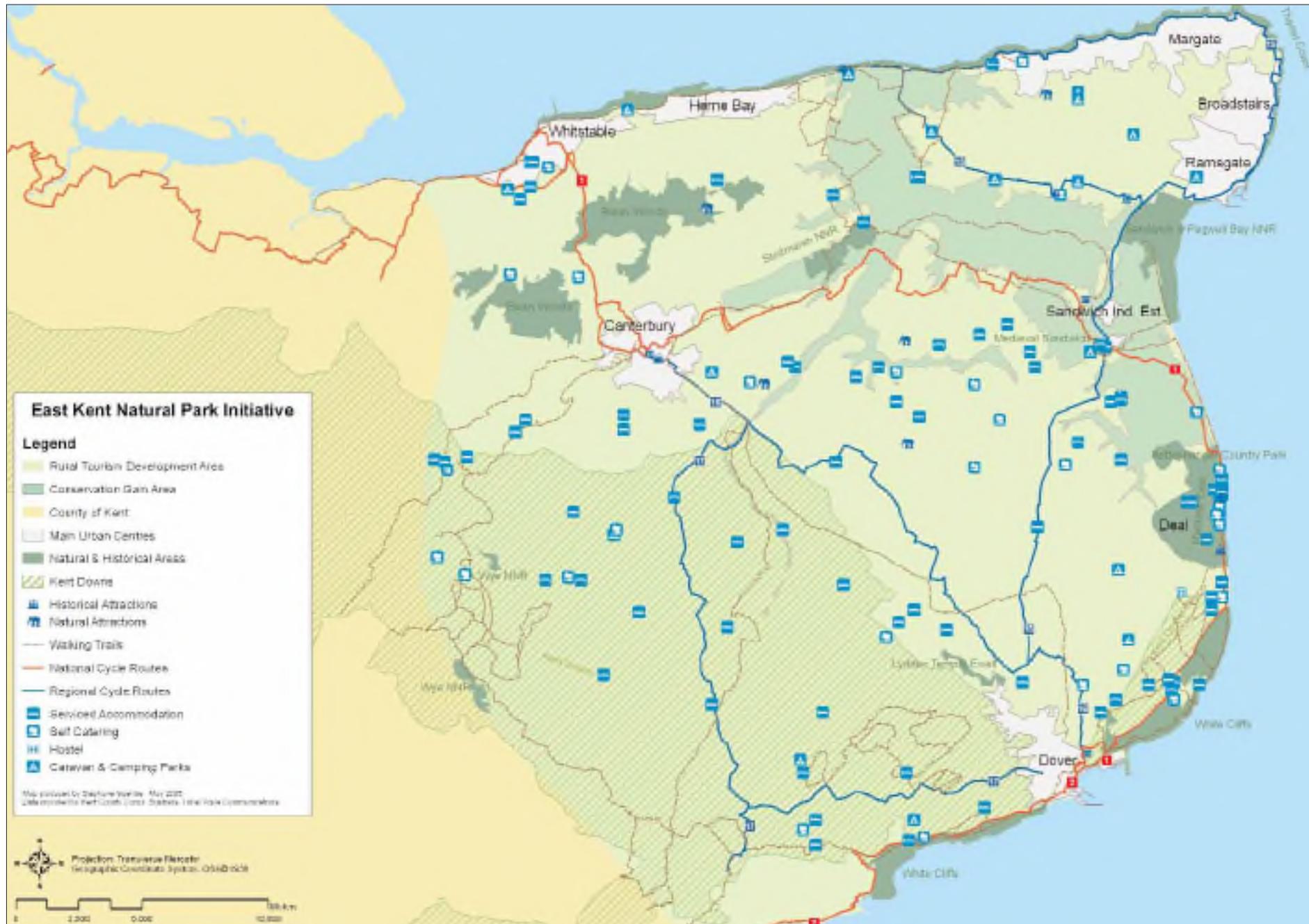
Whilst the key conservation gain recommendation in the study is the creation of a new wetland habitat, it is recognised that it is important to conserve the complete range of habitats in the area. Programmes are already underway to expand the ancient woodland complex at Blean and to ensure that current chalk grassland is maintained. It is vital that such initiatives continue to be developed, supported and linked to, if the full range of the area's biodiversity is to be conserved and enhanced into the future.

7. Asset Mapping Exercise

An Asset Mapping Exercise was conducted to identify the key natural and historical attractions of the area from a rural tourism perspective. These are displayed on the GIS map that follows and emphasise the range of internationally important diverse natural habitats and environments in the area along with its wealth of natural and historical visitor attractions. Additionally there are currently around 134 quality graded accommodation establishments in the area¹ ranging from hotels, B&Bs and guesthouses (81), self-catering (34), camping & caravanning sites (18) and hostels (1).

The Asset Mapping Exercise identified gaps in current product provision and infrastructure (both issues are covered later in this document), as well as the need to carry out an accommodation study and a Public Rights of Way and access audit to take the initiative further.

¹ In rural areas of East Kent but including Deal and Sandwich.



8. Current Economic Contribution of Rural Tourism

The current economic contribution of East Kent's natural and historical environments to the local economy, through rural tourism, is low. Research shows that current visitors to rural East Kent are predominantly East Kent residents and that 'staying visitors' to the area gravitate to the honey pots of Canterbury, Whitstable, Dover and the Thanet coast.

Economic data suggests that the rural area of East Kent does not derive as much visitor benefit as would be expected from its proximity to Canterbury. For example, whereas approximately one third of day visitor expenditure in Kent as a whole (£185 million p.a.) benefits rural areas of the county, only 16% (£42 million p.a.) of day visitor spend in East Kent benefits rural areas. The figure for Norfolk, a key nature tourism destination in the UK, is £698 million p.a. (57.0% of overall day visitor spend). In short, considerable potential exists to increase the contribution of rural tourism to the East Kent economy.

9. Opportunities to Enhance Economic Contribution

The future contribution of rural tourism to the local economy is limited by the area's relative remoteness, a lack of awareness of the project area as a tourism destination, and strong competition from other rural destinations. The area additionally has no 'star' natural attraction. The potential for rural tourism development within the project area therefore depends largely upon the stimulus provided, and the publicity surrounding, the proposed large-scale wetland habitat creation initiative. The initiative will put the area 'on the map' as a rural tourism destination and increase awareness and visitation. Importantly, it will also significantly enhance the tourism product offering in the area sufficient for it to take market share away from competing rural destinations.

Significant opportunities exist to enhance the current contribution of rural tourism to the local economy. These also centre on the development and marketing of rural tourism product that meets the needs of carefully selected target market segments. In addition infrastructure improvements are required, product linkages must be developed, and the appeal of the area as a rural tourism destination must be enhanced.

A. Target Markets

Experience from other rural tourism projects indicates that the types of users are likely to be:

- Specialist short break takers e.g. birders, botanists, naturalists, historians etc.
- Recreational short break takers
- Empty Nesters (45-70 yrs, children left home)
- Wealthy Retired Couples (55-75 yrs)
- DINKS (Dual Income No Kids, 25-45 yrs)
- Caring Parents (25-45 yrs, children 5-15, families who care about their children's education and physical well-being both at school and at times of leisure)

Geographically, the recreational short break takers targeted will reside in a 3-4 hour drive time of the area i.e. London, Home Counties, Midlands, 'Near Europe', whilst the 'specialist' markets will be prepared to travel further.

B. Rural Tourism Product Development

- Create linkages between existing product
- Develop themes
- Develop new product centred on birding, walking, cycling and local food and drink

C. Infrastructure Improvements

- Improve quality, quantity and range of accommodation i.e. from camping barns through to country house hotels
- Improve access throughout the area i.e. plug gaps in footpath/cycle network; create new circular walks/cycle routes linked to tourism assets; pedestrian access across Stour River in Wantsum/Ash Levels; provide links to/from public transport hubs e.g. cycling trails between Betteshanger Country Park and Sandwich/Deal railway stations

- Improve interpretative materials and visitor management strategies i.e. signage/way-marking; zoning; setting carrying capacities; managing visitor impacts; information provision e.g. maps, green guide to area and website.

D. Raising Awareness of Area and Products

- Brand development
- Coordinated marketing approach between different agencies/tourism product suppliers

E. Improving Appeal of the Destination

- To achieve significant regeneration the appeal and competitiveness of the destination needs to be considerably enhanced through the implementation of a branding strategy and the development of the 'star attraction' – the new proposed wetland 'Conservation Gain Area'

10. Key Rural Tourism Product Development Areas

1. Bird watching (for specialist and recreational markets)

- Bird watching is the largest wildlife tourism market segment globally
- 2.85 million adults participate in bird watching in Britain, 23% of which live in the South East
- The wetland area Titchwell RSPB Reserve in North Norfolk receives over 100,000 visitors a year, spending £1.8 million in the local economy and supporting 39 direct and indirect full-time equivalent jobs
- Project area has a rich diversity of bird habitats (and hence birding interest) – need to promote this collectively, rather than site by site as currently
- New proposed wetland reserve will put area on the map for birders – star attraction nationally



2. Recreational cycling (traffic-free, easy cycling)

- Cycle tourism in the UK is worth £635 million per year with the forecast for cycle tourism across Europe estimated to rise to £14 billion per year within 20 years
- With its wealth of traffic-free cycling routes East Kent has the potential to increase its share of the recreational cycling market – particularly for families and inexperienced cyclists
- Betteshanger Country Park and its proposed cycling facility will considerably enhance the attraction of the area to cyclists
- Cycling tours linked to historical and natural product in the area would be appealing to recreational cyclists

3. Recreational walking (linked to historical, natural and food & drink product)

- Walking is the most popular outdoor recreational activity in the UK by far, with 41% of adults regularly walking, equating to ca. 18.5 million people; One in five British people take part in walking whilst on a leisure short break
- With its network of gentle walking routes the project area has the potential to attract recreational walkers by linking routes with natural and historical environments along with the food and drink offer

4. Local produce/gastronomy

- There has been a considerable increase in awareness of the importance of food and drink to tourism, and vice versa, in the last ten years. Expenditure on these items accounts for 46% of visitor spending in the countryside
- There are a wealth of local food producers, crafts people, restaurants and pubs throughout the project area that could be encouraged to engage further in rural tourism

11. Sense of Place

The East Kent rural area's 'sense of place', which will be vitally important when defining the area as a competitive and unique rural tourism destination, is summed up in the following brand strategy diagram.

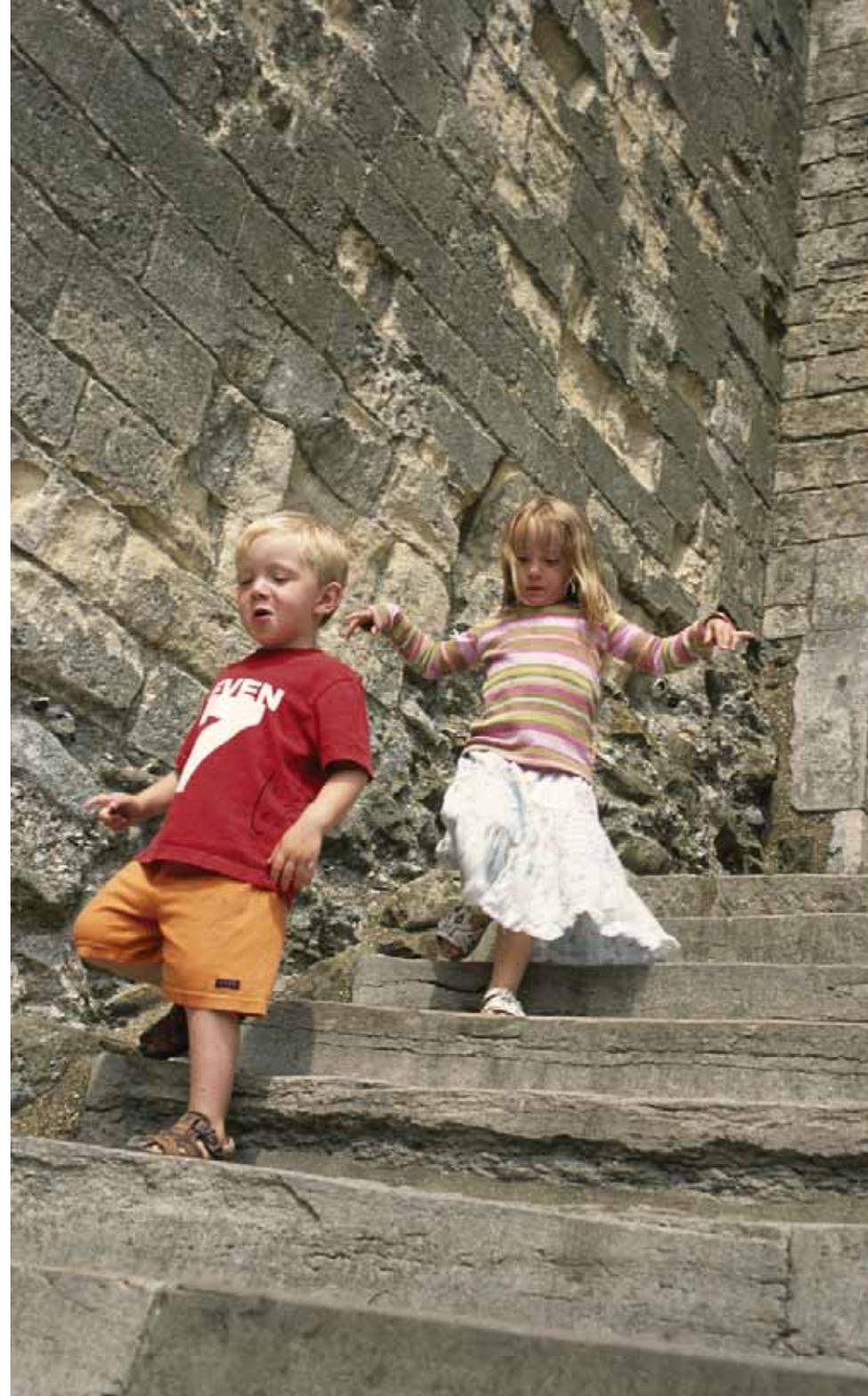
The brand positioning fits in well with the 'Kent – Garden of England' tourism brand, drawing as it does on Kent's 'countryside' and 'historical' brand values and its 'revitalising' and 'enriching' offer. This is important as the rural East Kent brand needs to sit under the wider, motivating Kent brand.

Brand Strategy



The Brand Positioning – The Heart of the Brand

Kent's natural and caring, sustainable, cyclist-friendly area with prolific bird life, nature tourism activities and a wealth of gateway/frontier history, offering opportunities for relaxation, revitalisation, discovery and enrichment.



12. Delivering the Vision

Various actions will be required to deliver the initiative's vision and associated strategies. Proposals in this area include:

ACTION	STEPS TO BE UNDERTAKEN
Secure stakeholder commitment to the vision	<ul style="list-style-type: none"> • Stakeholder workshop
Establish a management structure and delivery process	<ul style="list-style-type: none"> • Management structure devised • Delivery process set up • Integrated quality management of the project area • Visitor management
Secure commitment and involvement of the wider community	<ul style="list-style-type: none"> • Public awareness raising • Community participatory workshops • Partnership product development
Develop funding strategy and business plan	<ul style="list-style-type: none"> • Sustainable business plan development • Funding strategy with short, medium, & long term initiatives linked to funding programmes
Develop the conservation gain area	<ul style="list-style-type: none"> • Facilitate collaborative working with conservation organisations • Audit to establish ownership of land • Habitat creation – Phase 1 – formulation of land assembly plan and funding strategy • Habitat creation implementation • Visitor management strategy • Existing habitat maintenance and expansion • Long term land management strategy
Establish a brand image for the destination	<ul style="list-style-type: none"> • Test branding strategy • Destination name, logo and strapline development
Identify and develop rural tourism product	<ul style="list-style-type: none"> • Birding, cycling, walking, local produce and gastronomy product development • Other special interest product development (archaeological, painting, botany, etc) • Develop product linkages
Improve and develop visitor access and infrastructure	<ul style="list-style-type: none"> • Accommodation audit and study • Public Rights of Way and access audit • Trail development study and themed trails linking villages, attractions & amenities • Scoping study – Betteshanger Visitor Centre
Market and promote the product and the project area	<ul style="list-style-type: none"> • Marketing plan development • Marketing of birding, cycling, walking, local produce & gastronomy products • Marketing of project area - conservation, natural and historic product linkages • Green Tourism Guide • Dedicated website
Provide business support for SMEs²	<ul style="list-style-type: none"> • Planning and business advice to assist rural businesses tap into the developing tourism market • Increase networking between tourism businesses
Monitor and evaluate the project	<ul style="list-style-type: none"> • Set key performance indicators • Review performance • Refine and enhance performance • Measure the impact of tourism on the environment and local community

² SMEs – Small and Medium Sized Enterprises

A key action will be the establishment of a delivery process, with associated management structure, to drive the vision forward. The objective of this delivery process will be to bring together key stakeholders to work cooperatively to achieve rural tourism development, habitat enhancement and regeneration in the project area.

Along with driving the vision forward, the management structure would have a role in consulting with and communicating the area's priorities to regionally focused bodies (such as KCC, Locate in Kent) as well as appropriate South Eastern and Continental agencies (e.g. SEEDA, Tourism South East and the EU). This would ensure that the project area's rural assets are recognised as part of the bigger picture of management, regeneration and investment for the region.

Dedicated staff resource (e.g. an independent project manager) will be required to co-ordinate and manage the development of the initiative along with external technical advice.

The remit of the proposed delivery process and management structure is suggested as follows:



13. Conclusion

The vision presented in this document is credible, achievable and most importantly will secure commitment from the various stakeholders operating and involved in the project area. The delivery of the vision will add value to the local environment, generate meaningful contributions to the local economy and enhance the livelihoods, quality of life and well-being of local communities. This vision is a stimulating and unique opportunity which will be achieved not only through conservation actions and the development of rural tourism initiatives in the project area, but also by the commitment and effective communication and cooperation of all those involved.

Further Information

For further information on this study or to request an electronic version of the consultants' full report contact:

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