

BLUE SAIL ▶

VISITORS PLACES DESTINATIONS

THE NATIONAL FOREST TOURISM GROWTH PLAN
FINAL DRAFT

REPORT FOR THE NATIONAL FOREST COMPANY

MARCH 2017

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1 ABOUT THE GROWTH PLAN

This is a tourism growth plan for The National Forest. It sets out an ambitious 10-year strategic plan for how we will realise the potential of the Forest as a visitor destination and how tourism will contribute to transforming lives, the landscape and the economy.

This Plan has been produced by the National Forest Company for the whole of the Forest. It builds on 25 years of achievement and successful partnership working across the tourism sector. This new Plan needs businesses, local authorities, landowners, communities and everyone who has an interest in forest life, to share its ambition. So, the 'we' referred to in this Plan means all these partners, who will continue to work together to deliver it.

The National Forest is one of Britain's boldest environmental projects: the creation of a new forest across 200 square miles of Leicestershire, Derbyshire and Staffordshire, linking the ancient forests of Needwood and Charnwood. Over the last 25 years we have created a woodland economy and a beautiful landscape for everyone to enjoy.

Now The National Forest is coming of age as a visitor destination. The next 10 years are about moving from an emerging destination into an established one.

First and foremost, that means looking after the Forest. It is a unique asset and we want our visitors to value it as much as we do. This Plan is about the wise growth in tourism, creating great inspiring and stand out places and experiences, and stimulating a cycle of investment to enable the Forest to thrive as a destination.

This Plan sets out what we need to do to make that happen.

THE AMBITION

We want The National Forest widely recognised as a very special destination. We want it to be known as a place where life is different, enriching and rewarding; a place to connect with nature and each other; and a place where everyone is welcome. We want visitors to seek us out for a day trip or a short break because they know what they experience in The National Forest isn't available anywhere else in quite the same way.

All the businesses and organisations in the Forest will have its best interests at heart and value the role tourism can bring to the vitality and sustainability of the Forest. That will be reflected in the way we do business, what we choose to invest in and how we work together.

In the next 10 years we want:

- ▶ To grow visitor spend by 15%.
- ▶ To create and sustain over 700 new jobs in the visitor economy.

These are ambitious targets and exceed the growth we've achieved in the previous decade. Our growth in spend will be achieved by growing the volume of short breaks and by increasing the spend of our day and overnight visitors.

THE JOURNEY SO FAR

The first 25 years have been about building the destination. We've made good progress and there have been some great achievements in our first wave of investment. We've created the National Forest Way - a walking trail extending over 75 miles; enabled the Hicks Lodge Cycle Centre - a dedicated cycle hub for the Forest; and delivered a Youth Hostel and the award-winning attraction Conkers. And of course, we've planted thousands of trees and the Forest is maturing and expanding. But we still have a way to go to selling the collective National Forest as a destination and in creating a joined-up, consistently high-quality Forest experience.

The next 10 years are all about making that step change. We are at the beginning of a new chapter and we've started by taking a fundamental review of the potential. We've identified our best prospect markets, people who will embrace the values of The National Forest, and we've developed a Marketing Strategy that sets out how we are going to encourage them to visit. We've undertaken a Destination Audit and Gap Analysis and we are clear about what infrastructure investments we need to deliver a special woodland experience for our visitors. And we have developed a new brand for the Forest.

A NEW WAY OF WORKING

To achieve our growth targets, we will:

- ▶ **Lead with our brand** – that is all about creating a very special woodland place; a Forest where people come for inspiration, to feel empowered and grounded and to connect with each other
- ▶ **Develop distinctive visitor experiences** that bring our brand to life for **our target markets**
- ▶ **Create great places people want to visit**
- ▶ **Communicate what makes the Forest special** – with a strong single voice.

2 OUR VISITORS

We have identified four target markets. Here is a snapshot of what these markets are all about.

Fun Families	New Traditionals
<ul style="list-style-type: none"> ▶ Urban living about an hour's drive from the Forest ▶ Parents in 30s/40s with kids under 10; some multi-generational groups ▶ Price conscious but comfortable ▶ After a good deal 	<ul style="list-style-type: none"> ▶ Couples and families spending time doing things together ▶ Wise spenders; pay for 'right' experience ▶ Believe in a healthy work-life balance ▶ Invest in improving environment and community, giving back
Easy Active Adults	Special Interest Groups
<ul style="list-style-type: none"> ▶ Couples, 50+ empty nesters ▶ Financially pretty comfortable with disposable income to spend ▶ After a good deal 	<ul style="list-style-type: none"> ▶ Visitors with a passion, hobby or specific interest e.g. runners, photographers, ramblers, cyclists, bird watchers ▶ That passion drives destination choice ▶ Visit at weekends & on holidays; weekdays if retired

The **New Traditionals** offer us the greatest growth opportunity because what is important to them is what The National Forest values - sharing experiences, creating memories and giving back to causes you care about. We estimate there could be around 4.5m¹ New Traditionals in the UK with a concentration living in the Midlands, a large catchment of whom are on the doorstep of the Forest, and provide a great opportunity to attract for 'a holiday close to home'. New Traditionals are couples and families with a relatively high disposable income but lots of choice; they are well-travelled, sophisticated and looking to discover something new and different. We need to deliver a competitive offer to attract them.

Fun Families and **Easy Active Adults** are already important markets for day trips to the Forest and will remain so. We will continue to ensure we deliver the experiences they are looking for, encourage day visitors to come more often throughout the year and to extend their length of trip. And of course, many of the things we do to attract and deliver experiences for New Traditionals will benefit the experiences of these markets too.

More people are developing side projects and committing time to a long-term interest or hobby as part of the trend in well-being and rediscovering the simple things in life. That means the many niches that make up the **Specialist Interest Groups** also offer good prospects for The National Forest, especially pastimes and passions that relate to nature, outdoor activity and arts & crafts.

¹ Estimated by aligning the characteristics of New Traditionals with Mosaic segments

3 GOING FOR GROWTH

A thriving tourism sector in the Forest needs:

- ▶ To provide a critical mass of things to do that are special to the Forest that create a strong joined-up offer
- ▶ To deliver a consistent quality across all the Forest experiences – including refreshing and investing in our current attractions and places to stay
- ▶ To deliver a year-round experience that makes best use of the opportunities of the four seasons of the Forest and provide reasons to visit now
- ▶ To deliver more accommodation to allow The National Forest to grow overnight tourism, while recognising that day visitors remain an important core market.

THINGS TO DO

Activities sit at the heart of the Forest experience from walking and cycling to tree climbing and bushcraft. The National Forest needs a strong core of woodland trails and routes supported by a critical mass of woodland activities that give visitors hands-on, engaged, in-depth experiences that go beyond the ordinary.

The National Forest Company will focus on realising the potential of its investment to the National Forest Way. We want to create a truly excellent walking experience for visitors whether they are exploring a short stretch of the Way or long-distance walkers. That means investing in woodland infrastructure and providing all the facilities our visitors need to enjoy this trail.

Activities are a real opportunity to attract new visitors to the Forest and to encourage our loyal repeats to come back to try out something new. Activities have the ability for the Forest to build up a year-round revolving programme of things to do, which can be regularly refreshed.

Customers are more discerning than ever and are choosing places to visit which provide excellent quality and value for money. It is essential that our Forest attractions reinvest and periodically refresh their offer to remain competitive. We want to work with quality attractions in the Forest to mutual benefit and in ways that strengthen the experience and create hubs of activity.

But if we are going to grow tourism and extend our visitor season, we also need more 'on-brand' year-round attractions. We need to identify the type of companies we want to attract into the Forest and work with them to secure their investment. That means a joined-up experience for investors from concept stage, through planning and construction to attraction launch. Partners in the Forest need to work effectively together to deliver that. We need to be forward thinking, open to creative ways of delivering great experiences and to draw on examples of what works well and why, to inspire us.

What we are going to do

- ▶ The National Forest Company will expand the network of well-signed trails and circular routes on the National Forest Way, encourage businesses to develop activities along the route, invest in walker facilities in their holiday accommodation and identify locations close to the route for further accommodation development
- ▶ The National Forest Company will also provide opportunities for further walking, cycling and riding in key woodlands.
- ▶ The National Forest Company will work with local authorities and Destination Management Organisations (DMOs) to market test opportunities for new woodland-related activities and attractions, develop a prospectus and then target suitable businesses to invest.
- ▶ Stakeholders will work together to identify funding sources to help existing attractions invest in their experiences.

Festivals

The Forest provides an exciting and distinctive environment in which to stage events throughout the year.

Festivals create a reason to come now, introduce new visitors from the New Traditionals market who we want to introduce to the Forest in larger numbers, present opportunities to showcase the Forest and its values, and to expand perceptions of what a Forest experience can be.

Festivals come in all shapes and sizes. We want to support many of the smaller events that are already happening. Where possible we want to bring them under the umbrella of the Forest brand to strengthen their positioning. That will help present a higher profile festival offer to our target markets, in

a crowded festival marketplace. We want to see more and higher profile sports and endurance events taking place in the Forest too, building on what is happening already.

Overtime, we also want to create new festivals of scale with the potential to attract overnight visitors. We want festivals that illuminate our brand and which are unique to The National Forest.

What we are going to do

- ▶ Partners will work together to develop our own Forest Festival, a quality distinctive event that is 'of the Forest' and has the potential to grow over time. This might be a themed event or a festival season that draws together existing activity and then augments and adds to it.
- ▶ The national Forest Company will work with partners develop the potential of The National Forest Walking Festival to tell more of the Forest story in ways that appeal to New Traditionals and Specialist Interest Groups to create a unique event.

PLACES TO STAY

If we want more overnight visitors, we need more places for them to stay. Investment in new accommodation happens across the country and we welcome all new accommodation to the Forest. The intervention of the National Forest Company will be around creating places to stay that can only be found in woodland or accommodation that is about the Forest in some way. For example, places to stay that are proud of the local provenance of their food and drink, and that demonstrate strong environmental credentials.

Households are changing with more people living alone, more single parent households and more multi-generational families. We are seeing more large groups holidaying together, more multi-age groups seeking accommodation and things to do and more adults travelling without children. We must provide a choice of places to stay that can meet this range of requirements. Woodland is well-placed to respond to the challenge and offer interesting places to stay that are an attraction in their own right.

Therefore, our focus is to encourage woodland forest accommodation from tree top bedrooms to lodges to distinctive self-catering. We will support developments of scale that create the volume of beds that we need which do not compromise our environmental values.

What we are going to do

- ▶ The National Forest Company will work with local authorities to create and promote a Forest accommodation prospectus
- ▶ The National Forest Company, local authorities and DMOs will work together to develop seamless support to businesses to encourage investment in existing and new, distinctive smaller scale accommodation.

4 PEOPLE & PLACES

OUR PEOPLE

Successful tourism is all about thriving businesses and satisfied customers. We will support businesses to develop a culture of service that will help The National Forest compete on quality and contribute to creating great places.

The National Forest Company will work with DMOs, with local authorities and businesses directly to support Forest-led tourism development and promotion. That means working with attractions, shops, cafés, restaurants and pubs and local food-producers and with accommodation providers – from hotels to lodges to quirky Forest tree top self-catering and new Airbnb providers.

We want to ensure businesses understand what our markets want and how the Forest brand can benefit their business. We want to equip people with the product knowledge so they are up-to-speed in the latest digital marketing to take the brand to market in ways that support the vitality of their business and deliver great experiences for our visitors.

The National Forest Company is working with Destination Staffordshire to create a bespoke Forest package of small business support. The National Forest Company has also launched a #forestlife toolkit that can provide businesses with flexible resources to support their business.

CREATING GREAT PLACES

We need to create high quality environments within our woodlands and in our forest towns. Visitors need to know when they are in The National Forest. Our brand must be evident in the way places are presented and managed. We want our visitors to be able to taste local produce and buy things that have been made from the Forest or inspired by it.

This is about good destination management and encouraging local partners in towns and settlements to embrace tourism as part of a mixed and sustainable local economy.

We want business owners to choose The National Forest because they share its values, see the opportunity tourism offers and want to be part of its success. Visitors create a demand for new Forest products and services and their custom adds value to existing businesses serving local communities. Signing and interpretation is a particular challenge for The National Forest. We need clear boundary and road signs, and consistent, well-maintained Forest branded signs that instil confidence in visitors to explore, and to reinforce the Forest's distinctive sense of place. The National Forest brand must become a trusted quality marque and we will require businesses using it to meet agreed quality standards.

What we are going to do

- ▶ The National Forest Company and DMOs will work together to roll out a bespoke Forest package of small business support including for customer skills training.
- ▶ We will support the greening of towns, e.g. greening public spaces and roadside tree planting
- ▶ The National Forest Company will produce brand guidelines for partners to enable them to align their brand with the Forest brand.
- ▶ The National Forest Company will lead on reviewing and signing all the key woodland venues, adding new signs where needed and working with landowners to encourage maintenance of local signs.

5 MARKETING & PROMOTION

Our Tourism Marketing Strategy sets out our priorities and the future focus for our marketing activity. It leads with our brand. A first step in working together to roll out the brand is encouraging businesses that share our values to sign up to #forestlife to raise the profile of The National Forest with our visitors. As the brand develops there will be more opportunities for collaboration between the National Forest Company, businesses and DMOs on marketing opportunities.

Wider technology use is changing how people research and book their holidays – and what they expect whilst there
Wider access has broadened the range of information consumers have access to – traditional sources now compete with recommendations from peers.

Domestic Leisure Tourism Trends for the Next Decade, 2013, Visit England

We are taking a much stronger digital focus to our promotional activity, to get our brand message out in the marketplace more effectively. 85%² of leisure travellers now consider the internet as their main source for planning travel. Our visitors are important advocates for The National Forest through the experiences they share on social media and we need to encourage, monitor and communicate that content.

The modern customer journey is complex. It's important to focus on the key moments that can help inspire people to come.

² Google, 'The 2013 Traveller'

What we are going to do

We will:

- ▶ Single-mindedly target high growth target markets as tightly as possible with motivating messages, using the most appropriate media channels
- ▶ Support an integrated approach to marketing across promotion, PR, information and interpretation of the Forest and exploit digital marketing opportunities
- ▶ Develop joint-promotion and collaboration opportunities with Forest-friendly brands
- ▶ Produce brand guidelines to enable partners to align their brand with the Forest brand.

6 MAKING THINGS HAPPEN

RESEARCH & EVIDENCE – MONITORING PROGRESS & EVALUATING SUCCESS

We need to understand how our actions are realising our growth targets, be clear about what is successful so that we can confidently do more of it, and objectively evaluate where actions are not delivering the impact we are seeking, so that we can evolve, learn and refine what we do.

We will:

- ▶ Monitor economic impact using STEAM
- ▶ Undertake periodic visitor satisfaction surveys - to understand more about who are visitors are and rolling out the brand
- ▶ Develop an evidence base to support future development and strategy and inform what we do.

We are ambitious about the future, confident we can build on our achievement so far and accelerate growth over the next decade. We want to work closely with local authorities on policy, planning and regeneration and with DMOs on marketing and business support. And we want to develop strong relationships with the many Trusts, businesses and communities in the Forest who manage our great visitor experiences. We will work with Visit England and other national partners to raise our profile on a national stage and contribute to thought leadership in tourism.

Key to success is playing to our individual strengths, pooling our creativity and skills and using available funding streams creatively and productively to realise our ambitions, including aligning existing funds more effectively. We are already working on projects where we are doing just that, for example bidding with other landowners for funding to establish new Landscape Partnerships and working with local companies who encourage their guests to make a donation to plant trees.

Collectively we are stronger together and need strong joint working across the Forest to deliver this Plan. The National Forest Company invite you to join us on the journey to help realise the tourism potential of The National Forest.