

Dungeness Complex Sustainable Access and Recreation Management Strategy (SARMS)

Supporting Document 3 – Policy, Visitor Economy and Strategic Initiatives

Prepared for Shepway District Council and Rother District Council

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Introduction

About this Report

This document is one of a suite of documents which together form the Sustainable Access and Recreation Management Strategy (SARMS) for the Dungeness complex of protected sites.

This report is considering the visitor economy because recreation and tourism visits are an identified pathway of impact in the joint Rother and Shepway Habitats Regulations Assessment (2011). Several policies in both local plans could not be screened out as not causing likely significant effect in combination with other plans and projects.

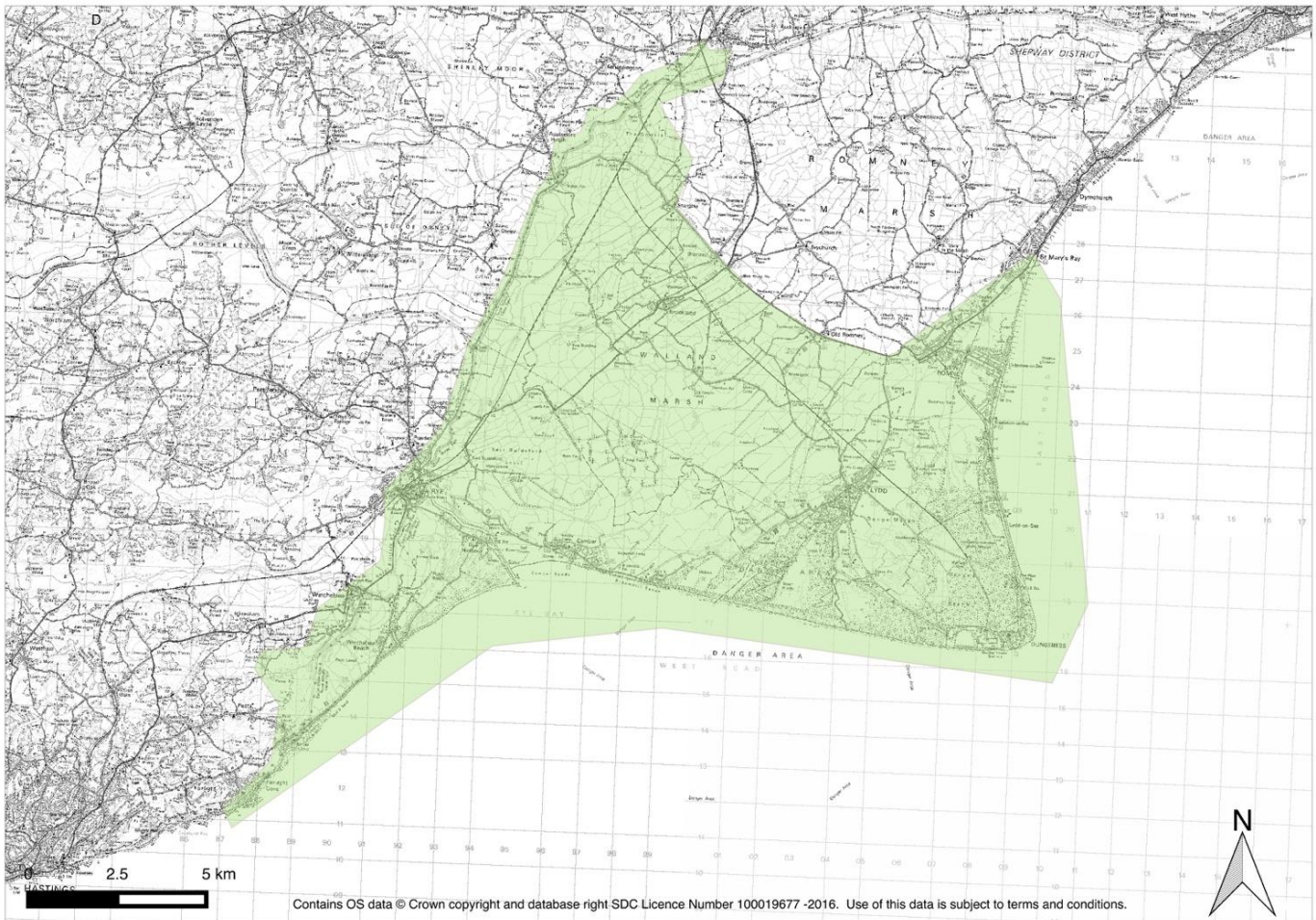
Tourism is also a significant part of the local economy for the Strategy area, especially in the coastal areas.

This report provides an assessment of the visitor economy and trends which are relevant to the Strategy area (see Plan 1). The report includes a review of the role of tourism in the local economy, tourism facilities, activities and accommodation relevant to the strategy area, an overview of relevant local policy and strategies, and an outline of the strategic initiatives operating in the Strategy area.

The documents which form the complete SARMS are:

- Main Report – this report brings together the findings, draws conclusions and sets out an action plan;
- Supporting document 1 - Nature Conservation Background and Assessment
- Supporting document 2 - Access and Recreation Assessment
- **Supporting document 3 (this report) - Policy, Visitor Economy and Strategic Initiatives**
- Supporting document 4 - Visitor Assessment

Plan 1: The Strategy Area



Rother is a coastal district situated in the far eastern corner of East Sussex. The population is around 87000, half of whom live in the main urban area of Bexhill-On-Sea. The area of Rother included in the strategy area is largely rural, except for the historic town of Rye. This part of Rother district is among the most deprived areas in the district, and its economy relies to some extent on the visitor economy.

Shepway is a south-eastern coastal district in Kent, and has a border with East Sussex and Rother. The population is around 108000, most of whom live in the coastal towns of Folkestone and Hythe (beyond the Strategy area). The Strategy area includes Romney Marsh which has a population of around 20000. Shepway is a significantly rural area, with relatively low economic activity and employment rates.

The Local Economy and Policy Context

Economic Drivers

Rye and New Romney are the major economic centres in the Strategy area, accounting for a high proportion of the area's businesses, employment and population. The nuclear sector at Dungeness also continues to play an important role in the local economy.

The visitor economy is a key economic driver for both Rother and Shepway; and the volume and economic value of visitors to both districts is increasing. In Rother, almost 20% of jobs are supported by tourism activity, and in Shepway the figure is just under 13%. The rich and diverse landscape and coastline offer distinctive destinations; attracting different market sectors and providing opportunities for a diverse tourism offer.

This coastline was once the traditional destination for holiday-makers. However, the patterns of tourism have changed; for the most part, the coastal resorts are no longer the destination for annual holidays, and some coastal areas are struggling economically. Visitors are now taking advantage of the ease of travel to the area from London and beyond, and are taking short breaks or making day trips.

Shepway's Economic Development Strategy 2015-2020 identifies tourism as an important and growing sector in Shepway's economy; and recognises the coast as one of their major economic drivers, with the tourism sector seen as offering opportunities for growth in the coastal area.

Shepway's Economic Development Strategy identifies Romney Marsh as one of three economic sub-areas of the district. The internationally important natural and cultural heritage of Romney Marsh is described as 'both an opportunity and a constraint'.

The nuclear power stations at Dungeness are a major local employer in an area with few other large employment opportunities. They have been central to the Romney Marsh economy for many years, contributing some £50 million¹ to the local economy annually. Consent to decommission the Magnox Dungeness Power Station A was granted in 2006²; Dungeness Power Station B had been due to decommission in 2018 but will now remain until 2028 as a result of £150m extra investment. The decommissioning of Power Station B will be another blow to the area's economy. It employs some 1,500 people, many of whom live on the Marsh, in Shepway, Ashford and Rother districts.

In recognition of the impact³ of the closure of the Magnox power station, government funding was made available to fund initiatives supporting the local economy, former employees and local communities. The Romney Marsh Partnership (RMP) was set up to make a case for prioritising the area to receive Nuclear Decommissioning Authority (NDA)/Magnox and other socio-economic funding, and to produce a

¹ Shepway's PPLP – Preferred Options

² <http://www.onr.org.uk/nuc26.pdf>

³ The government's Nuclear Decommissioning Authority commissioned an Economic Impact Assessment into the effects of the closure of the Magnox Power Station, and how to support and strengthen the local economy

programme of work (see also ‘Strategic Initiatives and Projects’ section for more details). In this way the RMP has an influencing role over the funding decisions of NDA/Magnox.

For the Romney Marsh area⁴, the diversification of the local economy towards tourism is suggested in the Romney Marsh Socio-Economic Plan, which draws comparison with other areas hosting nuclear power stations at coastal locations.

Rother’s economy is weak relative to the region as a whole⁵ and regeneration is a particular priority for the coastal areas of the district. Increasing overall prosperity is a key local objective of the Core Strategy, which recognises the relatively low economic productivity of the area. Accommodating growth whilst ensuring that this does not conflict with the unique protected wildlife and habitats in the designated areas is a challenge.

In the Rother part of the Strategy area tourism is a key economic driver, with the rich cultural offer of Rye, Rye Harbour, Camber Castle and Winchelsea, and the coastal resort area of Camber Sands. A long-term strategy for Camber has been developed and is now an adopted Supplementary Planning Document (SPD). The main employment site in the Rother part of the Strategy area is Rye Harbour Road Industrial Estate which is home to 47 different companies. The Port of Rye is also an important contributor to the local economy⁶. Both these sites are situated within close proximity to the designated sites. The tourism sector is seasonal with unemployment rates in winter months tending to rise. The Rye and Rye Harbour Study identifies the potential to enhance green tourism in the area to create employment opportunities throughout the year. This is supported in Rother’s Core Strategy.

⁴ Parts of Shepway, Rother and Ashford included within the Romney Marsh Partnership area

⁵ Rother Core Strategy

⁶ Rye and Rye Harbour Study

Local Policy, Plans and Strategies

Both Rother (RY1, CO3, EMP6) and Shepway (CSD3) contain policies/preferred options that seek to promote and encourage coastal watersports and 'green tourism' which in at least some cases will be explicitly centred on parts of Dungeness:

- Rother draft policy RY1 - '... Work with stakeholders and agencies to promote managed opportunities for the development of green tourism primarily centred around Rye Harbour Nature Reserve'
- Rother draft policy CO3 - '... giving particular support for water-based recreation along the coast near Camber Sands and Bexhill, and at Bewl Water'.
- Rother draft policy EMP6 - 'Tourism activities and facilities in Rother will be positively encouraged, and related development allowed, where they align with the following considerations, as appropriate ... it supports active use along the coast, consistent with environmental and amenity factors'
- Shepway draft policy CSD3 – 'Development in these locations may only be acceptable in principle if forming a site for ... tourism enterprises ... or strategic coastal recreation'.

Extract from Rother and Shepway Core Strategies Habitat Regulations Assessment (Dungeness SAC; Dungeness to Pett Level SPA and SPA extension; and Dungeness, Romney Marsh and Rye Bay proposed Ramsar site) Final report following Publication Stage consultation January 2012 by URS Scott Wilson

Shepway

Summary

- Shepway's PPLP discusses encouraging more visitors to the Romney Marsh area, including Lydd;
- Green Tourism may be a key theme for tourism and rural development;
- Shepway's DMP proposes the development of tourism 'products' which attract more visitors 'out of season';
- Shepway has plans for housing growth at New Romney and Lydd; with proposals that are in proximity to sensitive wildlife areas;

Visitor Economy in Core Strategy and Emerging Places and Policy Local Plan

Shepway's Core Strategy⁷ includes policies relating to tourism as well as a number of references that make clear the Council's aim to achieve increased tourism/visitor appeal. The Joint HRA (2011)⁸ identifies a

⁷ Shepway District Council Core Strategy 2013

⁸ Rother and Shepway Core Strategies Habitat Regulations Assessment (Dungeness SAC; Dungeness to Pett Level SPA and SPA extension; and Dungeness, Romney Marsh and Rye Bay proposed Ramsar site) Final report following Publication Stage consultation January 2012 by URS Scott Wilson

number of planning policies which could not be screened out. These include two policies relating to tourism:

- i. Shepway's policy on rural and tourism development⁹ about which the HRA states 'While most of its elements are relatively innocuous, the promotion/achievement of increased tourism (and day trippers) and 'strategic coastal recreation' could lead to significant effects on the Dungeness international sites, given that they are substantial attractions for visitors from a very wide area. While increased tourism is ultimately positive for the district the issue is screened in for further consideration'.
- ii. The HRA also identifies the New Romney Strategy¹⁰ and states 'This policy cannot be screened out. In particular, the promotion/achievement of increased tourism (and day trippers) could lead to significant effects on the Dungeness international sites, given that they are substantial attractions for visitors from a very wide area. While increased tourism is ultimately positive for the district the issue is screened in for further consideration'.

Shepway's Places and Policy Local Plan (PPLP)¹¹ discusses encouraging more visitors to the Romney Marsh area:

*'The Marsh's coast and beaches provide a well-established attraction to visitors and the area's unique environment offers opportunities, with suitable management arrangements, to increase visitor expenditure and to promote sustainable development to increase local employment. To this end connectivity (through transport accessibility, travel information and electronic media), town and village centres, visitor accommodation, and long-term maintenance of key visitor sites, will all need to improve, particularly to maximise benefits from growth elsewhere in Shepway. Investment in this key infrastructure **will help encourage more visits** and especially those focused on enjoyment of the natural environment, local produce, walking, cycling and the light railway.'*

The PPLP¹² discusses the focus on tourism in Romney Marsh; stating that 'These features [the special wildlife and landscape appeal of the Romney Marsh area] will form a central part of the appeal of Shepway to visitors'. It also mentions the 'growth of sectors such as tourism' as a key feature of Romney Marsh in the future. It goes on to state that 'Lydd and St Mary's Bay will have upgraded their appeal and local services to become highly popular to visitors...' and that 'Dymchurch will continue to be the primary coastal tourist resort for the Marsh...'. Finally, it states that 'The villages of the Marsh... will continue to be attractive rural communities, attracting new visitors' and suggests an expanded tourism base in New Romney.¹³

⁹ Policy CSD3: Rural and Tourism Development in Shepway

¹⁰ Policy CSD8: New Romney Strategy

¹¹ PPLP Preferred options draft October 2016 Page 85 paragraph 5.114

¹² PPLP page 30

¹³ Ibid page 86

The PPLP also discusses the rural and tourism development of Shepway, stating that ‘green tourism’ may be a key theme and that ‘*Planning for tourism in rural areas should therefore sympathetically utilise and enrich, rather than contribute to undermining, the character of the countryside and its intrinsic beauty and qualities*’.¹⁴

One of the Action Plan priorities in Shepway’s Economic Development Strategy is ‘Enhancing our towns and coast’ and within this priority one of the actions is to ‘*Consider how to maximise the economic benefits of the coast, including the potential for more chalets and beach huts, more sea sports and facilities to encourage the full enjoyment of the asset*’.

In its description of Romney Marsh, the strategy lists the internationally important natural and cultural heritage, and describes it as ‘*both an opportunity and a constraint*’.

Tourism Plans

Shepway DC has produced a Destination Management Plan (2016) (DMP). Although not a tourism strategy, and with no formal status, the DMP will act as an advisory tool and provide guidance for the development of tourism in the district; and as such it supports the development of the visitor economy and the implementation of Shepway’s related planning policies. One of the key objectives of the DMP is to increase visitor numbers to Shepway; and in particular to develop staying visitors and improve the value of visitor spend. The DMP also promotes the development of tourism ‘products’ which attract more visitors ‘out of season’.

The DMP states that the reason most people visit the Kent countryside is for the scenery; while the coast is the greatest attraction. A number of distinctive areas are recognised as destinations in their own right, each attracting different market sectors; one of which is Romney Marsh. The report also recognises the need to cross-boundary cooperation with neighbouring authorities and businesses.

It goes on to state that enjoying the landscape is particularly popular during the winter from November to April as well as in July and August¹⁵. The DMP mentions the sensitive sites, but only in terms of visitor pressures that need to be managed effectively. In this regard, the DMP does not go far enough. The natural areas are not regarded as a positive asset, and are not considered in anything other than environmental terms. Shepway’s planning documents support the development of green tourism, yet the DMP fails to explore this as a key area.

Development Plans

In its Settlement Hierarchy, the Core Strategy identifies New Romney Town (incorporating Littlestone) as a Strategic Town for Shepway, and as such, one that will accommodate ‘significant development’. In the same Document, Lydd Town is identified as a Service Centre for Shepway, and will accommodate ‘development appropriate to Shepway and their own needs’.

¹⁴ Ibid pages 70-71.

¹⁵ Shepway Tourism Destination Management Plan report; and Appx 2: Tourism Market Analysis June 2016

Dymchurch is identified as a Rural Centre, to develop in a manner ‘that supports their role as integrated tourist and local centres’. Greatstone is identified as a Primary Village, with ‘the potential to grow and serve residents’.

Further, Core Strategy Policy SS1 states: ‘The future spatial priority for new development in the Romney Marsh Area is on accommodating development at the towns of New Romney and Lydd, and at sustainable villages; improving communications; protecting and enhancing the coast and the many special habitats and landscapes, especially at Dungeness; and avoiding further co-joining of settlements and localities at the most acute risk to life and property from tidal flooding.’

The development of settlements in close proximity to the Natura 2000 areas may be an issue for further investigation regarding the provision of open space and increased recreational pressure. The areas surrounding both New Romney and Lydd provide few alternative opportunities for recreation in areas not designated for wildlife; in particular the nearest coastal areas are mostly designated. Information on the current levels of use of the designated sites by residents from these areas is not known; so, it is not possible to estimate the potential use by new residents. This information may be useful to obtain in developing plans for green infrastructure in the future.

Rother

Summary

- Rother has plans for housing growth at Camber Village and Rye Harbour; with proposals that are in proximity to sensitive wildlife areas;
- Rother plan to intensify and expand the Rye Harbour Industrial Estate (their biggest industrial site); whilst acknowledging the proximity to the Natura 2000 sites, and ask for ‘due consideration’; Rother also mention mitigation and compensatory provision;
- There is a policy to not allow holiday homes to develop into permanent residences (N.B. But not for nature conservation purposes);
- Policy EC6: Tourism Activities and Facilities – restricts occupancy but does not restrict operators from extending their season of activity;
- Policy RA2 General Strategy for the Countryside includes prioritising provision of local open spaces to reduce impact on the Natura 2000 sites;
- Rother supports the development of green tourism as a means of extending the tourism season and supporting jobs;

Visitor Economy in Rother Core Strategy

Rother’s Core Strategy¹⁶ is the key planning policy document within the Rother Local Plan. It sets the overall vision and objectives for development in the district up to 2028.

¹⁶ Rother Local Plan Core Strategy adopted in September 2014

Within the Rother Core Strategy, Policy EMP6: Tourism Activities and Facilities was one of seven policies which could not be immediately screened out as being unlikely to lead to significant effects.

Tourism plans

Rother's tourism plans are derived from their Local Plan documents. Their plans are also set out in the Economic Regeneration Strategy and 1066 Destination Management Plan. Unfortunately, both these documents are now out of date, and there is currently no tourism strategy.

Rother's most recent Economic Regeneration Strategy¹⁷ centres around prosperity and quality of life, and includes aims to develop greater economic prosperity, more leisure and cultural opportunities, and to value more highly their countryside and coastline assets for their contribution to quality of life.

The strategy outlines the tourism economy, which is clearly an important element of the local economy.

Key facts from the strategy include:

- Eastern Rother is among the most deprived areas in the district¹⁸.
- A key trend for the future is the increasing number of retired people in the district.
- Poor road and rail infrastructure, with long journey times.
- Poor public transport
- Coastal towns have limited catchment
- Rother also has a rich cultural offer, and significant heritage and natural assets

Development Plans

It is clear that tourism is an important component of the local economy. Plans and policies support the development of tourism and recreation. Rye Harbour and Camber are areas identified for development, including the tourism offer. However, Rother's planning documents do acknowledge and recognise the need to minimise impacts on the 'important habitats'.

Background documents to the Core Strategy include **The Rye and Rye Harbour Study**¹⁹.

The study supports the development of green tourism in the area in order to support employment throughout the year (and not just the summer months).

Policy RY1: Policy Framework for Rye and Rye Harbour supports the promotion of green tourism initiatives, 'including careful management of Rye Harbour Nature Reserve and, where feasible, new habitat creation and green infrastructure linkages, that protects and enhances the integrity of the internationally important ecological interests'.

¹⁷ Rother's Economic Regeneration Strategy 2010-2015

¹⁸ Index of Multiple Deprivation index 2007 from Rother's Economic Strategy

¹⁹ Rother District Council Local Development Framework – Rye and Rye Harbour Study August 2011

Rother Council's Corporate Plan²⁰

The broad outcomes of the Corporate Plan include 'Prosperity through sustainable tourism', within which there are specific actions to 'Progress the Masterplan for Camber as a premier South-East tourism destination' and 'Support events which will increase visitors'.

Another broad outcome is 'Conservation and Biodiversity' within which is the action 'Support nature conservation and biodiversity'.

A specific project in the plan is the 'Camber Visitor Initiative – redevelopment of key sites in Camber to improve facilities for visitors and residents, to attract higher-spending audience'.

Camber Village SPD

Camber has been the subject of a number of studies and reports. The Camber Visitor Management Initiative (2004) includes actions directed at extending Camber's tourism season, expanding its tourism offer, and improving both the visitor experience and quality of life for local residents.

The Camber Village Supplementary Planning Document (SPD) (2014) builds on this and other work to establish a vision and guidance for future development. The document recognises the popularity of the area for tourism, coupled with its sensitive natural environment. The SPD includes a number of objectives of direct relevance to, and in support of, this Strategy. These include:

- Promote more sustainable/sensitive transport options in the area
 - Improve cycle links – in particular between Rye and Camber – and introduce cycle parking and hire;
 - Explore the potential for a park and ride service to encourage modal shift for visitors and residents;
 - Improve signage and rights of way to encourage walking; and develop new walking routes to the north of the village;
- Relieve pressure on the Camber car parks by improving the car park and introducing parking charges at Broomhill (to cover the costs of improvements);
- Carefully develop the extreme sports offer in the locality and manage the impact of this, particularly on the natural environment;
- Protect and manage the sensitive dune landscape and ecology through:
 - Managing access to the dunes, including access from car parks;
 - Providing for the winter birds nesting season;
 - Consideration of careful planting to secure the dunes environment;
- Raise the profile of the local ecology as integral to a sustainable tourism offer – to encourage a shift to environmental tourism;
- Improve signage, interpretation and education for landscape environment;

²⁰ Rother District Council Draft Corporate Plan 2014-21

- Support existing and establish new green infrastructure alongside new development; and enhance the quality of existing public spaces;
- Support and enhance the bio-diversity and ecosystem of the area;
- Improve the public realm – including the creation of ‘gateways’ at each end of the village.

However, some of the recommendations, while intending to support the local economy, have the potential, without careful assessment, to increase recreational pressure on the sensitive sites:

- Identify means of extending the visitor season - including raising the profile of the village as a filming location;
- Encourage a broader mix of visitors to the village – proposals include a new ‘glamping’ site on the edge of the village, and new beach huts for both Camber central car park and Broomhill car park;
- Develop new walking routes to the north of the village – which may lead visitors into sensitive area of the marsh;
- The development of housing on the Camber Central Car Park and the former Putting Green sites. Although an overflow car park will be used, visitors may opt to park at the Camber West car park, which has the potential to add visitor pressure to the dunes.

Visitor Economy

Introduction

The strategy area offers stretches of developed and undeveloped coast, low-lying rural areas of marshland and shingle foreland, pretty villages and historic towns. The coast, much of which is publicly accessible, is well-visited by residents, day-trippers and holiday-makers. Visitors travel significant distances to enjoy the sandy beaches, built heritage and opportunities for water sports. The coastal destinations make their own distinct offer: Camber offers sun, sea and sand and is particularly popular with families, many of whom stay in the large holiday parks in the village; Dungeness Point has a national profile, and offers a unique shingle landscape which attracts thousands of visitors each year; and at Broomhill and Greatstone, the land form and the effect of the winds and tides provides some of the best areas for kite-surfing in the country, attracting participants from a wide area. The coast is the biggest attraction, but there are also historic towns and villages including Rye and Winchelsea. Inland, Romney Marsh has few visitor attractions, but its peaceful, flat and mostly agricultural landscape is ideal for walking and cycling.

This area has a lot to offer to visitors, and the local economy depends on the continuing success of its tourism offer. However, the area is home to some of the UK's rarest species, and is afforded legal protection at an international level.

The strategy area includes the administrative areas of Shepway District Council in Kent and Rother District Council in East Sussex. Although the tourism areas adjoin, each authority takes its own, separate approach to the development of their local economy and tourism.

Local and National Trends and Tourism Destinations

The UK is overwhelmingly viewed as a short-break destination. 29% of Brits are likely to take a short break in a rural location and 24% to the seaside. Experiencing the scenery and natural beauty is the most important motivation for short-breaks and main holidays. Enjoying the landscape is particularly popular during the winter from November to April, as well as in July and August.²¹

From city to coast to countryside, different types of destinations attract different visitors for different reasons.

²¹ A Tourism Destination Management Plan for Shepway - Folkestone, Hythe, Romney Marsh and North Downs - 2016 – 2020 Report for Shepway District Council December 2016

The English Seaside

In England in 2014 seaside trips accounted for 19% of all domestic overnight trips and 11% of all day visits²². 73% of overnight (staying) trips to the seaside were for holidays. **The south-east accounts for 17% of all seaside holidays (second only to the south-west at 23%).**

13% of all day trips to the seaside in England were made to participate in outdoor activities, while 21% were made for a general day out.

While the age profile of seaside visitors is similar to the overall population, seaside holidays are more likely to be taken by families, and are **more likely to be taken by those in the less affluent social grades C2DE. Camping and caravanning (including holiday parks)** are more important to seaside destinations than to other areas (44% of holidays to the seaside).

76% of seaside trips in England take place between **April and September.**

Aside from going to the beach, seaside trips are more likely than average to involve visitor attractions and outdoor activities.

Visitors to the seaside associate the seaside with **nostalgia** – for trips to the seaside when they were younger; also with **'getting away from it all'**. Visitors think of seaside towns as quaint, with links to local history and more things to do.

Many coastal 'seaside' resorts have suffered **economic decline** due to changes in tourism trends and fewer people taking their annual holiday at the seaside. In the period between 2008 and 2014, although there was a marked increase in 2009, the volume of seaside holidays in England has been declining, with no overall growth in the period. As a result, the Government – through the Coastal Communities Fund – has been supporting initiatives such as the National Coastal Tourism Academy²³ (NCTA) to support coastal communities to deliver economic growth.

The NCTA report on Coastal Tourism 2016 concluded that coastal tourism has significant growth potential. The report recommendations focus on the economic potential, with opportunities to grow the visitor economy identified²⁴ as:

- Focus on empty-nesters (over 55s) to increase off-peak visitors;
- Develop health and wellness products and business events;
- Raise awareness among under 35s and international visitors.

²² Visit England – Domestic Seaside Tourism 2014 report

²³ National Coastal Tourism Academy <https://coastaltourismacademy.co.uk/coastal-tourism>

²⁴ Coastal Tourism, 2016, NCTA

The report describes the dominance of SMEs in coastal businesses and how coordination and support are important. It also discusses the need for destination management, and lists the priorities for development for destinations to boost the coastal economy as improving the visitor experience and attracting new markets.

The focus of the NCTA initiative is on economic growth from tourism, with little or no mention of the need to manage visitors sustainably to protect wildlife or designated areas.

The English Countryside

In 2014 in England, **holidays accounted for 54% of trips taken to rural areas**, with almost one in four trips being longer stays of four or more nights, higher than the national average of 15%²⁵

Almost three quarters of overnight stays at countryside destinations take place in **spring and summer** (Apr-Sep).

Non-serviced accommodation is a popular choice for domestic trips to rural destinations, with 49% of visitors staying at camping/ caravanning sites or other self-catering accommodation (vs. 37% of all trips).

Outdoor activities including long walks are popular on rural holidays (39% of trips include this activity, compared to 27% of all trips), as are visits to parks and gardens (18% vs. 14%), but holidays to rural areas are less likely to include arts, cultural and entertainment activities (9% vs. 15%).

Countryside trips including overnight stays are more likely than other trips to be made by **higher social grades** (71% made by ABC1s vs. 66% of all trips).

Countryside day trips were more likely than average to involve outdoor activities (15% vs 7%).

Around 70-80% of tourism day trippers to the countryside come from within the region they are visiting.

A third of all tourism day trips to the countryside are to destinations in the South-East and South-West.

Although the number of rural trips taken fell back in 2014, volumes remained higher than in 2008, with the annual average growth rate on a par with the national average.

²⁵ Visit England – Domestic Rural Tourism 2014 report

The Growth of Active Leisure

The demand for outdoor recreation is driven by a range of factors. This strategy's visitor report²⁶ outlines the factors and lists the underlying themes driving its change and growth; including an ageing population, the rise of child-free households, changes in family structures, consumer trends, a rise in the experience economy, the drive to greater physical activity and health, a more networked society, increasing affluence and climate change amongst others. In the medium-term future, there will also be a rise in the number of younger people because of a 'spike' in birth rates in the mid-1990s.

According to Visit England²⁷, the desire to be active and healthy is driving an increase in active leisure trips. Rural tourism may see an increase because of increasingly urban lifestyles and the health and activity trend. Seaside tourism is viewed as less clear-cut; with some destinations faring better than others, but with an increase in the niche or unique offer of some seaside resorts. Tapping into unique experiences is also key, from cuisine to sports. Visits for 'experience' tourism – for activities such as kite surfing or other watersports and activities – are on the increase.

The Local and National Economic Value of Tourism

Day Visits

Figures published in the Great Britain Day Visits Survey (2014) indicate that there were 1.3 billion Tourism Day Visits undertaken in England during 2014 (**down 2% compared to 2013**). Despite a small drop in volume, spend per head was up, leading to an **increase in day trip expenditure of 2% at the national level**.

At the regional level, the volume of day trips **increased by 4% on 2013**. Day trip spend at regional level was also up, and at a level higher than the national average (**up by 7% in the South East** compared to up by 2% nationally).

Staying Visits

93 million domestic overnight trips were taken in England in 2014, **a decrease of 9% compared with 2013**. The value of domestic overnight trips **fell by 3%**, from £18.7 billion in 2013 to £18 billion in 2014.

Reflecting the national trend, the volume of domestic overnight trips fell by 9% in the South East in 2014 compared to 2013 (from 17.9 million to 16.2 million). According to the national survey results, domestic overnight trip spend in the South East saw a greater drop than seen at national level; **down by 8% compared to national level of 3%**.

²⁶ Dungeness Complex SARMS Supporting Document 4 - Visitor Assessment

²⁷ Visit England – Domestic Leisure Tourism Trends for the Next Decade 2013 <http://visitenglandtrends.com/wp-content/uploads/2013/12/Domestic-leisure-trends-for-the-next-decade.pdf>

In contrast, trips to England and the South East by visitors from overseas increased in 2014 compared to 2013.

In 2015 the region received fewer domestic visitors than in 2013²⁸. However, those who did visit spent more per night than in 2013. **The average spend per night was up from £53.2 per night in 2013 to £56.53 in 2015.**

In the same period, Kent experienced **a marginal increase overall in the volume of domestic tourism trips, but a decrease in overnight stays and no change in tourism expenditure.**

Kent experienced **growth in overseas tourism in this period, and a growth in tourism spend.** Research from Visit Britain tells us that in Rother in one year¹ the **combined figures for day visits and all overnight tourism combined was 2.858 million visits generating an estimated £127 million.**

In Shepway during the same period the **combined figures for day visits and all overnight tourism combined was 3.004 million visits generating an estimated £107 million.**

Table 1 provides a summary of the tourism figures outlined above.

The two local authorities and other tourism organisations use differing methods to gather and present their tourism data, and over different time periods, so it can be difficult to present and compare findings. However, the important role of tourism to the economies of Rother and Shepway is clear.

Coastal Tourism

In 2014, there were 17.64 million staying trips to the seaside in England (19% of total), with spend at £3.9 billion (21% of all spending on domestic overnight trips); and 144 million tourism day trips involving a trip to the seaside (11% of total) with associated spend of £5.3 billion (12% of all spending on day visits).

Rural Tourism

In 2014 there were over 17 million staying trips to the countryside in England (18% of total), with spend at £3.1 billion (17% of all spending on domestic overnight trips); and 340 million day trips (25% of total) with associated spend of £8.4 billion (19% of all spending on day visits).

²⁸ Economic Impact of Tourism - Shepway - 2015 Results - November 2016

Table 1: Summary of Volume and Value of Tourism 2013 - 2015

	Year	National	Regional	Shepway		Rother	
Day Trips	2013		219 million	3.98 million			
	2013 £						
	2014	1.3 Billion Down on previous yr by 2%	227 million Up on previous yr by 4%			5.82 million Up on previous yr by 0.9%	
	2014 £	£ Up on previous yr by 2%	£ Up on previous yr by 7%			£ Up on previous yr by 1.1%	
	2015		216 million	4.09 million Up on previous year by 3%	£65 million per yr averaged over 3 yrs		£71 million per yr averaged over 3 yrs
	2015 £		£ Down on previous two years by 7%	£ Up on previous yr by 0.7%			
Staying Trips	2013 no of nights		17.9 million	1.34 million			
	2013 £						
	2014 no of nights	93 million Down on previous yr by 9%	16.2 million Down on previous yr by 9%			1.97 million Up on previous yr by 1.4%	
	2014 £	£ Up on previous yr by 3%	£ Down on previous yr by 8%			£ Up on previous yr by 4.1%	
	2015 no of nights		Down on previous two years	1.39 million Up on previous yr by 4.3%	£42 million per yr averaged over 3 yrs		£56 million per yr averaged over 3 yrs
	2015 £		£ Up on previous two years	£ Up on previous yr by 8.2%			

Rother, East Sussex

Visitors to Rother contribute significantly to the local economy. Visitors come for the area's arts and culture, history and heritage, seaside (notably Camber Sands), literary connections, events, gardens and local crafts/produce²⁹.

The latest Economic Impact results³⁰ show an increase in business turnover supported by Tourism activity; **up by 2.3% in one year** from 2013 to £291.8 million, along with an increase in the number of jobs supported by tourism activity which totalled 6,838 actual jobs in 2014, **representing 19.5% of jobs in the district.**

Overall, an estimated 489,000 staying trips were spent in the District in 2014, **up 1.9% compared to 2013.** It is estimated that 431,000 were made by domestic visitors (88%) and 58,000 by overseas visitors (12%). **Compared to 2013, domestic overnight trips increased 0.9% whereas the level of inbound overnight trips increased by 9.4%, reflecting the trend seen regionally and nationally.**

Staying trips resulted in an estimated **1,971,000 total visitor nights spent in the District, an increase of 1.4% compared to 2013.**

Table 2: Volume and Value of Rother's Tourism (2014)

Staying visitors		Day visitors	
Number of trips	489,000	Number of visits	5,822,000
Nights	1,971,000		
Direct Spend	£99,200,000	Spend	£146,915,000

With an increase in trip volume, **overall trip expenditure increased from £95.1 million in 2013 to £99.2 million in 2014, up 4.1%.**

Approximately 5,822,000 tourism day trips were made to the District (lasting more than 3 hours and taken on an irregular basis) in 2014 generating an additional £146,915,000 in trip expenditure. Compared to 2013, **the volume of day trips increased by 0.9% and expenditure increased by 1.1%.**

Total expenditure by visitors (overnight and day) to Rother is estimated to have been in the region of £246.1 million in 2014, **up by 5.0% compared to 2013.**

²⁹ Rother Core Strategy

³⁰ Data collected for Rother District Council and reported by Tourism South East

Shepway, Kent

In Shepway, the overall value of tourism to the economy is increasing.

Research from Visit Britain tells us that between 2013 and 2015 **tourism day trips to Kent were up 3%. Expenditure decreased by 11%.** The volume of visitors to fee paying attractions in the South East was **up by 5% between 2013 and 2015.**

In Shepway Council's recently completed Destination Management Plan (2016) tourism is said to have generated £235.2 million for the District in 2013, supported 12% of its employment and more than 3,000 jobs. In two years, by 2015, the sector grew to £242.5 million in Shepway, supported **12.7% of all employment and 3,388 fte jobs.**

Shepway attracts a higher volume of overnight holidaymakers than any of the other Kent districts and, after Canterbury, the highest number of overnight stays for any purpose. In addition, leisure trips account for 62% of all overnight trips, **the highest in Kent.**

Holidaymakers visiting Shepway are spending **less per night (£51) than any other district in Kent except for Swale;** and this is **lower than the national average for England (£71) and for Kent (£64).**

More than two thirds (69%) of the domestic overnight staying visitors and more than half (52%) of overseas staying visitors come to Shepway on holiday.

Table 3: Volume and Value of Shepway's Tourism (2013)

Staying visitors		Day visitors	
Number of trips	440,000	Number of visits	3,980,000
Nights	1,341,000		
Direct Spend	£75,550,000	Spend	£122,067,000

The Economic value of tourism to Shepway³¹

- Day visitors make up 90% of trips to Shepway and generate 61% of visitor expenditure;
- Staying tourists from the UK make up 8.5% of trips and generate 29% of expenditure;
- Staying tourists from overseas make up 1.5% of trips and generate 9.4% of expenditure;
- Although day visitors generate the most trips to Shepway and the most visitor expenditure, **the highest value visitors per trip are the UK staying tourists;**
- To create the greatest value to the economy Shepway needs to focus on **attracting staying visitors from the UK and overseas;**
- Shepway needs to focus on **attracting short break tourists and increasing the amount each visitor spends.**

³¹ Appendix 2 to the Shepway Tourism Destination Management Plan - Tourism Market Analysis - June 2016

The Tourism Offer of the Strategy Area

Tourism has long played a key role in the economy of the strategy area. The area benefits from a diverse range of visitor attractors including the coast, heritage towns and villages, and the rural areas of Romney Marsh.

The strategy area also benefits from proximity to numerous other significant visitor destinations. These include coastal resorts such as Hastings and Folkestone and the heritage destinations in Rother's promoted '1066 Country'³².

The Rother part of the Strategy area lies to the extreme south-east of the borough and of East Sussex county. The area shares some of the rich heritage for which '1066 Country' is known, but differs in that it includes part of the rural Romney Marsh and the shingle areas of Rye Harbour Reserve.

Heritage

The area has a network of historic towns, Cinque Ports and villages which make a strong heritage offer. The town of Rye is an ancient port (of the Cinque Ports) whose attractive old buildings and picturesque setting draw thousands of visitors each year. The historic core of Rye is a nationally renowned visitor destination. The nearby ancient town of Winchelsea, though smaller than Rye, has a similarly long history and interesting heritage; and it too is attractive to visitors. There are many other heritage assets including the medieval churches, the Royal Military Canal and the Romney, Hythe and Dymchurch Railway.

The Coast

The beaches along the Kent and East Sussex coastal sections of the Strategy area make a varied offer to visitors; including watersports, commercial and leisure fishing, both on and offshore, and traditional resorts. The huge stretches of sandy beach at Camber with its popular but fragile dunes, and its holiday sites which attract very large numbers of visitors in the summer months to enjoy the beach; the neighbouring Broomhill Sands beach which is one of the best in the country for kite-surfing, and attracts day trip enthusiasts from London and beyond; the coast at Dungeness where the deep waters attract anglers to its beach all year round; Greatstone beach which attracts water sports and beach sports enthusiasts, and the shingle beach at Littlestone – popular in particular with local people and dog walkers.

The Romney Marsh

The flat hinterland of Romney Marsh is famous for sheep farming, which has helped to further shape the landscape. This open and remote landscape has also inspired writers and artists. Urban areas account for a

³² 1066 Country is the tourism promotion brand for the 1066 partnership of Rother, Hastings and parts of Wealden district

small proportion of this rural area. The transport links are sparse and this, coupled with the nature of the landscape, rural isolation and lack of employment, means that the area suffers from issues of social and economic deprivation³³. However, the area is quiet and unspoilt, and its natural environment is one of its greatest assets. It has a visitor offer based around its nature and bird reserves and unspoilt countryside which is ideal for walking and cycling. The area also offers renowned golf courses.

Romney Marsh offers a unique natural habitat and is seen as one of the most important environmental assets in the SE of England. Much of Romney Marsh provides a distinct 'Living Landscape' hosting productive farmland, unique habitats and areas of natural beauty. The Romney Marsh Partnership's (RMP) Socio-Economic Plan and their Delivery Plan³⁴ describe the diverse offer in Romney Marsh as including:

- Traditional seaside resorts at Dymchurch and Camber;
- A unique internationally significant shingle landscape at Dungeness and tranquil rural hinterland;
- 2 highly regarded golf courses at Littlestone and Lydd;
- Ideal conditions for watersports including kite and windsurfing at Greatstone and Littlestone;
- Romney Marsh's natural environment - one of its greatest assets, with a strong visitor offer based around its nature and bird reserves and unspoilt countryside with its walking and cycling opportunities, including the Royal Military Canal Footpath;
- A range of small/medium scale attractions – including numerous heritage assets such as the medieval churches, the Royal Military Canal and the Romney, Hythe and Dymchurch Railway;
- One of the UK's best sea angling locations – with beach casting at Dungeness and commercial fishing at Dungeness and Rye;
- The strength of its natural and built environment;
- And, importantly, the area benefits from proximity to numerous other significant visitor destinations. These include coastal resorts (including) historical landscapes such as 1066 Country.

In addition, Romney Marsh offers a strong network of locations:

- New Romney and Rye are the two major centres within the RMP area, both acting as hubs for commercial and educational activity. Other employment centres include Dungeness (nuclear power activities) and Rye Harbourside industrial estates, situated close to Rye Harbour Nature Reserve;
- Rye itself is a historic town, with a nationally renowned visitor offer. Romney Marsh also has a number of other historic assets including medieval churches and the Royal Military Canal;
- The coastal area provides a significant visitor offer including attractive beaches, a diverse range of recreational activities (including watersports, golf courses and fishing) and accommodation.

Some of the attractions have plans to expand their offer and capacity. For example, the RHDR has already upgraded and expanded its café. Although limited by the capacity of the track, it plans to increase its service with growth of up to 20%, and to improve its visitor offer, with dining trains offering a train ride plus a meal in the café, with later operating times on some days.

³³ Shepway District Council Places and Policies Local Plan, Preferred Options October 2016

³⁴ The Romney Marsh Partnership Delivery Plan 2014-2017

The main operators of holiday parks at Camber are making ongoing improvements to the visitor attractions at their sites. For example, Camber Sands Holiday Park is investing in its site and developing more visitor facilities this year, including new lodges, refurbished Boathouse Bar and Restaurant, new soft play area and a new children's outdoor experience area.

Dungeness

Dungeness is a unique area, and one which attracts thousands of visitors each year. It is a shingle landscape, dominated by the nuclear power station sites and their transmission lines that extend inland. This area attracts visitors who arrive at the privately-owned Dungeness estate by car or on the little steam train³⁵ to admire the view, climb the Old Lighthouse, visit the garden of film director and writer Derek Jarman, or to go fishing at the beach. The old wooden sheds dotted across the landscape are gradually being replaced by architecturally-designed homes which are becoming tourism attractions in their own right.

Dungeness is also the historic home of beach casting and offers commercial fishing and sea fishing trips. The RSPB Dungeness Reserve and Rye Harbour Reserve offer destinations for wildlife watchers. The RSPB Reserve is a haven for birds and bird-watchers. The Rye Harbour Nature Reserve is a much busier site and attracts thousands of visitors each year who come to see the wildlife but also to enjoy a walk along the River Rother to the beach.

³⁵ Romney Hythe and Dymchurch light Railway

Branding and Promotion

Local area branding

The way the strategy area is presented and promoted to visitors is of the utmost importance in terms of visitor management, as this could have a direct impact on the type and volume of visitors to the sites. The strategy area lies within two districts and across two counties and is included within the brands of the local authorities as well as those of other organisations.

Shepway provide the direction for tourism in their Shepway Economic Development Strategy 2015-2020. Their Destination Management Plan (DMP) provides guidance for the development of tourism in the district. The challenges identified in the DMP include a confused marketing message, an uncoordinated approach to marketing and promotion, a lack of joined up delivery, an unclear product offer and a paucity of visitor information.

Rother's branding is largely guided by their '1066 Country' branding and promotion.

The strategy area makes a very diverse offer to visitors and is promoted as a series of distinct 'areas' by the two district authorities and the key tourism organisations: Romney Marsh and Coastal Kent are two of Shepway's promoted 'character areas' (or 'destinations' in the recently completed Destination Management Plan), and the Rother part of the area is promoted as (part of) Rother's '1066 Country'³⁶ (which includes Rother, Hastings and parts of Wealden district). Within these areas there are places which have a strong profile and are promoted as destinations e.g. Rye town, Dungeness and Camber.

In '1066 Country', research into awareness levels and perceptions of destinations shows that respondents have high levels of awareness of Coastal Kent and Coastal East Sussex, and both areas are considered most suitable for a day trip.

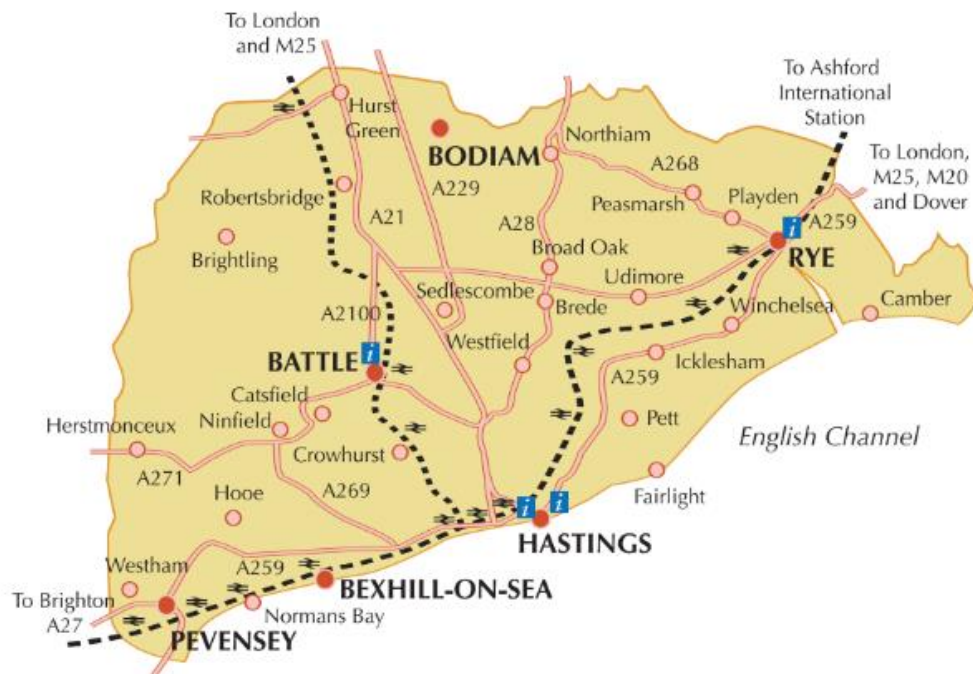
The research found that 1066 Country is closely associated with history, castles and attractive countryside; and not at all with extreme sport.

When considering the appeal of themes, **the lowest appeal of all the given themes was for cycling and walking**. Family, education and non-specialist activities are the main driver for both day trips and short breaks to 1066 country.

³⁶ The 1066 Country tourism initiative is a partnership of visitor attractions, accommodation providers and local authorities which works to promote the Rother and Hastings area under the 1066 Country brand. It is supported by Hastings Borough Council, Rother District Council, Wealden District Council, Tourism South East, National Trust and English Heritage and private businesses

Rother promotes '1066 Country'; a broad area of coast and countryside between Pevensey and Camber, including Rother, Hastings Borough and parts of Wealden District. It is largely defined by the locations of key castles and battlefields and linked together with the overall heritage 'brand' of the Battle of Hastings. This is a strong brand; and although the coast and countryside of the Strategy area are promoted within the brand, the emphasis is very much of the history and heritage of the area. Although Rye and Winchelsea fit comfortably within this heritage brand, it is difficult to see how the natural environment of Rye Harbour and the seaside resort of Camber fit the same brand. Currently Rye is promoted both as part of 1066 Country and also as a destination in the Romney Marsh. Figure 1 shows a map of the extent of 1066 Country.

Figure 1: 1066 Country (from 1066 Country Destination Management Strategy 2006)



For tourism purposes, Shepway promotes its district in distinct areas: Folkestone, Hythe and the Romney Marsh. Shepway's Destination Management Plan proposes the addition of the North Downs to these 'character' areas and tourism destinations. Of these character areas Romney Marsh (including Dungeness) comprises the study area within Shepway district.

'Dungeness, a strange land of extremes, one of the most valuable and yet vulnerable nature conservation sites in Great Britain' (Firth, 1984)

Dungeness is promoted both as a part of the Romney Marsh and as a distinct destination in its own right. It is often referred to in promotional materials as 'Britain's only desert'. There is scope for some confusion in the promotion of Dungeness, as it can refer to Dungeness Point/Estate, the RSPB Reserve, and/or the wider Dungeness National Nature Reserve. Dungeness Point has a national profile (see also the 'websites' section of this report) and is often showcased in national publications as a tourism destination.

The Visit Kent³⁷ website includes the promotion of Dungeness NNR, and describes Dungeness as:

'... unique – no boundaries, a desolate landscape with wooden houses, power stations, lighthouses and expansive gravel pits. Yet it possesses a rich and diverse wildlife within the National Nature Reserve in one of the largest shingle landscapes in the world.'

The same website promotes Dungeness on its 'Cultural Itineraries' and 'Themed Breaks and Itineraries' pages:

'...get away from it all scrunching along the shingle bank of Dungeness, which has been slowly moulded by the sea. It's the largest shingle beach in Europe and a third of all known plant species grow among the pebbles (have a look!).'

The above quote is a good illustration of the gap between the need for careful management of this sensitive area and its tourism promotion.

Romney Marsh means different geographic areas to different people, and depending on the context in which 'Romney Marsh' is used. The name, Romney Marsh, and tag line, The Fifth Continent, are already widely used, but the area referred to can be vague. The Romney Marsh website (<http://theromneymarsh.net>) promotes everything 'Romney Marsh' and is a great ambassador for the area; and this website uses the Fifth Continent tag line.

The Romney Marsh Partnership, in association with the Fifth Continent Project (FCP), has recently developed a brand 'toolkit'³⁸ for the Romney Marsh tourism industry. An example of one of the proposed ideas for a brand logo is shown at Figure 2.

³⁷ <http://www.visitkent.co.uk/attractions/dungeness-national-nature-reserve/176293>

³⁸ From Romney Marsh Brand Guidelines v.1 September 2106 by PROGRESS and ALEXANDRPATRICK for the RMP

Figure 2: A proposal for a log for Romney Marsh (from Romney Marsh Brand Guidelines)



Attractions and areas within the strategy area are promoted as iconic destinations (e.g. Dungeness), for the experiences they offer (e.g. kite-surfing at Broomhill, sun-bathing and swimming at Camber) or for the ease or speed of travelling there for a day out or a short break.

Although not a separate brand, Camber Sands has a national profile as one of England's best beaches.

Environmental Sector branding

The environmental sector brands and promotes the strategy area through a series of programmes, initiatives and site designations. For example, through the Romney Marsh Countryside Project which has a key role in the management of the Dungeness Estate and other areas on the Marsh.

The RSPB Dungeness Reserve is promoted by the RSPB nationally as one of its reserves; and it is well-known by bird-watchers locally and from further away, as an important bird-watching site. Dungeness is one of the RSPB's main visitor reserves and they have said they will continue to invest in the reserve as it currently stands to maintain the visitor experience. The RSPB is currently undertaking a project to determine where and when to invest in their reserves. This is a national project and will take some time to complete. Until this is completed it is difficult to say how much investment Dungeness will receive, and what the target audience will be.

It is understood that the RSPB and the NNR Partnership are considering branding the Dungeness NNR to more clearly identify the area designated as the Dungeness National Nature Reserve.

Romney Marsh is referred to as The Fifth Continent. This originates from Thomas Ingoldsby's³⁹ 'The Ingoldsby Legends' where he wrote:

'The World, according to the best geographers, is divided into Europe, Asia, Africa, America, and Romney Marsh'

³⁹ The pen name of 19th century author and cleric Richard Harris Barham (sometime Rector of St Dunstan, Snargate).

This has been used more recently as the title of a major lottery-funded environmental initiative 'The Fifth Continent Project' (FCP). This project is being led by the Kent Wildlife Trust, and is promoted on several websites. The Fifth Continent could be a strong brand for the Romney Marsh area, with the potential to be a brand 'vehicle' for the Strategy area in the future (see also Romney Marsh branding on page 44).

Rye Harbour Reserve is promoted as part of Rother's 1066 Country, but also in its own right as a (Sussex Wildlife Trust) nature reserve and a place for walking and enjoying the coast.

There are currently no controls or guidelines over how an area is promoted by third parties. Figure 4 shows pages from a recent copy of the local Kentish Express newspaper, with a profile on dog-friendly beaches in Kent. This is an example of how promotion can encourage activities which may be damaging to the sensitive wildlife at the designated sites.

There are clearly a number of distinct brands and methods of promotion employed across the study area, some of which focus on the area's tourism attractions, while others attempt to convey the area's appeal for its natural or built environment. Some areas receive national attention (Dungeness and Camber for example) while other areas are included in overall branding approaches e.g. 1066 Country (includes Pett Level and Rye Harbour). This is confusing for visitors; and it doesn't help the overall area or the sites in positioning themselves as a destination, or to convey a message regarding the need for more appropriate, sustainable tourism that will support the natural environment.

Figure 3: Pages from the What's On section of the Kentish Express



The Romney Marsh Socio-Economic Plan outlines the key attractions of the area, and describes their marketing as ‘ad hoc or not at all’, and suggests the potential for **a single visitor brand**, and how it could generate more value to the local economy (see also page 44).

Overall the promotion of the strategy area is uncoordinated. This is not surprising in some ways, as the area is not currently marketed or branded as a whole. The RMP and the Fifth Continent Project is in the process of developing branding for its project area. Although parts of the Strategy area lie outside the operational area of the Fifth Continent Project, it is understood that some extension to of the area may be possible to include Rye Harbour Reserve and the Pett Level area, thereby including the entire Strategy area. The Fifth Continent Project provides a timely opportunity to re-brand the Strategy area.

Sources of Information for Visitors

On-site information is dealt with in the Visitors report. However, worthy of note here, Shepway’s DMP identifies a paucity of visitor information and poor directional signage as key challenges to be addressed.

There is information available on-line, and on-site at the Romney Marsh Visitor Centre, at the RHDR station in New Romney and in Rye, together with some promotional materials available at the RSPB Reserve, Rye Harbour Reserve and at some private establishments e.g. local cafes and hotels, but locally-available visitor information is patchy, limited and un-coordinated. This is borne out by the results of the Phase One Visitor Survey, and by a subsequent assessment of signage, interpretation and visitor information as part of the development of this Strategy.

Also, some private organisations arrange promotion of the area e.g. Rye Bay Marketing Ltd, which produces a brochure ‘Discover Rye Bay – Inside and Out’. It is understood that the Fifth Continent Programme is currently working to address some of these issues for the Romney Marsh.

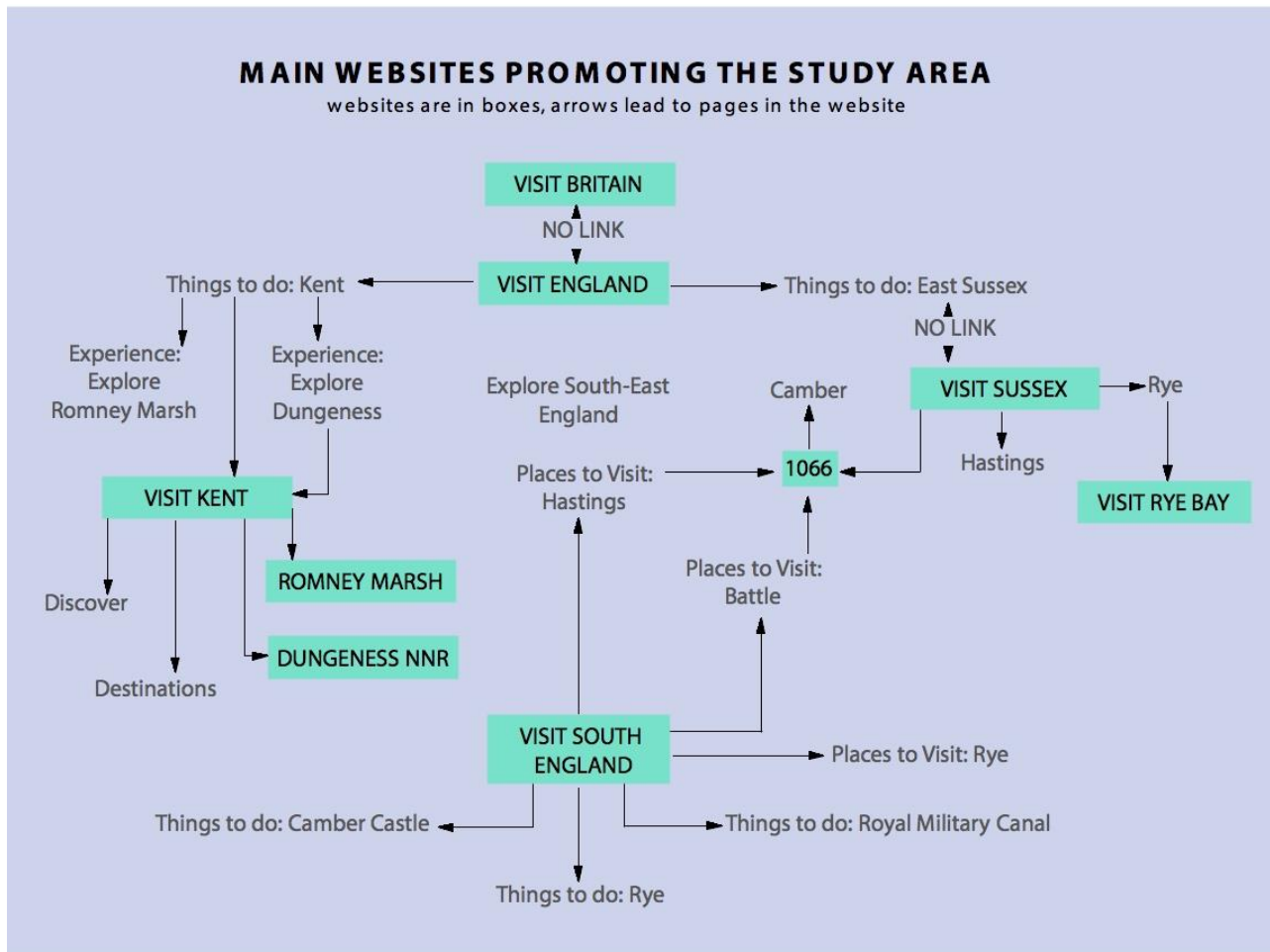
Websites promoting the Strategy Area

In terms of official tourism promotion websites, the area and its attractions are promoted in national, regional and local websites. There is no one overall website that caters for visitors and tourists to the area, little evidence of websites working together, and the current web presence is confusing. This view is borne out both by research into the websites covering the area as part of this study and for Shepway in their DMP.

Many websites promote the key attractions; and websites are often the main source of information available to visitors to the area. Although a huge amount of information is available on the internet it is quite confusing to navigate. Also, websites can be set up and managed by anyone with an interest; and as a result, they are of greatly varying quality.

Figure 5 provides a ‘snap shot’ of where the area and its attractions can be found on main (official) websites and their linkages.

Figure 4: Main Websites Promoting the Strategy Area



Both Dungeness Point and Camber Sands are often promoted nationally or regionally, e.g. Camber is promoted in London-based websites and in the press as an easy-to-reach day out from London. E.g. the website from 'Get West London' highlights Camber Sands and Rye beach in their top 18 beaches within easy reach of West London: <http://www.getwestlondon.co.uk/whats-on/whats-on-news/18-beaches-within-easy-reach-9878661>

At a national level, Dungeness is showcased on the Visit Britain website on its Coast page alongside a handful of other iconic coastal destinations, as well as in the 'Experiences' category. It is also featured on the Visit England and Visit Kent websites.

Shepway District Council's website does not list 'Tourism'; and information on attractions and 'things to do' are difficult to find. It promotes the Royal Military Canal, and 'walking, cycling and horse-riding' under its 'Parks and Open Spaces' section.

For Shepway, the Visit Kent website promotes the three sub-areas of the district (Folkestone, Hythe and Romney Marsh). There is a page on Romney Marsh (<http://www.visitkent.co.uk/destinations/folkestone-hythe-and-romney-marsh/1131>) with links to other Romney-related websites; and a helpful link to <http://theromneymarsh.net/> - a very useful promotional website that helps signpost the area for visitors.

In particular, the Romney Marsh website profiles Dungeness, the Beaches of Dungeness, Dymchurch, Greatstone and St Mary's Bay and the Romney Hythe and Dymchurch Railway (RHDR).

Rother District Council's website has a countryside page that promotes Dungeness, Romney Marsh and Rye Bay SSSI and its sites in Rother district (Pett Level, Rye Harbour, Camber Dunes, Romney Marshes). It encourages exploration by viewing from roads and footpaths and by visiting the paths and bird hides at Rye Harbour. It also promotes long distance footpaths - the Saxon Shore Way and 1066 Walk - and links to the '1066 Country' website that also promotes walks and Rye Harbour; and it links to the new Rye Harbour website <https://sussexwildlifetrust.org.uk/visit/rye-harbour>

'1066 Country' <http://www.visit1066country.com/> is the official website for the Rother part of the Strategy area. This is a useful one-stop information centre where visitors can find out about attractions, activities, beach and coast, and opportunities for walking and cycling. The site is strongly heritage-based; with no mention of sustainable tourism and little advice or direction on the need to respect the wildlife of the designated sites. The links to the 'Bird Watching' and 'Fishing' pages do not currently lead anywhere. Also, the website does not provide links to other websites of interest. The website includes Camber Sands, promoting it as a visitor destination for beach fun. The website has an 'Explore' section which showcases Camber/Broomhill as a destination for extreme sports. The 'Explore' section describes Camber as a unique but fragile environment, and asks visitors to 'take care' with barbeques (although it doesn't explain why, or the need to keep off the dunes).

Camber is a key attraction for Rother. The text of the website includes:

'Your kids will love the freedom to explore the sand dunes...' and Camber Sands as a '... sandy paradise for holidaymakers.'

Other websites of interest include:

- This link <https://www.thebeachguide.co.uk/south-east-england/east-sussex/camber.htm> is to The Beach Guide website, profiling Camber Sands as a destination within two hours of London.
- This link <https://www.thebeachguide.co.uk/best-beaches/> is to the Best Beaches page of The Beach Guide, where Dungeness features out of only 3 profiled in the south-east. The web page also says the beach is dog friendly.

Tourism Attractions and Facilities

A number of comments were made by the respondents to the Phase One Visitor Survey⁴⁰ referring to particular qualities of the survey sites; for example, citing Broomhill Sands as one of the best kite-surfing venues in the country; and similar comments about the special and unique landscape of Dungeness Point. However, ensuring the quality of each of the sites for their particular activities will be key to their success.

The differing 'unique selling points' of the sites can be advantageous in economic terms, as sites become known by a wider audience for their particular 'offer', and more people are attracted to participate in particular activities; and to spend money in the area.

What and where are the key attractions?

Across the Strategy area, the visitor attractions are largely concentrated around the coastline, and in the towns and heritage villages. Very few attractions are located in the rural hinterland of the Marsh. Some of these attractions operate within or close to the Natura 2000 areas.

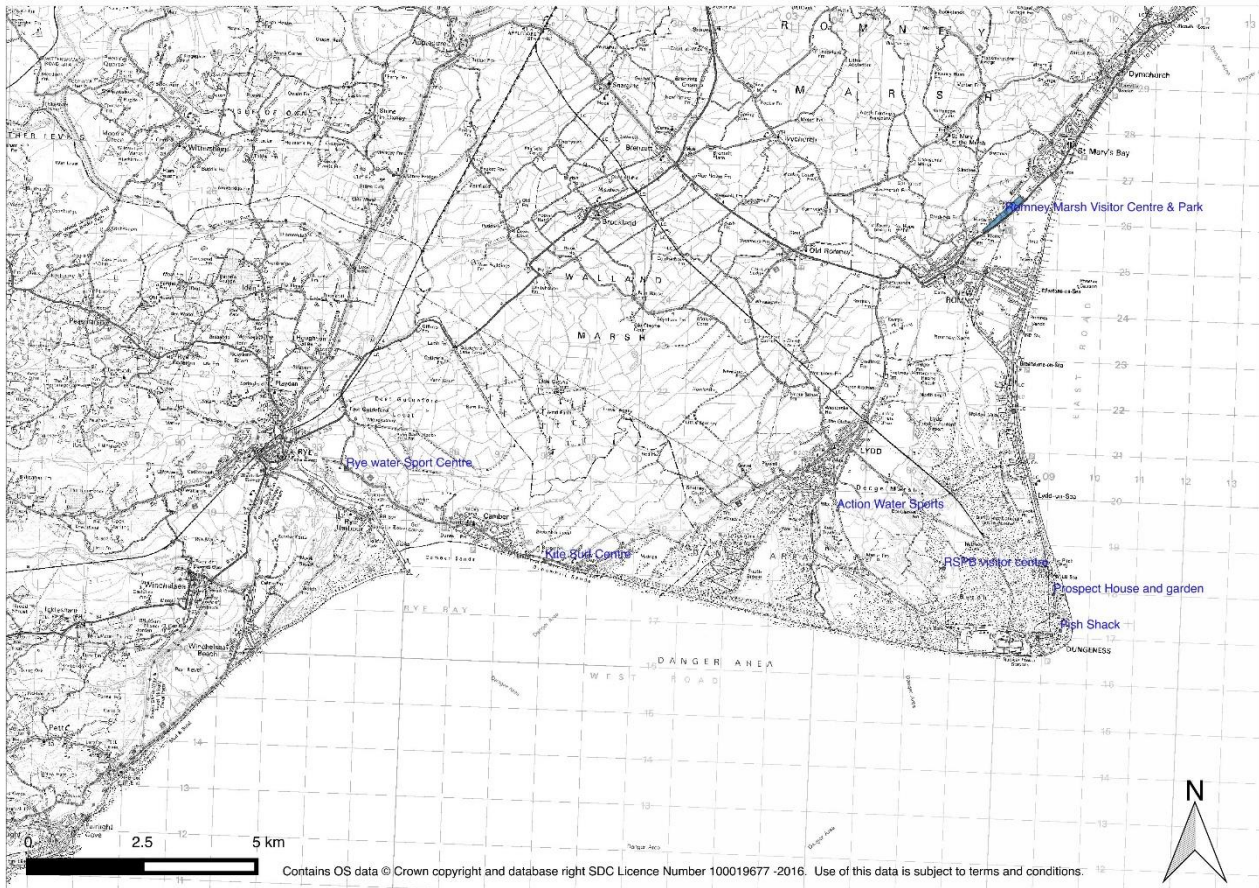
Table 4: Visitor Attractions

Attraction	Strategy Sub-Area & proximity to N2K sites
<p>Romney, Hythe & Dymchurch Railway - renowned miniature tourist steam train operating across the marsh with an exhibition at New Romney Station Stations at Hythe, Dymchurch, St Mary's Bay, New Romney, Romney Sands and Dungeness Opening times: Daily service mid-March – October Weekends in winter Capacity = 1500 passengers per day at peak times Operated by: The RHDR Association (a public limited company)</p>	
<p>Royal Military Canal path historic fortification walks/nature/bird watching A 28 mile promoted recreational path running from Seabrook near Hythe via Rye to Cliff End near Winchelsea with sections of shared-use route permitting cycling and horse-riding</p>	
<p>Romney March historic churches (3 organisations run tours)</p>	
<p>Rye History Walks (operate from March - September)</p>	
<p>Rye Castle Museum /Ypres Tower popular independent museum - limited opening</p>	
<p>Camber Castle English Heritage site in Rye Harbour Nature Reserve – limited opening</p>	
<p>Rye Harbour Reserve nature/bird watching/walking Managed by The Sussex Wildlife Trust</p>	
<p>Rye Golf Club private golf club Run by Rye Golf Club Ltd</p>	

⁴⁰ Rye Harbour, Camber, Dungeness and Shepway Visitor Surveys 2014 - 2015 by S Bayne and V Hyland - March 2015

Rye Watersports , Northpoint Water, New Lydd Road, Camber. Lessons in Kite-surfing (lessons located at Camber Sands and Greatstone), dinghy sailing, wind-surfing and stand-up paddle-boarding (lessons on the lake at Rye Watersports).	
Kite Surfing Broomhill Sands/Greatstone – reputed to be the best sites in the South East. The Kite Surf Centre at Broomhill offers lessons and equipment	
Camber – Pontins Holiday Park Open all year - Apartments and Bungalow – Wide range of visitor facilities Day passes available for non-residents	
Camber – Parkdean Holiday Park Open all year – caravans, camping, touring (caravans and motorhomes) and owned caravans and lodges with a 12-month owner season. Wide range of visitor facilities	
Dungeness B Power Station Visitor Centre Public visits Mon-Friday and groups by arrangement. Open Monday to Friday, from 9am to 4pm. No pre-booking is required to look around the visitor centre. There is no charge for entry into the visitor centre. There is also no charge for the guided tours Operated by EDF	
Dungeness Old Lighthouse limited opening times	
Dungeness RSPB Reserve nature/bird watching Owned and managed by the RSPB - Open daily except Dec 25 and 26	
Prospect Cottage, Dungeness Derek Jarman’s cottage and garden	
Fishing trips from Dungeness Various operators	
Action Watersports range of watersports - jet skiing, water-skiing, wakeboarding, flyboarding - on a lake at Herons Park, Dengemarsh Road Opening times are flexible and 7 days a week in High Season Operated by Action Watersports Ltd	
Lydd Karting Circuit Herons Park, Dengemarsh Road A 1040 metre circuit Open all year and by appointment	
Lydd Town Museum limited opening times	
Lydd Golf Club	
Land yachting on Greatstone Beach (reputed to be one of best beaches in the country) Operating times- Year round depending on wind and tides. Operated by – Fishy’s Land Yachts who operate on Tuesdays, Fridays and weekends and Kent Land Yacht club	
Littlestone Golf Club 2 courses – Championship Links Course and Warren Course	
Romney Marsh Visitor Centre north of New Romney Operated by the Kent Wildlife Trust open daily May – October Wed – Sun in winter months	
Varne Watersports Club Greatstone - range of watersports on Sundays and Wednesdays from April – September. Also fishing and land yachting	

Plan 2: Location of tourism attractions



Visitor Facilities

A recommendation from the Phase One Visitor Survey was to develop a better understanding of the needs of site users and to review the supporting facilities at the sites. Understanding the needs of visitors - including those staying at sites for longer periods – can help inform the future development of sites, and help support a business case for investment in facilities.

The survey identified the facilities currently offered at the eight survey sites, and the views of respondents.

Table 5 lists the supporting facilities currently available and indicates the requirements of the different users from the on-site and on-line survey responses.

At present, all eight sites offer car parking, with three sites making parking charges;
 Five sites offer toilets on site, and one site (Rye Harbour) has toilets very close to the main car park;
 Three of the sites offer cafes, and two sites have facilities nearby;
 One site (Broomhill) has no seating (on and around the beach and car park);

The main responses from the survey include requests for bins, dog waste bins, café/refreshments, toilets (particularly facilities for the disabled) and seating.

The responses at each site accord with the main user types at the sites. Of particular interest, the kite-surfers at Broomhill requested on-site toilets, showers, a snack bar or café and seating.

In terms of the effects on the local economy, the information on existing facilities and the potential demand may help to inform an economic case for investment at the sites, to build on the current visitor offer and to help inform potential investors/entrepreneurs.

Around half of all visitors in the on-site survey spent money during their visit, but there may be further opportunities to develop facilities that meet demand and user expectations, as well as enhancing the level of visitor spend.

Table 5: Facilities currently provided at the survey sites, and those requested by visitors

Survey Site		Toilets	Showers	Seating	Café/ Refreshments	Shop	Litter Bins	Dog Bins	Car Parking
Jolly Fisherman Car Park Greatstone	Existing Facilities	Disabled	N	Y	Jolly Fisherman pub	Shops in Dunes Road	Y	Y	Charges 130 spaces
	Additional Facilities requested		Y	More seats			More litter bins	More dog bins	More car parking for kite surfers
Lade Beach Car Park	Existing Facilities	Disabled	N	Y	N	Opposite on Taylors Road	Y	?	Free 50 spaces
	Additional Facilities requested			More seats			More litter bins	More dog bins	
Dungeness RSPB	Existing Facilities	Disabled	N	Y	Coffee machine	N	Y	?	2 car parks
	Additional Facilities requested				Café		More litter bins	More dog bins	
Dungeness Point	Existing Facilities	Y	N	Y	Railway café wknds only in winter; Snack (fish) shack wknds only; 2 x pubs	N	Y	?	Y
	Additional Facilities requested			More seats			More litter bins	More dog bins	
Broomhill Sands	Existing Facilities	N	N	N	N	N	?	?	Y
	Additional Facilities requested	Urgent need	Y	More seats	Snack bar		More litter bins	More dog bins	Car parking improvements now completed
Camber Central	Existing Facilities	Disabled	N	Y	1 café on site 1 café nearby	In Camber village	Y	Y	Charges 300 spaces
	Additional Facilities requested			More seats			More litter bins	More dog bins	
Camber West	Existing Facilities	Y	N	Y	Seasonal opening	In Camber village	Y	Y	Charges 1800 spaces
	Additional Facilities requested			More seats			More litter bins	More dog bins	
Rye Harbour	Existing facilities	Not on site but nearby	N	Y	N	Shop on Harbour Road	Y	Y	Free 180 spaces
	Additional Facilities requested			More seats	Tea/coffee machine		More litter bins	More dog bins	

Visitor Accommodation

Different market sectors are looking for diverse types of accommodation. Most hotels and guest houses in the strategy area are located in the towns, with localised presence elsewhere; whilst camping and caravan sites, mobile home and static caravan parks are usually in the more rural areas or along the coast.

Families in particular are looking for cheaper alternatives to hotels - such as self-catering, caravans and holiday camps⁴¹ - particularly where these sites give easy access to a sandy beach. It is these sites that are of interest with respect to their potential effect on the recreational pressure on the sites, as they may be either within or situated close to the designated areas. Some holiday parks are open for most or all the year, and some have become residential. As such these sites have the potential to increase recreational pressure on the designated sites.

Camping and Caravanning

This is a sector that is growing in popularity. According to one source⁴² a total of over 17 million camping and caravanning trips are estimated to have been taken by UK adults in 2016, over 15 million of which were in Great Britain, and include a spectrum of accommodation options from yurts and shepherd's huts, tiny caravans to motorhomes and holiday lodges. The total trips taken figure is expected to rise to 17.9 million in 2017 and to over 21 million in 2020, with Great Britain's camping and caravanning market worth over GBP3.2 billion by 2020.

Of those camping in a tent in the last three years, 'getting away from it all' is one of the key attractions (42%) as well as 'connecting with nature' (41%).

Among those interested in such leisure holidays, 16% plan to buy a tent from 2016 onwards, 9% a towed caravan, 12% a motorhome or campervan, and 10% a static caravan or mobile home.

The NCC (National Caravan Council) estimates in the UK at present there are approximately 550,000 touring caravans, more than 205,000 motorhomes and 330,000 static caravan holiday homes in use, totalling over one million leisure vehicles.

UK registrations of new motorhomes rose by 10.6% in the 2015 season (September 2014 - June 2015), with motor caravans rising 22.3%⁴³

The National Caravan Council confirmed that 18,611 holiday home (units) were despatched to holiday parks during 2015. An increase of 15.9%, following on from a 10.3% increase in 2014⁴⁴

⁴¹ Shepway's Destination Management Plan 2016

⁴² <https://www.dad.info/article/nearly-four-out-of-ten-adults-go-camping-or-caravanning-as-market-continues-to-grow>

⁴³ source: European Caravan Federation <https://www.pitchup.com/about/media/>

⁴⁴ <http://www.glassbusiness.co.uk/news-and-insights/editorial-caravan-market-trends-april-2016/>

In 2015, UK residents took 1.3m holiday trips camping and caravanning, spending £2.2bn during their trips (source: GBTS). Of the 13.5m trips, 46% were spent in static caravans, 28% in touring caravans or motorhomes and 26% camping.

By contrast, they made 11.4m holiday trips to Spain, 6.2m to France, 2.5m to Italy and 2.1m to Portugal (source: IPS)

In 2015, some 58m holiday bed nights were spent in caravans, tents and motorhomes by GB residents. The accommodation category receives more 24% more nights than hotel/motel, 38% more than rented self-catering and 398% more than guest house/bed and breakfast (Source: GBTS)

In 2015, average trip length was 4.3 nights and average spend per trip £165 per person for domestic camping and caravanning breaks (source: GBTS)

At least 17% of holiday parks and campsites are open all the year round (source: Pitchup.com)

The Camber SPD⁴⁵ quotes from Rother DC's (then) Emerging Core Strategy policies in relation to Camber, including policy to retain existing holiday parks and caravan and camping sites for tourism use (rather than residential) to retain capacity for tourists (there is no mention of any other reason). This could be helpful in restricting times of operation to usual holiday periods and not extending their use into the winter months when over-wintering birds are present on the beaches.

Table 6 provides a list of camping and caravan sites and motorhome parks in the area, and the times of year when they are operating. Map X shows the location of these facilities. From these data, it is clear that a number of camping and caravan sites and holiday parks are located within or close to the boundary of the Natura 2000 areas.

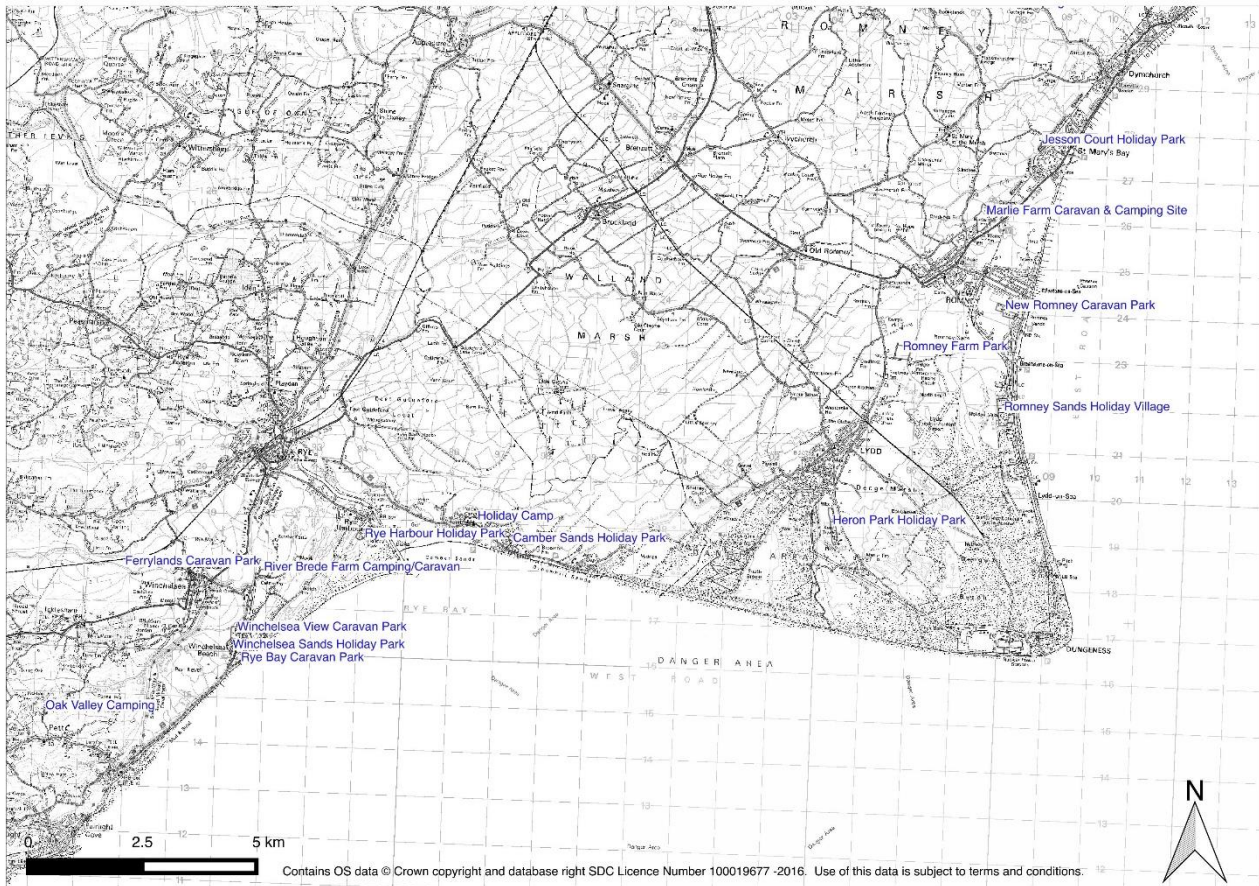
⁴⁵ Camber Village Supplementary Planning Document – September 2014

Table 6: Camping and Caravan sites, and Holiday Parks

Name	Type of Accommodation	No of pitches	Other facilities	Opening times	Dogs Y/N	Strategy Sub-Area & proximity to N2K sites	Other information
Herons Park, Lydd	Caravan & camping park	Ownership & Rentals 56 statics 31 plots	Fishing lake Nature walks	All year	Y on leads	Dungeness Point; In the SPA	30 owner-occupied static caravans, offered with 12 month occupancy and Royal Mail address. 3 more plots coming available (to total four in total situated around a fishing lake)
New Romney Caravan Park	Mobile home, caravan & camping park	Ownership & Rentals 10 touring sites 5 tents	Shepherd hut, yurts & Vintage caravans	Feb-Nov	Y on leads	Romney and Lade	
Romney Farm Park	Caravan & camping	50 pitches 20 electric hook-ups	Free wifi bbq	Easter - October	Y on leads	Romney and Lade	
Running Waters	Lodges, Caravan & camping	Fewer than 25 pitches		March - January	N	Romney and Lade	New shower toilet block 2016
Romney Sands Holiday Village	Caravans & Mobile Homes	Ownership & Rentals	Large site Many facs	March - October	Y on leads	Romney and Lade/ Dungeness Point	Fishing lake Indoor pool
Jesson Court Holiday Park	Caravans & Mobile homes	Ownership & Rentals 30 pitches	Uses Marlie Park facs	March - January	Y on leads	Just north of Romney and Lade (just over the Strategy area boundary)	
Marlie Farm Holiday Park	Caravans & Mobile Homes	Ownership & Rentals Touring pitches 16	Large site Many facs	March - November	Y on leads	Romney and Lade	New investment 2016
Camber Sands Holiday Park	Caravans & Mobile homes	Ownership Rentals	Large site Many facs	All year	Y on leads	Camber and Broomhill	£1.8 million investment 2017

Name	Type of Accommodation	No of pitches	Other facilities	Opening times	Dogs Y/N	Strategy Sub-Area & proximity to N2K sites	Other information
		Touring pitches					
Pontins Camber	Apartments Bungalow	Rentals	Large site Many facs	All year	Y on leads (Pontins has a dog policy)	Camber and Broomhill	Recent investment in facilities; Day Passes for non-residents
Rye Harbour Holiday Park	Caravans & Mobile homes	Ownership Rentals Touring pitches	Large site Many facs	March - November	Y on leads	Camber and Broomhill/ Rye Harbour	Fishing lakes Next to nature reserve
River Brede Farm Campsite	Caravans, Motorhomes & Camping	Touring pitches	Small level site few facs	March - October	Y	Rye Harbour	
Winchelsea Sands Holiday Park	Caravans & Mobile Homes	Ownership Rental Touring pitches	Large site many facs	March - October	Y on leads	Pett Level and Pannel Valley; in	
Winchelsea View Caravan Site	Caravans	Rentals 5 caravans	Small private site	March - October	N	Pett Level and Pannel Valley	
Rye Bay Caravan Park	Caravans Mobile Homes Static caravans	70 pitches	Range of facilities include toilets, showers, play area		Y	Pett Level and Pannel Valley	
Ferryfields Holiday Home Park	Mobile homes	Ownership Rental 68 homes	Private site	License all year round	Y on leads	Rye Harbour/Romney Marsh	
Oak Valley Lodges	Lodges Glamping camping	Rentals	Shower block BBQ pits	March - October	Y	Just east of Pett Level and Pannel Valley (just over the Strategy area boundary)	Great location in AONB

Map X: Location of Camping and Caravan sites and Holiday Parks



Tourism seasonality

Most of the survey sites in the area are visited at all times of year. Some sites, such as Camber Beach, have an influx of visitors in the summer months, who come on day trips, on short breaks or on holiday; some of them staying in the holiday parks near the beach. Other sites may draw either one type of visitor – in the case of Broomhill, for example, the main users are kite-surfers, and they do not tend to visit the sites in the winter; or a very wide range of visitors – at Dungeness Point, for example, which attracts walkers, train passengers from the RHDR, sightseers, anglers, professional photographers and film-makers amongst others; and at this site visits are made all year round.

The seasonality of tourism is also affected by the times of opening of holiday accommodation and local attractions. The holiday parks and camping and caravan sites near the sensitive sites mostly open from spring to early autumn. However, there is a growing trend for caravanning and motor-homing out of season; and some sites are selling mobile homes and static caravans on their sites to private owners. Although there are restrictions on the all-year-round use of these holiday homes, it is likely that they will be occupied outside of the usual holiday periods.

The extension of the holiday season could have an impact on recreational pressure on the sensitive sites; in particular in the winter and early spring when over-wintering birds are present.

Both Shepway and Rother Councils have ambitions to extend the usual holiday season, and to attract more visitors into the area.

Strategic Initiatives and Projects

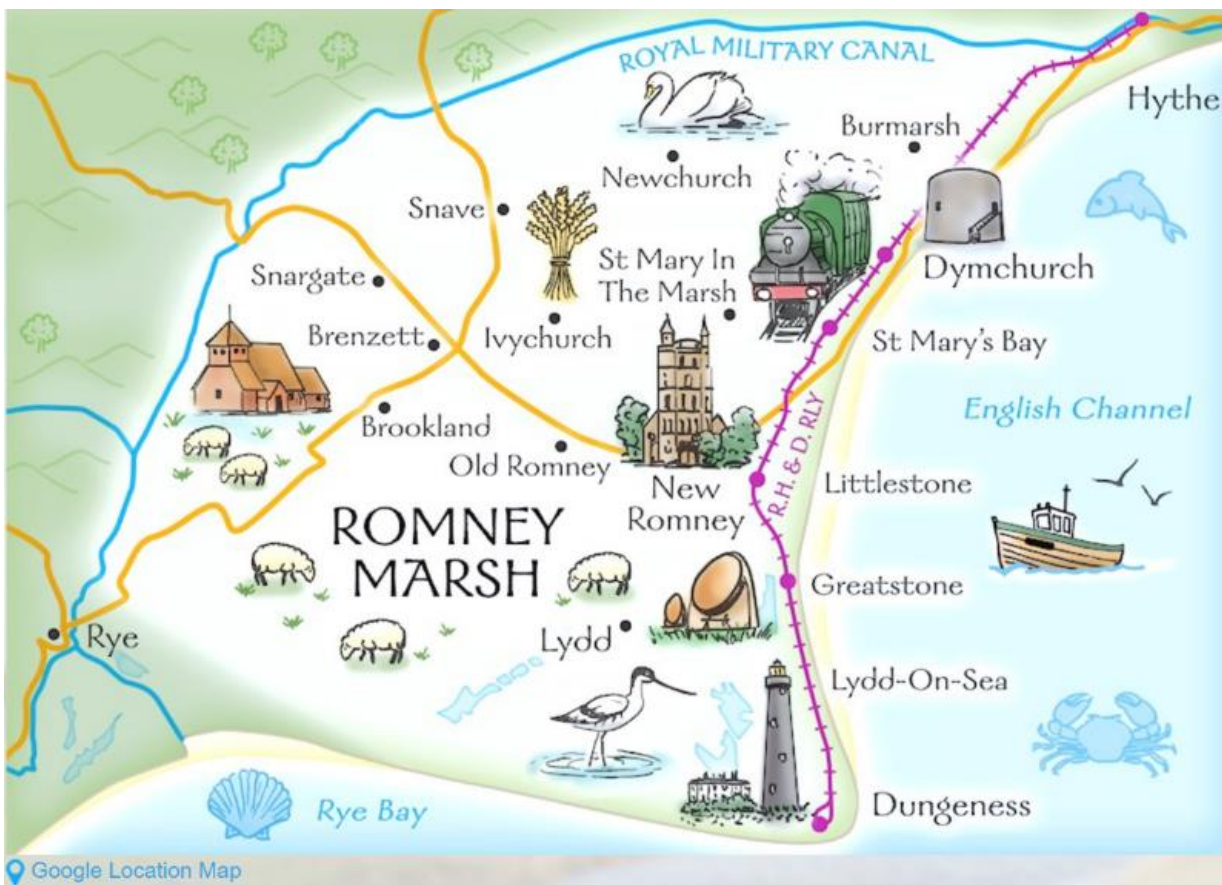
There is a range of organisations across the area which play differing roles in its management and development. Their roles vary from direct on-site management, to strategic overview and planning.

The local authorities of Rother and Shepway are involved in some of these groupings, either directly through membership, or indirectly through support.

The Kent Wildlife Trust is leading on the development of the Fifth Continent Programme (Figure 6 shows the extent of the area covered).

The programme area overlaps much of the Strategy area, and will be implementing projects to restore, re-create and enhance built and natural heritage features; studying areas of vegetated shingle and enhancing the biodiversity value of waterways. The programme invites local communities and visitors to rediscover their landscape and heritage through events, trails and leaflets. The programme is also engaged in developing a new brand identity for the Romney Marsh, and a new web portal.

Figure 5: Extent of Fifth Continent Project area⁴⁶



⁴⁶ From <http://theromneymarsh.net/home>

The Romney Marsh Countryside Partnership (RMCP) is a sister project of the White Cliffs Countryside Partnership (WCCP). It aims to care for the special landscape and wildlife of the Romney Marsh and Dungeness, and the promotion of green tourism through guided walks, cycle rides, countryside events and activities. The RMCP plays a key role in the management of the Dungeness Estate, where it has two dedicated members of staff funded by the landowners (EDF). The RMCP and WCCP also have a role in the on-site management of Greatstone Dunes.

The RSPB has a local base at the Dungeness Reserve, where it manages 1000 hectares of the National Nature Reserve (NNR), including a visitor centre; and is also a partner in the Dungeness NNR Partnership. The RSPB has the potential to take a broader role in the Strategy area, and has the advantage of a national profile and a strong brand.

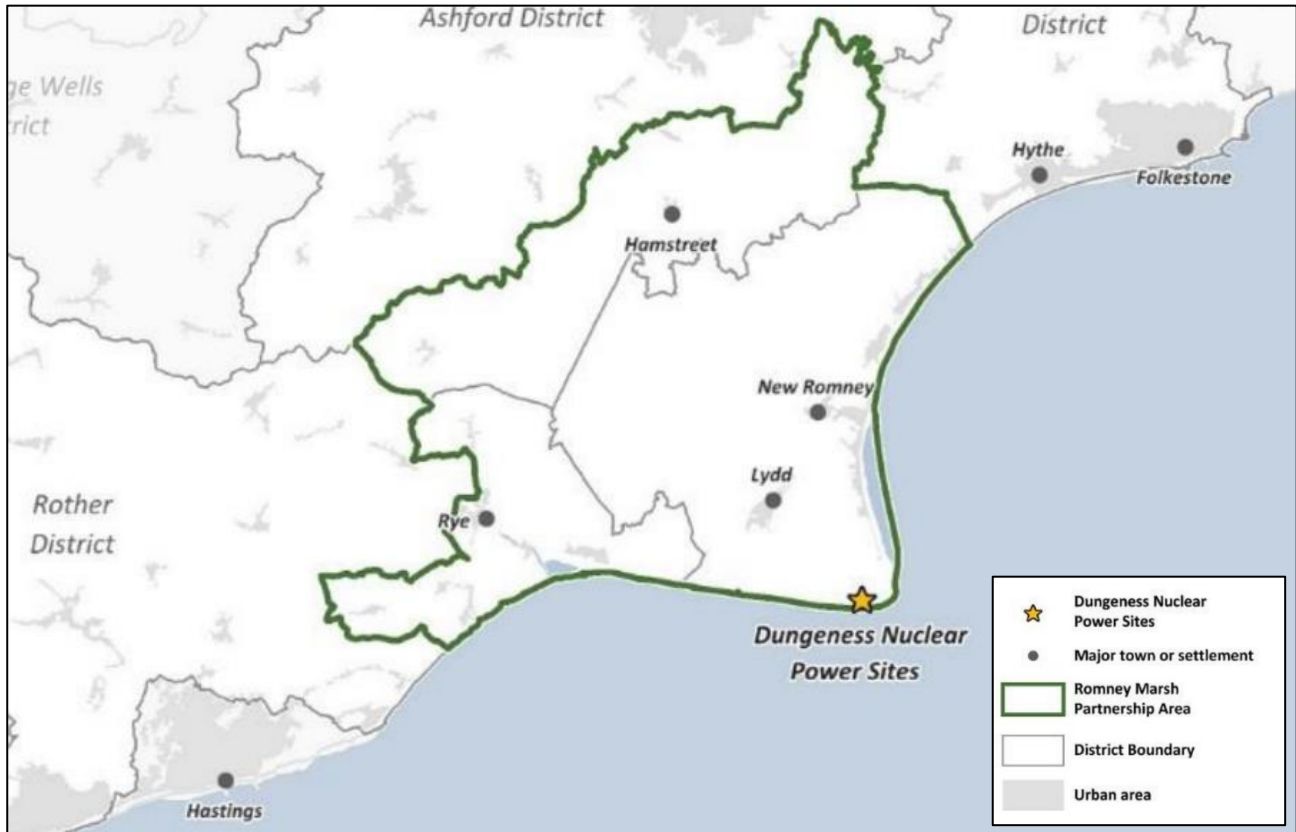
The Romney Marsh Partnership (RMP) is a socio-economic partnership which includes the area of the Romney Marsh and beyond (see also 'Economic Drivers' on page 7). The RMP was set up, following the announcement of the closure of the Dungeness A Nuclear Power Station, to make a case for prioritising the area to receive Nuclear Decommissioning Authority (NDA)/Magnox and other socio-economic funding and to produce a programme of work. Members of the RMP (see appendix for list of members) comprise organisations and representatives with an interest in and understanding of the local economy, including tourism which is an important driver of the local economy. The area of coverage of the RMP was extended, and now includes parts of the Ashford Borough and Rother District (see Map X below).

The RMP's job is to deliver the Romney Marsh Socio-Economic Plan - a strategy to support the area's economy and communities over the next decade; and the Romney Marsh Delivery Plan. One of the RMP's major successes to date has been the establishment of the Marsh Million; a £1 million fund to support enterprise and economic development in the project area.

The RMP aims to do its work by:

- highlighting some of the area's significant economic and social challenges;
- bringing people together and making the most of the excellent projects already being delivered on Romney Marsh;
- involving local people and giving them more of a stake in their local community and local economy;
- providing a framework and a strategy to bring new funding into the area through new projects and innovative approaches.

Figure 6: The RMP Area



The Rye Partnership brings together key stakeholders to develop a local community response to the socio-economic problems prevalent in the area. It is a membership organisation consisting of private, public, community and voluntary representatives.

The 1066 Country Marketing Partnership includes Rother Council, representatives from other local authorities in East Sussex and Hastings, the tourism and heritage sectors. It manages the 1066 Country brand and provides *'a continuous platform for businesses to work together'*.

Natural England (NE) has a key, statutory role in ensuring the appropriate management of the NNR, and is represented on a number of local partnerships and groupings. The Dungeness NNR and Rye Bay Partner Group has shared interest in the management issues of the NNR and the Rye Harbour Reserve, and works together to promote good practice. Members include the RSPB (Dungeness Reserve), Sussex Wildlife Trust (Rye Harbour Reserve), EDF (Dungeness Estate and Dungeness B power station), Magnox (Dungeness A power station), MoD (Lydd Ranges), Shepway and Rother Councils (officers), NE, RMCP (Dungeness Estate management), Kent Wildlife Trust and the Internal Drainage Board.

The Government has encouraged the establishment of Coastal Community Teams (CCTs) in some coastal areas, to enable local communities to come together to develop a common vision and plans for their area. In the Strategy area, there is a CCT in place in Dymchurch, Shepway, which is working with the community to develop plans for the future of Dymchurch.

The Sussex Wildlife Trust is responsible for the management of the Rye Harbour Reserve. The Reserve Manager also plays a key role on the NNR Partnership and in the wider nature conservation interests of the area.

Other groups include:

The Wealden and Rural Rother Partnership (WARR)

The Sussex Tourism Partnership

The East Kent Regeneration Board

The Kent and Medway Economic Partnership (KMEP) - set up in 2013 and is one of the four federated partnerships which comprise the South East Local Enterprise Partnership (SELEP)

Commentary and Conclusions

The Strategy area has a lot to offer to visitors, and the local economy depends on the continuing success of its tourism offer. The value of staying trips and day trips is estimated to be in excess of £230million per year for the economies of Shepway and Rother, and the volume and overall value of tourism to the local economies are increasing. Tourism is also important to local employment, and provides almost 20% of jobs in Rother, and nearly 13% of jobs in Shepway.

There are a number of distinctive tourism destinations, both on the coast and inland; each attracting different market sectors, with differing types and levels of promotion, marketing and branding. The area is made up of a series of distinct destinations, each of which has its own features and profile. Shepway currently has no specific brand for its part of the Strategy area, while Rother's strong '1066 Country' brand is applicable to the whole district, and includes the Rother part of the Strategy area; although its focus on heritage and castles - while conveying an image of high quality heritage - may not be entirely appropriate in branding the visitor offer in this area.

Shepway and Rother each receive far greater numbers of day visitors than staying visitors. The local authorities are looking to ways of expanding their visitor offer and attracting more visitors to stay in the area; in Shepway's case, for short breaks, with a focus that includes the countryside, walking, outdoor activities, heritage and culture; and in Rother a focus on higher quality markets and those that are 'related to, and support, the area's high environmental qualities'.

However, the area is home to some of the UK's rarest species, and is afforded legal protection at an international level. This is beneficial in supporting and protecting the wildlife interests, but it is a 'double-edged sword' as it can appear to be worthy and out-of-step with other activities. In addition, the species and habitats for which the sites are designated may not be well-understood by visitors and therefore may not be fully appreciated.

There is a disjoint between the economic needs of the local areas, the associated growth of the visitor economy, and the natural environment which may be perceived as a constraint to economic growth.

The location of the Strategy requires coordinated working across the political and administrative boundaries, and across economic and environmental sectors. The link between tourism and economic development in this area is very strong. There is already a good base of cross-sector support - and at a high level - for economic development activity, through the RMP; and at the product development and delivery level by the Fifth Continent Project. This could be built on to support the delivery of the SARMS into the future. There may be potential for organisations or groupings to extend their remit or area of operation and bring parties together.

In relation to areas close to the sensitive sites, issues of concern include:

- the extension of the tourism season into the winter months;
- the unmanaged growth of tourism businesses, leisure operators and attractions in areas where expansion or diversification may affect the levels of recreation pressure;
- the potential growth of rural tourism;

- the move towards residential ownership of properties in holiday parks;
- developing new walking and cycling routes or other activities which will attract greater numbers of visitors into sensitive areas;

There is a need to:

- Minimise the recreational pressure on the designated areas and sensitive sites and at the same time support tourism and the local economy;
- Change perceptions regarding the wildlife interest of the area. The diversity of the area and the natural environment are positive assets that can boost the area, and should be welcomed by the tourism industry, but this will take work. This is essential, and should be central to tourism in all sectors, especially the business sector. For tourism to continue to develop and grow in this area, there needs to be a better understanding of the issues and possibilities. A cross-sector approach will help to develop a shared understanding, move ideas forward and find new ways to develop tourism.
- Strengthen the visitor offer of the area's 'natural assets' through a more coordinated, joined-up approach to promotion and marketing, working across boundaries and sectors, with neighbouring authorities, marketing organisations and other specialists;
- Consider a brand for the strategy area so that the (different) offer made by each visitor destination is distinct but part of an overall package that the area provides;
- Improve the visitor experience at the sites or attractions, by providing the visitor facilities and infrastructure necessary to support the key activities, within the site's 'natural' limits;
- Strengthen delivery through developing a more coordinated approach to planning and resourcing;
- Limit the impact of some activities – in particular those activities that may be gaining in popularity – by a range of methods e.g. on-site activity zoning, Codes of Conduct, limits on development and season of operation and - potentially - diversion to other suitable sites;

Appendices

Appendix 1: Strategy area promotion: Websites and their links

<https://www.visitbritain.com/gb/en/england/southeast#l6WxwyQmRFVCutLG.97>

with no obvious links to the Visit England website.

EAST SUSSEX

<https://www.visitengland.com/explore/south-east-england>

links to East Sussex:-

<https://www.visitengland.com/things-to-do/east-sussex>

Mainly shows places in Brighton and Eastbourne areas but the headline destinations keep changing

No obvious link to Visit South East England website or places in Rother

<http://www.visitsoutheastengland.com/>

link to Hastings <http://www.visitsoutheastengland.com/places-to-visit/hastings-p196141>

with link to 1066 country website

additional links to Rye <http://www.visit1066country.com/explore-1066-country/rye>

and Battle <http://www.visitsoutheastengland.com/places-to-visit/battle-p195861>

with link to 1066 country website

and Camber <http://www.visit1066country.com/explore-1066-country/camber>

<http://www.visitsoutheastengland.com/places-to-visit/rye-p274421>

with link to visit 1066 country website

with link to Royal Military Canal <http://www.visitsoutheastengland.com/things-to-do/royal-military-canal-p650801>

with link to Rye Harbour Nature Reserve <http://www.visitsoutheastengland.com/things-to-do/rye-harbour-nature-reserve-p60043>

with link to Camber Castle <http://www.visitsoutheastengland.com/things-to-do/camber-castle-p44063>

No obvious links to Visit Sussex website

<http://www.visitsussex.org/>

with link to Hastings <http://www.visitsussex.org/page/hastings/>

with link to 1066 country website <http://www.visit1066country.com/>

with link to Rye <http://www.visitsussex.org/page/rye/>

and link to Rye Bay website <http://www.visitryebay.com/>

KENT

<https://www.visitengland.com/explore/south-east-england>

with link to Kent :-

<https://www.visitengland.com/things-to-do/kent>

Information on parts of Kent including Romney Marsh

Link <https://www.visitengland.com/experience/explore-romney-marsh>

With further links to

<http://www.visitkent.co.uk/destinations/folkestone-hythe-and-romney-marsh/11313>

<http://www.visitkent.co.uk/discover-folkestone/romney-marsh-tour.pdf>

and links to other Romney Marsh and Dungeness websites including Fifth Continent

Good website on Romney Marsh <http://theromneymarsh.net/> Fifth Continent

Dungeness NNR information <http://www.dungeness-nnr.co.uk/>

<http://www.visitsoutheastengland.com/>

with no direct links to Romney Marsh, Dungeness, Hythe or Folkestone although some places and attractions like RHDR can be found by searching eg :-

<http://www.visitsoutheastengland.com/things-to-do/romney-hythe-and-dymchurch-railway-p61153>

and Royal Military Canal (see above in East Sussex)

and places as follows:-

<http://www.visitsoutheastengland.com/places-to-visit/dungeness-p1272001>

<http://www.visitsoutheastengland.com/places-to-visit/romney-marsh-p208161>

<http://www.visitsoutheastengland.com/places-to-visit/dymchurch-p1272651>

Also:-

<http://www.dungeness-nnr.co.uk/>

Appendix 2: Membership of existing initiatives

Membership of the Romney Marsh Partnership

- Shepway District Council
- Kent County Council
- Dungeness Site Stakeholders Group
- Channel Chamber of Commerce- now Kent Invicta Chamber of Commerce
- Romney Resource Centre

- The Marsh Academy
- Magnox Energy Solutions
- The Nuclear Decommissioning Authority
- Ashford Borough Council
- Rother District Council
- The Rye Partnership
- East Sussex County Council
- Lydd Ashford Airport – joined 2015
- Action for Communities in Rural Kent

Current membership of the Shepway DMP Steering Group

- Shepway District Council: acting as Chair
- Folkestone Town Council
- Romney Marsh Partnership
- Visit Kent
- BOSCO
- Business sector representatives from: -
 - Burlington Hotel (also representing Folkestone Hythe & District Hotel & Catering Association)
 - Creative Foundation
 - Grand Hotel (also representing Folkestone Town Centre Management)
 - Grand Burstin Hotel
 - Hythe Imperial Hotel
 - Strand House (Roger De Haan's Private Office)

Potential new membership from the following sectors:

- Heritage
- Hythe
- Kent County Council: Explore Kent
- Rural areas: e.g WCCP; KWT;
- Training / Education
- Transport
- Visitor attractions