National Forest Company **June 2009**

A VISION and ACTION PLAN
for
SUSTAINABLE TOURISM
in
THE NATIONAL FOREST

APPENDICES

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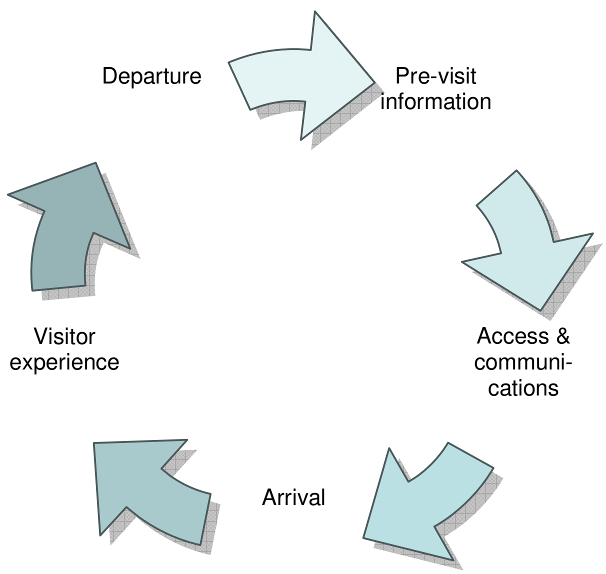
APPENDIX I: CURRENT TOURISM CONTEXT

In this Appendix we look at the current tourism product in TNF, the existing visitor market and review how it is performing as a tourist destination.

AI.1 The visitor journey

We have analysed the tourism product using the sequence of a visitor journey as a framework from the planning stage, through the visit experience to departure.

Fig AI.1: The Visitor Journey



<u>AI.1.1 Pre-visit promotion and information</u>

The main guide books do not feature TNF as a visitor destination and the area covered by the Forest is, more often than not, divided into two sections in the guides (East / West Midlands).

- The Lonely Planet guide to England has the best coverage in that it has an entry for ‘Conkers and The National Forest’ in the ‘Around Leicester’ section, as well as entries for Ashby-de-la-Zouch and Calke Abbey.
- The Rough Guide to England does not mention TNF but has entries for Calke Abbey (“the fascinating mansion of Calke Abbey”) and Ashby-de-la-Zouch (“far from rustic but it’s still an amiable little place”), Breedon on the Hill and Staunton Harold Church.
- The Eyewitness Great Britain guide mentions TNF in the introduction to its East Midlands section, but does not list any of the key towns or attractions within the Forest.
- The Cadogan Guide to England has an entry for Burton although it is rather out of date and still refers to the Bass Brewery museum.

- Fodors Guide to England carries no mention of the Forest area at all.

For the visitor, the main formal source of pre-visit information is the internet. The NFC has a dedicated website (www.visitnationalforest.co.uk) which has a section called ‘Visit and Explore’. This contains basic information on what you can do in the Forest, with links to accommodation, attractions and events via an interactive map. The site is in the process of being redesigned to make the information clearer and more accessible. The DMP websites also cover TNF although not as a main feature. The local authority websites also have tourism/leisure web pages.

The National Forest & Beyond Partnership, facilitated by TNFC, produces, publishes and distributes an annual Visitor Guide with an Attractions Guide and Group Visits Guide. The former has a print run of c50,000 (attractions supplement has print run of c150,000) and is distributed via various outlets throughout the local area and further afield and posted out on demand. Currently around 80 businesses buy in to the guide and this has remained fairly static over recent years. TNFC also publishes a pack of walks and other guides for educational visits and groups.

The DMPs each produce a traditional brochure with some coverage of TNF. The local authorities produce print for various council sponsored attractions and events. Individual operators promote their own facilities.

The main promotional campaign for TNF is ‘The National Forest and Beyond’ campaign co-ordinated by TNFC. This includes the Visitor Guide above as well as attendance at events such as the Outdoors Show, Gardener’s World Live, Ashby Show, Festival of Leisure and National Forest Wood Fair. Tourism PR involves press visits e.g. Country Walking, Sunday Express, Daily Telegraph, Birmingham Post, Leicester Mercury, Derby Evening Telegraph as well as TV and radio coverage. NFC also runs four familiarisation visits a year designed for journalists and regional TIC staff.

Individual operators have their own promotional material but, unfortunately, there is no common approach by stakeholders to National Forest branding in their promotional media. This compromises the potential for raising awareness of the Forest as a destination[1].

Key Issues:

- *The profile of TNF remains low in national and regional tourism guides.*
- *A good range of information on tourism in TNF is available.*
- *There is no common branding of information which would help raise the profile.*

AI.1.2 Access and communications

TNF is located in the centre of England and benefits from excellent road access from across the country via the A38, M42 and M1. East Midlands Airport is close to the north eastern border of the Forest and Birmingham International is just over 20 miles to the south west.

Access by public transport is not good. There is only one station in the Forest, at Burton upon Trent, although this is on the main Cross Country line linking to Birmingham and Nottingham as well as further afield (Plymouth, Cardiff, Newcastle

1 IT systems are fragmented amongst operators across the National Forest. Take up of on-line booking systems in the B&B serviced accommodation sector is very limited.

and Edinburgh). There are a number of mainline stations surrounding the Forest – at Nuneaton (c20 miles), Leicester (c25 miles), Loughborough (c18 miles) and Derby (c20 miles). There is an ambition to open the existing freight line from Leicester to Burton as a 'National Forest Line' which will link the main towns of Coalville, Ashby, Swadlincote and Burton in TNF. There is also an ambition to develop Lichfield Trent Valley station as a gateway station with better services to London which would also benefit the Forest.

Public transport links from rail stations to the wider Forest are poor. There are a number of local bus services through and around the Forest but they are not geared for leisure visitors; timetables are limited, particularly at weekends and many of the attractions are in rural areas. This means that getting around the Forest is easiest by car; there is a network of attractive country lanes linked to the main access routes. Congestion is not currently a problem.

Key Issues:
- *TNF has a central location with excellent road links from across the country but only one train station in the Forest at Burton.*
- *Public transport within the Forest is also poor and as a result most visitors come by private car.*

AI.1.3 Arrival and welcome

TNF covers an area of 200 square miles with numerous entry points. However, even at the key gateways, some of the welcome signs lack impact, particularly where there is no evidence of trees. The A38, as the most important access route presents a particularly dismal gateway with its unappealing and litter-strewn fringes. In general, there is a very weak sense of arrival as the visitor crosses the Forest boundary.

Many villages now have National Forest signs which help raise awareness once in the Forest and the Visitor Information Project (VIP) undertaken by TNFC with significant financial support from both RDAs has greatly improved awareness, orientation and information at key points around the Forest. Most major attractions and honeypot sites now have clearly branded orientation boards, information and brochure racking, including all the major attractions and gateway sites from the Youth Hostel to Burton Station, from the NMA to Snibston[2].

There are manned Tourist Information Centres (TICs) at Burton (soon to be re-located to the Market but as a Community Resource Centre), Ashby and Swadlincote.

The Locum report[3] gives a comprehensive analysis of signage in the Forest and, although a few years old, there are some issues which have not been resolved. There is no co-ordinated or TNF branded directional signage within the forest; it is up to each individual attraction to make its own arrangements with some attractions having ordinary white-on-brown signs and others having little signage.

[2] Burton station now has a themed display on the main platform as well as the branded information panels and racking in the ticket area.
[3] The National Forest visitor information project, Locum Consulting, 2005

Key issues

- *TNF covers a large area and can be difficult to read as a destination.*
- *There is currently an inconsistent ‘sense of arrival’ when entering the Forest.*
- *Visitor information and orientation at the main attractions is good.*
- *Signposting within TNF could be improved.*

AI.1.4 The Visitor Experience

Countryside and the Forest. TNF is a rural destination but contrary to what the name suggests, the area is only c20% covered with forest, and much of this is new, still immature and dispersed, planting. As a result it is often difficult for a visitor to understand the ‘forest concept’ (which includes open space as much as woodland) and there is a danger that people wonder where the forest actually is. However, there are some larger traditional woods, including Charnwood Forest and Jackson’s Bank, and new woodland e.g. around Rosliston Forestry Centre and Sence Valley which provide visitors with a real forest environment. The old and new wooded areas - which will grow over the next 20 years to fill specific gaps and around 30% coverage - are supplemented by significant areas of public access to many other important open spaces (Bradgate Park, the Washlands) and water features including Staunton Harold and Foremark reservoirs, the canals and various country parks.

Conkers is the focal point for interpretation of TNF with a major exhibition not only of the Forest and its evolution (which is an important story in its own right) but also the wider environmental messages. Rosliston is another focal point for interpretation. Other individual attractions tell their own stories about the area e.g. Snibston and Ashby Museum explain the industrial and social history, the story of local landowners is told at Calke Abbey and Melbourne Hall. However, a uniform, simplified Forest story is now told at 36 sites around TNF under the VIP. Some of these sites also have video features.

Many of the attractions in the Forest run educational courses for schools and other groups, using the Forest as an educational resource and telling the different stories of the Forest.

Key Issues:

- *Although the Forest is growing, the visitor will continue to see large areas with no trees as the overall goal is to have around one third woodland cover.*
- *The wider countryside offer is however attractive, diverse, accessible and robust - but does not compete with the likes of the Peak District as a renowned countryside destination.*
- *Interpretation of TNF is handled in different ways at various sites. Some more co-ordination may be appropriate.*

Towns and villages. TNF has four larger towns and around 50 smaller villages. These towns and villages provide important services and amenities for visitors, and can – and should - be attractions in their own right.

- Burton is sometimes referred to as the ‘Capital’ of TNF. It is the largest town and retail centre with a standard mix of comparison shops. It has an attractive river frontage with water-based activity on the river and canal and a rich brewing heritage although the Coors visitor centre has recently closed. This means there is no special visitor draw in the town[4]. It does have a body of visitor accommodation but it is largely peripheral to the centre, most of it in budget hotels. There are significant planned improvements to the town centre as part of the growth centre proposals.

- Swadlincote was a major centre for extractive industries until the 1980s. The heavy industry has now been replaced by modern commerce so the ‘industrious’ ambience pertains. Significant effort has been put into regeneration of the town centre and environmental improvements eg Swadlincote Woodlands and ski centre - and will continue under the growth area plans - including new woodland, building restoration e.g. Sharpe’s Pottery/TIC and investment in the High Street retail area.
- Ashby de la Zouch is a very attractive old spa town in a rural setting with a castle, museum, TIC, various hotels and B&Bs, many attractive historic buildings and a selection of interesting shops. There are plans for further enhancement. Ashby is the urban ‘gem’ of TNF offering an attractive focus for both the industrial/mining heritage and the new woodland areas.
- Coalville, like Swadlincote, suffers from a poor image and a physical heritage in need of major change. The planned growth in the area should provide the stimulus for such change. Coalville is already home to Snibston, one of the Forest’s major attractions.

The villages provide a limited range of facilities and services, including pubs, B&Bs, local retail services and some have countryside walks. Each has its own particular atmosphere. Those of note within and on the fringes of TNF include: Melbourne, Repton, Tutbury, Newtown Linford, Breedon on the Hill, Ticknall, Hanbury, Yoxall, Newchurch, Walton on Trent, Coton in the Elms.

Key Issues:

- *Burton is the commercial capital and a potential major gateway if the planned regeneration can create a significant new draw to the town centre.*
- *Ashby is a ‘jewel’ but still retains a low profile.*
- *Many of the other interesting villages could play a more effective role as attractions in their own right.*

Accommodation. An accommodation needs study was carried out for the Forest in 2008[5]. The overview of the current accommodation product is summarised below.

Table AI.1: Overview of accommodation establishments

	Serviced Accommodation	Self Catering	Camping and caravan sites
Establishments	77	26	12
Rooms (units)	1202	48	Touring pitches - 163
Bedspaces	1904	192	-

[4] Marston’s brewery does pre-booked tours only. Claymills Pumping station is a small industrial heritage attraction on the edge of town.

[5] Accommodation Needs Assessment for The National Forest, The Tourism Business, 2008

Table AI.2: Size of serviced accommodation

Over 50 rooms	3
21-50 rooms	12
11-20 rooms	6
Under 10 rooms	56

Source: Accommodation Needs for The National Forest, The Tourism Business, 2008

The major hotels servicing TNF are, with a few exceptions, located just outside the area e.g. Tamworth Ramada, Ramada Newton Park and the group of hotels around East Midlands airport. Within the Forest there are the two large spa hotels at Springs and Hoar Cross on the edge of the Forest along with 6 branded budget hotels around Burton and on the A38, A42 and M1. The Youth Hostel is an important new facility, built to a high environmental standard and closely associated with the Forest, which opened in 2008 with 83 beds in 30 rooms. There is a proposal to build a new four star hotel as part of the proposed FA National Football Centre just west of Burton.

Otherwise the serviced accommodation is made up of standard 2/3* hotels – and a growing number of small serviced accommodation facilities. These are mainly B&Bs and pub accommodation dotted throughout the villages. Only a few hotels are listed in the AA guide:

- Burton – Three Queens, Ramada Newton Park, Riverside
- Barton – Travelodge
- Ashby – Royal, Premier Inn
- Coalville – Charnwood Arms Hotel

Table AI.3: The hotels of the Forest

Hotels in TNF	**Location**	**Rooms**
Hoar Cross Health Spa	Near Yoxall	90
Champneys Springs Health Spa	Near Measham	89
Express by Holiday Inn	Burton-upon-Trent	287
Travelodge Burton South	Burton-upon-Trent	40
Premier Inn Bretby Conference Ctr	Burton-upon-Trent	39
Three Queens Hotel	Burton-upon-Trent	38
The Stanhope Arms	Burton-upon-Trent	25
Riverside Hotel	Burton-upon-Trent	22
Travelodge Burton North	Burton-upon-Trent	20
Premier Travel Inn	Ashby-de-la-Zouch	40
Royal Hotel	Ashby-de-la-Zouch	32
Fallen Knight Hotel	Ashby-de-la-Zouch	24
Charnwood Arms	Coalville	35
Hermitage Park Hotel	Coalville	25
Travelodge	Markfield	40
Field Head Hotel	Markfield	28
Claymar Hotel	Alrewas	20
Hotels just outside TNF		
Thistle	East Midlands Airport	
The Priest House	East Midlands Airport	
Express by Holiday Inn	East Midlands Airport	
Novotel	East Midlands Airport	
Hilton	East Midlands Airport	
Premier Inn	Fradley	
Etap	Willington	
Ramada Jarvis	Appleby Magna	
Ramada Newton Park	Newton Solney	

Menzies Mickelover Court	Near Derby	
Yew Lodge	Kegworth	
Days Inn	Donington	

Source: The Tourism Company

There are few self catering properties which is a particular concern for a forest destination. There have been some recent developments; Rosliston Forestry Centre has opened 6 forest cabins which are performing well and a new development of second home cabins has opened at Overseal. A new caravan and camping site was opened adjacent to the youth hostel by the Camping and Caravan Club. There has been growth in the number of planning applications for self-catering accommodation in and around TNF. Various self-catering schemes are in the pipeline including Barton Marina and in the Heart of the Forest area.

The accommodation study makes the following recommendations:

- New accommodation capacity needs to come on stream, probably between 3% and 6% per annum over the next five years.
- The NFC should continue to promote inspected-only accommodation and seek to grow the number of quality-graded establishments that can be promoted in the future.
- As a public resource, TNF should offer a good range of accessible accommodation for all segments of the population.
- Future accommodation development in TNF should fit with the theme of the Forest as an environmentally sensitive and important area.

Key Issues:

- *Most large hotels are on the periphery of the Forest; there is no major hotel 'of the Forest'.*
- *More good quality, accredited, serviced accommodation is required.*
- *There is a particular lack of self catering accommodation across the forest but there are schemes in the pipeline.*
- *The new Youth Hostel is leading the way in terms of Forest-related accommodation and environmentally responsible tourism development.*

Food and Drink. There are five restaurants in or near the Forest which have AA Rosettes:

- The Bay Tree, Melbourne
- The Grill Room at the Three Queens Hotel, Burton
- The Queens Head, Belton
- Donington Manor Hotel
- The Priest House on the River, Donington

The area produces a range of good quality meat and cheese products[6] and is famous for brewing. Local produce is available through a number of delicatessens, farmers markets, farm shops and a few restaurants. Local beers can be sampled at a number of pubs across the Forest. Sealwood online farmers market can deliver produce direct to local accommodation. A Food Fair is planned for 2010.

All the main Forest attractions have cafes – Conkers, the Youth Hostel, NMA, Rosliston Forestry Centre, Snibston and Calke Abbey – some of which promote local, seasonal food e.g. Calke.

[6] A National Forest Food Guide is available

Key Issues:
- *There are few good restaurants in the Forest.*
- *There is good quality local produce which could be more strongly promoted for the benefit of producers and add local distinctiveness to the destination.*

Attractions. There are over 100 attractions located in and around the Forest offering a range of experiences and facilities. These include:
- The five major Forest attractions at Conkers, Rosliston, NMA and Calke Abbey/Staunton Harold.
- A number of important attractions on the periphery of TNF including Bosworth Battlefield and Line, Draycott Manor, Twyford Zoo, Lichfield Cathedral.
- Under this group there is a range of small museums and heritage centres, woodland attractions, activity centres, craft shops and galleries, historic houses, country parks, animal attractions, and visitor centres.

Table AI.4: Main attractions and visitor numbers (2007/8)

In the Forest	**Visitor numbers**
Conkers	218000
Rosliston Forestry Centre	196000
National Memorial Arboretum	130000
Calke Abbey (House and gardens only)	127000
Snibston, Coalville	90000
Watermead Country Park	60000
Sharpes Pottery Museum	50700
Swadlincote Ski Centre	50000
Donington le Heath Manor House	23200
Ashby Castle	12000
Ashby Museum	6000
Moira Furnace	n/a
Claymills Pumping Station, Burton	3500
Melbourne Hall	n/a
Grace Dieu Priory	3500
National Forest Maize Maze	20000
Around the Forest	
Twycross Zoo	500000
Drayton Manor	c1000000
Battlefield Line	21000
Bosworth Battlefield Heritage Centre	7300
Castle Donington Museum	1029
Tutbury Castle	80000[7]
Elvaston Castle	n/a
Sudbury Hall*	71000
Measham Museum	950
Charnwood Museum	50100
Donnington Grand Prix Collection	16000
Castle Donnington Museum	2000
East Midlands Airport Aeropark	11000[8]
Tropical Birdland	n/a

Source: Visits to Attractions 2007, Operator Survey, data from individual attractions
* In 2007/8, the Museum was closed for refurbishment and the Hall attracted 46,000 visits; however when fully open again in 2008/9, there were 71,000 visits to the Hall and 109,000 visits to the Museum.

[7] Includes weddings, functions etc
[8] Only adult visitors are counted. Real figure including children is likely to be double this.

The geographical spread of attractions throughout the Forest is reasonable, with most areas represented in some form or another. There is an important nucleus growing in and around the Heart of the Forest with Conkers, Moira Furnace and their associated planned developments supplemented by Rosliston and Ashby in close proximity.

However, there is a view that there should be some new attraction in both the Needwood and Charnwood areas i.e. gateway attractions for TNF. It is also a matter of concern that, since the closure of the Coors visitor centre, there is now no attraction in Burton.

In thematic terms, one notable gap is the lack of arts attractions, including a major gallery of some sort.

Results from the enterprise survey suggest that while all attractions are open in the peak months of July, August and September, and most are open in April, May and June, a significant proportion are closed during winter.

Key Issues:

- *There is a wide range of attractions across the Forest including some major facilities, supported by others just over the boundary.*
- *There is no over-riding need for more attractions but, ideally, some geographical and thematic gaps would be filled.*
- *There is a constant requirement to upgrade attractions, providing a high quality experience.*
- *More attractions should be persuaded to open all year.*

Walking and cycling. TNF provides an excellent backdrop for walking, cycling and riding. More than 400 woodlands are open to the public and there are 700 miles of paths and bridleways, and 30 miles of canal to be explored. Seventeen walking trails have already been created and are available to download from the NFC website including many all-ability trails:

- Seven short walks (between 3.3 and 6.5 miles)
- Seven medium (8.5 to 10 miles)
- Three long walks (including the first long distance route of 22 miles).

The walks are spread over the Forest. They are all circular routes, available as printed leaflets and also as free downloadable information, with details of car parking and access by public transport. In addition there are a variety of other local trails developed by local authorities and other organisations across the area. Last year saw the introduction of a National Forest Walking Festival. Plans are now in train to develop a long distance National Forest Trail through the Forest.

Although more limited, a variety of new routes are also promoted for cycling, horse riding and access for all. A new cycling route around Conkers has just opened and there are proposals for a major new family cycling centre at Hick's Lodge. Bike hire facilities are available at Moira Furnace, Ashby de la Zouch and Rosliston. Riding is available from a number of stables (see NFC guide).

Key Issues:

- *A large part of The National Forest is open access.*
- *A network of trails already exists and a long distance trail is being developed.*
- *There is scope to develop more cycling / riding routes.*

Other outdoor activities. A range of outdoor activities are available in the Forest, some of which benefit significantly from a woodland setting or having the forest as a backdrop[9]. Examples include water sports on the river Trent (rowing, canoeing, jet skiing, sailing and wind surfing), boating on the canal[10], sailing and fishing on the major reservoirs (Staunton Harold, Foremark, Thornton) and other water parks e.g. Branston although access is often restricted to club members. In addition, there is clay shooting, paintball, quad biking, archery, llama treks, four wheel driving, survival weekends, conservation holidays, craft courses, tank driving and Swandlincote Ski Centre. Further afield there are the motor racing tracks at Donnington and Mallory Park, and the snowcentre at Tamworth.

The robust and regenerating environment gives real opportunity for developing these kinds of activities which may not be able to go elsewhere. As more land and waterspace becomes available there is a real opportunity to develop these activities which together represent a USP for the Forest. The Central Rivers Initiative (CRI) will create a range of new water spaces for water sports, angling, walking, cycling, nature interest and passive recreation in the Trent Valley (Whitemoor Haye and Barton East). Other quarries and land restoration projects in the east offer other long-term opportunities. The re-opening of the Ashby Canal as far as Moira is another long-standing objective.

The Ashby Canal Restoration

Restoration of the Ashby Canal has begun between the current terminus at Snarestone and Measham. Leicestershire County Council is leading the project and has successfully applied for a Transport and Works Act order giving Government Authority to re-build the canal over this length. Work begun at Snarestone in February 2009 with construction of 60 metres of canal, a stopgate, stop planks, winding hole and 100m off line nature reserve at the current terminus of the Ashby Canal. The aim is then to work through to Ilott Wharf and eventually into Measham. The proposal is to route the canal past the old Measham Station. This attractive building will receive a new lease of life as a stopping point for canal boats and provide a permanent home for the Measham Museum with its local history displays and Measham Teapot collection. The long-term ambition is to continue the canal under the A42 and link up to the existing waterway at Moira.

Key Issues:

- *A range of outdoor activities is available within TNF.*
- *There is potential for improved access to water spaces, notably in the Trent Valley.*
- *The robust nature of the local environment with new areas becoming available means there is significant scope for further development.*

Events and festivals. There is a growing number of events and festivals which take place throughout the Forest. Some, such as The National Forest Walking Festival and National Forest Wood Fair and numerous guided walks etc are directly related to

[9] The NFC have created special guides for wildlife watching, woodland experiences, green getaways etc
[10] There are marinas at Barton, Shobnall, Willington (the large new Mercia Marina) and Sawley with proposals for new marinas at Streethayen and Measham.

the Forest itself, whereas others – Folk Festival, Melbourne Festival, Calke Summer Classics – are events which take place with the Forest as a backdrop.

The National Forest Walking Festival, organised by South Derbyshire DC, has grown from a local event to one which covers the whole Forest and is a good example of an event which started small and has built on opportunities as they have arisen.

The range of landscapes and facilities in and around the Forest offer scope for a calendar of events that would appeal to a wide range of audiences. In 2009 the British Orienteering Championships are taking place in the Forest which will bring people from across the country, the Burton Regatta will appeal to the rowing fraternity, and the British Motorcycle Grand Prix at Donnington brings 100,000 potential visitors to the Forest's doorstep. (The Formula 1 British Grand Prix at Donnington from 2010 will generate even more visitors.) In contrast, the historic properties such as Calke Abbey and Snibston organise music and other cultural events.

Promotion of events is via The National Forest website and specific activities on the part of each event organiser. There is an opportunity to increase National Forest branding of the events and reflect this in promotion.

Key Issues:

- *A number of events take place at attractions in the forest including a growing number of forest-related events and festivals.*
- *There is potential to develop more forest events and promote them to a wider audience helping to raise the profile of the Forest.*

Retail. Burton, as the main commercial centre, has a range of retail complexes and markets albeit with limited appeal for visitors. Ashby, however has a good range of independent and specialist shops. There are other retail centres of interest to visitors at Barton Marina, Staunton Harold and Moira Furnace along with many farm shops and individual outlets. All the main attractions have retail outlets with themed produce.

Key Issues:

- *There are various retail outlets in TNF but a limited range of special interest shops.*
- *There may be scope for more forest themed products, working in conjunction with the forestry sector.*

AI.1.4 Follow up

There is no formal follow-up with visitors after departure, however the NFC has a bi-annual newsletter 'Forest Scene' which is sent to a database of people who have signed up for it and distributed via the local TIC network and attractions. It has a print run of 19,000. The NFC also keeps a database of visitor enquiries which is co-ordinated with the three districts that are part of the 'National Forest and Beyond' campaign.

Key Issue:

- *There is a mechanism for follow-up with visitors via an annual newsletter. This could be exploited further.*

AI.2 The scale and nature of the visitor market

AI.2.1 The catchment population

There are 23 million people living within 2 hours drive of TNF[11]. This is an enormous potential market and covers all segments of the potential market i.e. target groups.

A market profile analysis was undertaken in 2002, looking at the market within 60 minutes of Conkers. The following groups had the largest representation:

- Wealthy achievers, suburban areas.
- Comfortable middle-agers, mature home owning areas.
- Skilled workers, home owning areas.
- New home owners, mature communities.
- Council estate residents, better-off homes.

The following groups had a proportionally higher representation than the UK average:

- Affluent executives, family areas.
- Well-off workers, family areas.
- Older people, less prosperous areas.
- Council estate residents, greatest hardship.
- People in multi-ethnic, low income areas.

This endorses the view that all segments and potential target groups are located with relatively easy access to the Forest.

AI.2.2 Volume and value of tourism in The National Forest[12]

In 2007, the Forest attracted 7.6 million visitors of which just 566,000 (7.5%) stayed overnight.

- 42% of staying visitors stayed in serviced accommodation, 55% with friends / relatives. Only 3% stayed in non-serviced accommodation. This is surprising for a destination of this nature and would point to a lack of supply of self catering facilities.
- There is a high level of repeat visits – 76% visit each year or more and only 8% were first time visitors.

In 2007, total tourism expenditure was £267.4 million, 73% of which was by day visitors. Tourism in the Forest supports 4,227 FTE jobs. (The average spend for day visitors is £32. Those staying in serviced accommodation spend £102 a day, non-serviced and VFR are much lower at £42 and £37 respectively.)

Although there are early benchmark figures, there has been a steady increase in tourist numbers to the Forest – from 6.8 million in 2003 to 7.6 million in 2007 representing growth of 12%. Day visits have grown faster than staying visits – 13% compared to 9% - over this period.

Similarly, visitor receipts have also grown since 2003 rising from £228.95 million to £267.42 in 2007, growth of 17%. However, this growth is driven entirely by the day visit market which grew 24% in the same period while receipts from staying visitors

[11] Based on AA routefinder timings from Burton.
[12] Data drawn largely from the STEAM model and QA Research

actually declined by 0.5%. Staying visitor receipts dropped 5% in 2006, but recovered slightly in 2007.

AI.2.3 Visitor Profiles

The vast majority of visitors to The National Forest are day visitors. In 2007 they numbered some 7.1 million (92.5% of all visitors) and accounted for 73% of expenditure.

Tourism is fairly evenly spread throughout the year, although overnight visitors are more seasonal and in particular, in the non-serviced sector where 36% come in Q2 and 43% in Q3.

The average length of stay is 2.2 days, although there are considerable differences between the sectors. The average length of stay for serviced accommodation is 1.6 days, VFR 2.4 days and non-serviced 6.6 days. Average length of stay has remained static since 2003, although length of stay for serviced accommodation has fallen slightly (from 1.9 days in 2003) and non-serviced has increased by over a day (from 5.5 days in 2003).

The QA research undertaken as part of the VIP work gives a valuable insight into who is coming to the Forest and the activities they undertake when there:

- Visitors tend to come from neighbouring areas including 22% from Derbyshire, 30% from Leicestershire, 13% from Staffordshire and 7% from Nottinghamshire.
- The majority of visitors come with others (only 6% came alone) and 65% of groups contained children under 16. The average party size was 4.
- The vast majority (c95%) of visitors come by car and over 60% travel under 20 miles. Approximately 12% travel over 50 miles.
- The most popular activities are taking a short walk (65%), visiting attractions (59%) and eating and drinking out (43%) followed by visiting woodlands (25%). Wildlife conservation and shopping were also popular.

Further information can be gleaned from the enterprise survey:

- Around 86% of visitors are domestic. This rises to 92% for those staying in self catering accommodation.
- Approximately 34% of all staying visitors are on business, 23% on short breaks, 18% on longer breaks and 21% on other leisure breaks (weddings etc). The proportions vary, however, between serviced and self catering.
- Nearly half (45%) of serviced accommodation guests are on business, compared to only 15% of self catering, while the majority of self catering guests are on short or long breaks (38% and 39% respectively). However, only 15% of serviced accommodation guests are on short breaks and 6% on longer breaks. Given that the vast majority of accommodation providers in the Forest are serviced, this shows the importance of the business and events, weddings markets compared to the holiday market.

Key Issues:
- *TNF has a vast, diverse catchment population to draw upon.*
- *Visitor numbers are growing with associated local income from tourism and jobs.*
- *Of the 7.6m visitors to TNF, only 92.5% are day visitors who account for 73% of tourism expenditure.*
- *Of the staying visitors, very few stay in self-catering accommodation so the average length of stay is short.*
- *Visitors arrive mostly by car, in small groups from the local area and the most popular leisure activity is walking.*
- *Most staying visitors are on leisure breaks of one sort or another but almost half are on business.*

AI.3 The performance of tourism businesses in the Forest

AI.3.1 Business trends

78% of respondents said that their business had increased (a little or significantly) over the past 5 years, and despite the current economic climate, 61% expect business to grow over the next 5 years. This shows a level of optimism and energy amongst the enterprises who are looking to grow volume and value of businesses in equal measure.

AI.3.2 Occupancy levels and turned down business

There is no official occupancy survey for TNF, however data from the enterprise survey suggests that annual occupancy for serviced accommodation is over 60%. Most of those who responded said that they are turning down business at some point during the year, although the amount ranged from very few bookings to around 500. The high levels of turned down business probably relate to major events taking place at Donnington. That said, most serviced accommodation businesses stated that they would like to see more business during the winter months and around half would like more during the summer months.

Self catering facilities reported that they were let for an average of 37 weeks a year and half were turning away business during the summer months. However, more business would be welcomed during the winter.

AI.3.3 Barriers to growth

Lack of physical capacity and finance are the main barriers to growth, followed by planning problems. The low profile of TNF as a visitor destination is also an important factor restricting growth. Lack of sufficient demand and staffing problems affected some businesses.

Plans for growth / improvement

Only 8% of respondents did not have any desire to grow their business and 70% already have specific plans to develop, extend or improve their business over the next 5 years. This includes some refurbishment for accommodation providers and expansion and increased opening of attractions.

Key Issues:

- *Businesses have performed well and there is a confidence in the sector with some noted constraints (capacity, finance and planning).*
- *Serviced accommodation is performing well, particularly given the number of small businesses.*
- *Self-catering accommodation is performing exceptionally well.*

AI.4 The organisation of tourism in the Forest

There are a number of different players in tourism within the Forest. They cover different areas and have different remits.

The **NFC** does not have a specific remit for tourism but has a Tourism Officer as part of the wider promotion of the woodland economy. This role is that of a facilitator, primarily co-ordinating the '**National Forest & Beyond'** partnership and marketing campaign which is funded by the three local authorities (South Derbyshire, North West Leicestershire and East Staffordshire). The NFC also co-ordinates and chairs a **Tourism Working Group** that considers more strategic issues. The Tourism Officer also attends meetings and sits on working groups of the DMPs and local tourism Boards (see below). All this is undertaken with minimal resources.

Public sector support for tourism is channelled through sub-regional **Destination Management Partnerships (DMPs).** Unfortunately there are three different DMPs covering TNF; Destination Staffordshire, The Peak District and Derbyshire and Leicestershire Promotions each promoting their own part of TNF. The latter appears to have the greatest interest and commitment to TNF as it covers the largest area. For example, short breaks are promoted in TNF by LP with a link from the NFC website. The DMPs are supported by the RDAs with contributions from the local authorities and other sources. They deliver a range of services in support of their relevant regional strategy. Their principle role is marketing but they also support product development (quality, information etc).

The six **District Local Authorities** covering TNF are involved to different degrees in tourism. Of the three main districts covering TNF, NW Leicestershire and South Derbyshire have pro-actively supported tourism development through The National Forest & Beyond Partnership and they provide support for new developments and events (Conkers, Moira, Rosliston, the TICs, TNF Walking Festival etc) and East Staffs is now supporting a major scheme at Uttoxeter. All three helped develop the NF brand and support the work of the DMPs and the three Leicestershire districts have all created local District Tourism Boards. Lichfield retains a dedicated pro-active tourism team and South Derbyshire is keen to take a more active role in support of its new economic development and quality of life agenda.

The three **County Councils** have delegated responsibility for direct tourism activity to their respective DMPs. However, they are still responsible for transport planning (including public transport, trails, parking, rights-of-way), countryside matters (including management of a number of country parks and related activities), heritage initiatives and cultural services (museums, galleries, theatres, leisure centres, events and other attractions including Snibston Discovery Park, Beacon Hill CP).

The **Regional Development Agencies (RDAs)**, in addition to their strategic role and funding of the DMPs, have provided direct support to various development projects in the past e.g. the Visitor Information Project and support TNF's tourism ambitions in principle. TWM however, as stated above, do not have rural tourism as a priority although they do support tourism under the RDPE with Enterprise Grants that are not available outside the West Midlands.

The **private sector** is involved in destination marketing campaigns (with the NFC and DMPs) but there is no mechanism at present for them to engage or be engaged with strategic direction of tourism in TNF.

Amongst the stakeholders, there is great admiration of what has already been achieved in the Forest. There is goodwill - and resources from many - for onward development of the Forest as a visitor destination.

Key Issues:

- *The NFC is the only body with a remit across the whole Forest. It has limited resources for tourism.*
- *The National Forest & Beyond Partnership, facilitated by the NFC, provides a vehicle for the three local authorities to come together to promote TNF.*
- *Other agencies including the six districts and 3 counties (via the DMPs) and the RDAs make additional contributions to tourism in their own areas to differing degrees.*
- *The sharing of resources via a partnership or body working for wider tourism objectives across the whole Forest would have the potential to be more efficient and have greater impact.*

APPENDIX II: CURRENT POLICY CONTEXT

Any consideration of TNF as a visitor destination needs to involve the broader public policy context within which it sits. Not only does this policy affect potential tourism development but the Forest was established to contribute to local regeneration, to enhance the environment, the community and the local economy. Tourism can assist in meeting these wider goals.

The policy context therefore involves both tourism strategy being followed by the relevant agencies and the broader planning and community development policy context for the local area. We consider these in turn.

AII.1 Local tourism policy

The over-arching policy context is provided by the tourism strategies of the two RDAs. The three DMPs do not prepare individual tourism policy or strategies but, rather, work within the framework of the regional strategies and set out their short-term action plans in corporate/business plans.

At regional level, there is clear support for tourism in TNF from East Midlands. The Vision for tourism in the Region[13] states that: *"The region will be famous for the quality of its rural destinations. Destinations like the Peak District, Sherwood Forest, The National Forest will be synonymous with quality in recreation, boasting world class facilities, accommodation, pubs and restaurants."* The strategy gives priority to:

- Supporting iconic brands
- Creating destinations
- Encouraging high value staying tourism
- Protecting the environment

TNF is referred to as one of the Region's iconic brands and is identified as a 'Special Project' that ticks the other priority boxes; an initiative *"that is expected to have a major impact on the region as a tourism destination, a destination where the greatest capability to grow tourism exists".*

The EMT Corporate Plan for 2008-11[14] has three strategic objectives that all relate to the NF:

- Increase the current numbers of visitors to the region and their levels of expenditure through marketing and sales.
- Improve the competitiveness, productivity and quality of the offer for all types of visitors to the region.
- Plan and facilitate the investment needed to reinvigorate the region's tourism and visitor offer.

Tourism West Midlands, however, has different priorities. Here the focus is on business tourism, culture, food/drink and events. The Vision for the West Midlands is *"To be a global visitor destination where people, business and culture choose to connect"[15].* The clear bias is to urban tourism. There are references to the beautiful

[13] The East Midlands Tourism Strategy 2003 - 2010
[14] Building the Visitor Economy, 2008-2011, East Midlands Tourism
[15] West Midlands Visitor Economy Strategy, March 2008

countryside but *"it is not unique"*. There are, however, sub-regional priorities that the Forest could relate to including:

- Encouraging small meeting venues to invest and market collaboratively
- Raising the profile of shire towns
- Realising the potential of events that reinforce local distinctiveness
- To develop and use local food and drink as a focus for marketing

And there is over-arching support for sustainable tourism.

Key Issue:

- *The RDAs provide the over-arching tourism policy context. The East Midlands is very supportive of TNF; the West Midlands has contributed to local tourism infrastructure but does not currently prioritise rural tourism.*

The three DMPs have different remits and commitments but responsibilities include marketing, sales and PR (including the DMS), some aspects of product development (advice on, and lobbying for, tourism infrastructure, product packaging, business and skills support schemes, quality improvement and accreditation etc), some monitoring and research and visitor services (information, TICs etc). More crucially, the three DMPs have different priorities with regards to TNF:

- Leicester Shire Promotions (LP) has three priorities; marketing and sales, quality improvements and infrastructure development. It features the Forest strongly in promotional material *"Natural beauty: the Great Outdoors in Leicestershire"*; it is one of two key brands along with Leicester City. LP is deeply committed to TNF through its involvement with the tourism boards of North West Leicestershire, Charnwood and Hinckley & Bosworth. It takes an active role in all aspects of tourism development and marketing in the Forest. *"The ambition will be to invest significant resource behind the development of these brands* (Leicester and TNF) *and position them as exciting, complimentary yet contrasting new visitor destinations. Both of these products have potential to grow in significance of the next three years and be delivering significant bednights and return on investment by the end of that period (subject to sufficient investment.)"*[16]

- Visit Peak District and Derbyshire works on the basis of 'attract and disperse' visitors from the Peak District. TNF is seen as a maturing destination of great promise but not yet a lead brand. *"Our vision for the Peak District & Derbyshire is for it to become one of the UK's top tourism destinations. We want to be recognised as a world leading landscape including the Peak District, National Forest and wider countryside offering inspiring scenery, access for all and international resources for outdoor recreation, fitness, health and spiritual rejuvenation."*[17] The Forest is identified as a 'slipstream brand' and currently appears in the wider promotion of the county under relevant themes e.g. walking.

- Destination Staffordshire features TNF but also sees it more as a maturing destination, one of a number of discrete attractions which feature under three themes for the domestic consumer (thrills, culture and nature). They are keen to build up the nature theme and so TNF has a potentially important role to play in this respect[18].

[16] Leicestershire Promotions Corporate Plan, 2008-2011
[17] Visit Peak District and Derbyshire Business Plan, 2007 - 2010
[18] Destination Staffordshire Business Plan 2008 - 2011

The County Economic Partnerships can allocate funds to projects which are expected to deliver on local Regeneration Strategies. This can include tourism e.g. Derby and Derbyshire EP supported the development of Swadlincote TIC. The future role of DMPs and their relationship to the sub regional economic partnerships is currently evolving.

Key Issues:

- *DMPs offer a range of services to TNF at county level, principally destination marketing but also information services (via their DMSs), research and aspects of product development including business support, quality advice.*
- *TNF is represented by three different DMPs, which is not ideal.*
- *Leicestershire Promotions gives a higher profile to the Forest than the other two although Destination Staffordshire and Visit Peak District and Derbyshire identify the long-term potential of TNF.*

The District authorities within TNF are generally very supportive of the Forest and its tourism potential but have different approaches to tourism:

- North West Leicestershire has traditionally taken a pro-active role towards tourism and the Forest. Besides its involvement with The National Forest & Beyond partnership, it supports Ashby TIC and other tourism facilities. Tourism is identified as a key sector with the potential to be a key growth sector of the local economy, based on The National Forest[19]. The Council has allied itself totally with the image of the Forest. Its strapline is *"At the Heart of the Forest".* The ED Strategy has an objective, *'To maximise the contribution of National Forest-related tourism to the economy of North West Leicestershire'.* It states that more investment is needed – and will be supported - in accommodation and the development of additional attractions, including the local cultural resource and the Ashby canal.

- South Derbyshire now takes an unusually bullish line on tourism and recreation – given that it is not a statutory requirement - and is keen to take a more pro-active role in its development and promotion e.g. it is an active partner in the Rosliston Forestry Centre and funds the local TIC specifically to support TNF as a destination. SDDC co-funds and takes a leading role in The National Forest & Beyond Partnership activities, helping to reduce pressure on the NFC staff. It has identified a number of ambitions in its economic development strategy, two of which relate to tourism. Ambition 3 is *"developing tourism and the woodland economy, maximising the potential of TNF to address rural issues"* and Ambition 7 is *"continuing the revival of Swadlincote town centre as a service centre and focus for the community and visitors"* (Ambition 7)[20]. TNF is seen as the catalyst for tourism and a vehicle to satisfy a number of their cross-cutting objectives, particularly active and quality lifestyles for the expanding population that is planned for the District along with support for rural businesses. The LA supports 'Get Active in the Forest', a programme of activities to encourage outdoor activity.

- East Staffordshire (co-funder of The National Forest & Beyond partnership) seeks to create a vibrant and modern urban centre in Burton, stimulated by its growth point status, *"to develop the tourism potential of the Borough"* – particularly in the rural areas - as part of a diverse, flexible and high growth economy[21]. *"Tourism is*

[19] North West Leicestershire District Council Economic Strategy, 2007
[20] South Derbyshire Economic Development Strategy 2008-2012
[21] East Staffs Economic Regeneration Strategy 2007-2012

a growing sector and rural East Staffordshire is well placed to capitalise on this trend. The Strategy ensures that the tourism potential of our rural areas is managed in a sensitive manner to avoid any negative impact on our countryside."

- Lichfield District is currently preparing its own tourism strategy but is still working within the context of the South Staffs Visitor Economy Strategy whose Vision is to *"be known as the green and tranquil heart of the Midlands with a reputation for offering outstanding heritage and cultural activities and business tourism with an attractive and well-managed environment"*. The District is very pro-active in tourism and very keen to promote and work with TNF to develop outdoor activity tourism, principally through the gateway that is the National Memorial Arboretum and serviced from Lichfield.

- Charnwood Borough Council does not currently have a formal tourism policy. It hosts Charnwood Promotions, a local Tourism Board that has produced a 'Blueprint' Action Plan (2005-2007). The Council produces a guide and is organising a conference this year to consider tourism in the Borough, from which they hope to draw out a strategy for the future. TNF does not feature strongly in local print.

- Hinckley & Bosworth Borough Council has a low key tourism role with a focus on local leisure and the Bosworth area rather than tourism and the NF. Their 'Tourism Blueprint' does not refer to the Forest at all.

The three County Councils have delegated responsibility for tourism to their respective DMPs and so do not have tourism policies in their own right. They do however all have relevant policies relating to the enhancement of public transport, developing countryside amenities and cultural services that all impact on the visitor.

Key Issues:

- *All six district local authorities have an involvement in tourism.*
- *South Derbyshire, North West Leicestershire and Lichfield District are particularly committed and pro-active towards tourism in TNF.*
- *The three county councils support tourism indirectly through their commitment to the DMPs, public transport, countryside facilities and services, cultural facilities and services including access facilities and tourist attractions in TNF.*

AII.2 Local planning policy[22]

There is a well-established planning policy framework for TNF, with the Forest written in to national planning policy statements (PPS7 and MP7 best practice guidance); Regional Spatial Strategies for the East and West Midlands; and emerging Local Development Frameworks (LDF) covering the six districts/boroughs and mineral/waste disposal issues relevant to the area.

These planning policies are conceived to support the Forest's creation and to help achieve appropriate Forest-related development, particularly related to leisure and tourism, rural diversification, the woodland economy and restoration of mineral worked and waste disposal sites to Forest uses. This planning approach is endorsed in other policies e.g:

[22] Adapted from a paper by Simon Evans, NFC

- *“It is important to ensure that the rural potential of East Staffordshire is maximised through supportive planning policies”* (East Staffs Economic Development Strategy)
- *“Support appropriate development for employment uses in rural areas through the planning process”* (S Derbys Economic Development Strategy)
- *“There is need to support quality tourism projects which sit within The National Forest theme”…“The recent Department of Communities and Local Government good practice guide suggests that the planning system can take a more proactive and positive role in facilitating and promoting good quality tourist-related development…. Consideration will be given to the need for a Tourism Development Plan Document or Supplementary Planning Document in the review of the Local Development Scheme for North West Leicestershire.* (NW Leicestershire Economic Development Strategy)

Notwithstanding the above, there is a perception, voiced to us, that the contextual ‘supportive’ planning policies are not being reflected in development control. As stated in the NW Leicestershire strategy, there is a need to address tourism issues in the Core Strategy of the LDFs.

Since 1990 the Forest’s population has grown from 190,000 to 200,000 residents. This steady rate of growth is set to increase significantly, as in 2007 the Government announced that two new Growth Points (Burton upon Trent and East Staffordshire in the West Midlands and the Three Cities and Three Counties in the East Midlands) will be developed through to 2026. Both of these will affect the Forest area, with 32,800 houses currently planned in the Forest (12,000 houses in Burton upon Trent, 8,800 houses in Swadlincote and 12,000 in Coalville).

This level of growth could see the Forest’s population rise by around 70,000 people by 2026 or more, subject to current reviews of future provision. Added to housing growth there will also be a need for associated infrastructure such as new employment sites, roads and schools for a younger and more diverse population. The gross ‘footprint’ of new development being proposed could result in an area the size of Swadlincote being added to the Forest map by 2026.

TNF has been successful in securing 1,200ha of green infrastructure since 1991 through the planning system, including development-related planting, mineral site restoration and derelict land reclamation to Forest-related uses. Green infrastructure will be increasingly important in planning for new growth associated with the Growth Points.

- At a strategic level the Forest as a whole will form a cross-regional, ‘green lung’ at the heart of the two Growth Point proposals. The Forest is increasingly likely to be used as a major recreation area by people from surrounding towns and cities as well as by local residents.

- At a local level new green infrastructure must also form an integral part of individual sustainable urban extensions, to meet the day to day needs of new residents. It will be important to plan local green infrastructure to create effective green links to the wider Forest environment and to the urban centres of which they will form a part.

For new built development, local authorities support the NF Strategy objective of securing development-related woodland planting and landscaping. For housing sites over 0.5ha and commercial developments over 1ha, 20% of the footprint of the development is sought for Forest-related green infrastructure. (Green infrastructure has always been ‘read’ widely in the Forest and can include new woodland planting, other wildlife habitats, parkland, recreation areas, incorporation of heritage assets and the creation of new public access areas and routes.)

The NFC also thinks that there would be merit in local authorities identifying strategic green infrastructure zones beyond the growth areas identified for each town in the Forest. These would be priority areas for more extensive, strategic green infrastructure. They would help to ensure the continued separation of the main towns, as well as providing an attractive ‘green’ setting for the Forest’s main settlements and creating strong links with the wider National Forest environment.

LDFs are still in preparation but it is acknowledged that an important balance needs to be struck between development and the very resource that the Forest is creating – particularly its appeal as a growing resource for leisure and tourism. It will also be essential that new growth does not damage existing environmental assets.

Key Issues:
- *Planning policy towards tourism in TNF is positive but there is some concern about the how tourism projects are dealt with in development control.*
- *TNF is to accommodate significant growth over the next 20 years, growth that needs to be planned carefully and which should offer opportunities for significant environmental improvement and investment in recreation.*

AII.3 Sustainability and other cross-cutting themes

AII.3.1 Sustainability

Sustainable development has been the guiding principle of the creation of TNF since 1993*. “It is not one objective amongst many but rather the core of our mission to create a multipurpose forest for the nation, demonstrating social, environmental and economic benefits.”*[23]

The NFC, local authorities and stakeholders all share the common objective of sustainable (tourism) development. At a general level, the Forest is sequestering carbon and making a contribution to the reduction of greenhouse gases. Sustainable landscape change is being achieved through creating a range of habitats, through agricultural diversification and through reclamation of derelict and mineral worked land. Public transport in TNF remains as a major constraint requiring the attention of all local stakeholders.

There are ongoing challenges to reduce inequality in income and employment. TNFC and stakeholders have directly supported the growth of employment in tourism by developing TNF as a sustainable leisure and tourism destination. In more specific terms, TNFC is:
- Seeking to grow the proportion of overnight stays which have greater economic impact and reduce car travel.
- Promoting local food and drink to both visitors and the industry to encourage the culture of ‘keeping it local’.
- Promoting ‘green activity breaks’ to visitors.
- Encouraging sustainable construction and building management in tourism facilities e.g. the new Youth Hostel at Moira.

[23] The National Forest: An exemplar of sustainable development, TNFC, 2007

- Addressing transport issues where it can i.e. influencing policy and providing alternatives to car use within the area (a network of walking and cycling trails and promoting the use of public transport to access visitor attractions).

AII.3.2 Other cross-cutting themes

The three primary District Councils in the Forest (NWLDC, SDDC and ESBC) all have a number of other cross-cutting policy objectives to which tourism can contribute or which should pay heed. In summary these are policies to encourage:

- Local prosperity and employment.
- Strong and inclusive communities.
- Engagement with children and young adults, closer working with schools.
- Safer communities.
- More opportunities and greater participation in healthy, physical activities.
- The creation of a sustainable environment.
- Cultural development.

The tourism and recreation facilities in TNF are already contributing to these agenda. The vast majority of respondents to local research[24] felt that TNF had greatly benefited their communities. For example, TNF has:

- Made communities more attractive and sociable places to live.
- Created a better business environment and more business opportunities.
- Created many more places to visit and things to do.
- Created better places for walking (and therefore more encouragement) to go walking and undertake other active pursuits.
- Brought more tourists into the area.
- Improved the facilities for children.
- Improved the local environment (trees, wildlife, open space, restored sites).
- Helped ameliorate the negative impacts of climate change[25].

Key Issues:

- *Sustainable development is a key principle for all stakeholders in TNF.*
- *Public transport remains as a notable constraint on local environmental credentials.*
- *Tourism stakeholders are also committed to sustainability in the sector.*
- *Tourism currently supports a number of other local cross-cutting policies (safer communities, more active lifestyle etc) and will continue to, into the future.*

[24] Community perceptions of The National Forest, NFC, 2008 and Growing places: A study of social change in The National Forest, Lancaster University, 2006
[25] Forest Creation and climate change: The National Forest Company's position, 2007

APPENDIX III: DRIVERS OF CHANGE

AIII.1 External drivers of change

AIII.1.1 Economic prospects

The global economy has been in turmoil for the last year and most of the western world is now in recession. Oil prices, exchange rates, interest rates, credit availability and employment prospects have all varied enormously and the future is a total unknown.

Britain is currently in its first recession since 1991. The UK economy shrank by 0.7% in the third quarter by a further 1.5% in the last three months of 2008 – the biggest decline since mid 1980. Corporate news is also largely bleak. The services sector, which had been the main driver of growth in the economy for years, saw its sharpest drop in activity since 1979 at 0.9%. Household spending posted a 0.7% decline in the fourth quarter of 2008 while government spending, which rose by 1.5%, was one of few bright spots. There is uncertainty over the efficacy of political/fiscal plans.

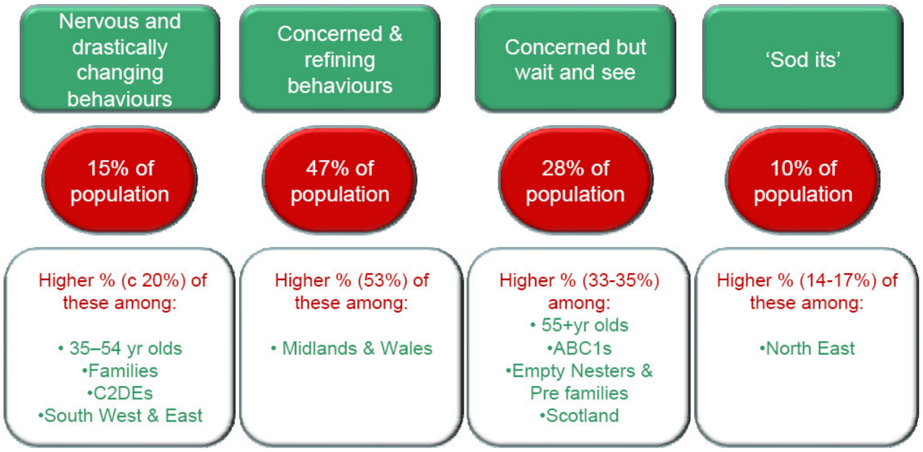
This global economic downturn has impacted on UK tourism – although this has not necessarily been ubiquitous. Visit Britain commissioned research on the impact of the recession on domestic tourism[26].

*"The climate is very pessimistic re the economic downturn and its impact is being felt by over half the population – even higher among families and lower socio-economic groups. The majority of the population think the worst is yet to come and tend not to expect to see the light at the end of the tunnel for over a year. Differing orientations emerge, from those already changing behaviour to the 'sod its' (*i.e those who will not be put off)*... although there is some demographic/regional variation across groups, they are more strongly defined by personal financial circumstances, which cut across demographics/regions."*

The research split the population into four broad segments according to their reaction to the economy (Figure AI.1). These groups are not strongly differentiated by demographic/ regional characteristics; more by personal circumstances which can cut across these, e.g. home ownership/ mortgage commitments, specific industries.

[26] The Economic Downturn and Domestic Tourism, Olive Insight for Visit Britain, Visit London and Enjoy England, 2008

Fig AI.1: Public reactions to the economy



Nine in ten (90%) of the population claim to be cutting back on spend as a result of the economic downturn (72% currently, 18% plan to in near future). Those most likely to be cutting back are families (80%) and those under 35 (77%). Those least likely to be cutting back are empty nesters and those aged over 55 years (65%).

Cut backs are most likely on low value items. Food, fuel, clothes and entertainment are cut before holidays and day trips. Holidays are no longer considered as 'luxuries' but holiday plans may change. 30% are not taking a holiday or are taking less time, 20% are spending less and 17% are changing plans. Those most nervous about the economic situation are cutting back most on holidays (74%) whereas only 15% of the 'sod-its' are doing so.

Other reports in the trade press (some anecdotal, some based on small surveys) suggest that people are still interested in travelling over the coming months, but they are spending more time searching, comparing and discussing holiday decisions and operators are responding with a range of special deals. Many consumers are opting for domestic travel destinations over those abroad and considering off-season travel. These assertions will only be proven when actual figures become available.

In the relatively recent past, notwithstanding cyclical changes, there was an underlying confidence in the basic fundamentals of the UK and western economies and that the economy would spring back from any negative event. Under these circumstances, disposable income and leisure spending should continue to grow for a large section of the potential market which will stimulate holiday-taking.

AIII.1.2 Demographic change

The population of the UK reached 61 million in mid-2007 (ONS estimates). UK population has grown by more than 20% since 1950 and is growing by more than 400,000 a year. At the recent growth rate of 0.6% a year, it will reach around 70 million by 2028.

In common with most other European countries, the UK has an ageing population. The proportion of people aged 65 and over is projected to increase from 16% in 2006 to 22% by 2031. This is an inevitable consequence of the lower mortality rates and the age structure of the population alive today, in particular the ageing of the large numbers of people born after the Second World War and during the 1960s baby boom. The percentage of the population aged under 16 has been declining since 1995 and, for the first time ever, has dropped below the percentage of the population of state pensionable age.

These baby boomers generally have more disposable income and a greater propensity to travel as they reach retirement age. As a group, they are used to travel and adventure, and they have raised their children to be similarly inclined – and neither the boomers nor their 'echo-boomer' children are ready to give up the freedom and adventure that travel brings. This group is able to travel even more now that they are 'empty nesters'. Baby boomers are looking for leisure travel that is experiential, educational, full of adventure and, most importantly, can provide an opportunity for 'togethering' – spending quality time with their multi-generational, disparate and, increasingly, blended families.

This affluent, active, early-retired group is a key market for the future as age is much less of a determinant of behaviour than before. Today's 60 and 70 year olds are active, healthy, and enquiring, and carry their values and interests with them as they age. Importantly, they have the time to take holidays and are more flexible in terms of when holidays can be taken.

There will also be a significant growth in single person households. By way of example, by 2016 these will account for over a third of all households in the UK. This will encourage the development of holidays that have an 'interest' focus and provide an opportunity to meet others in a convivial environment.

Other changes we can except to see will be:

- A more ethnically diverse population.
- More of the population will be classified as ABC1.
- Better educated and more mobile households.
- The increasing probability that many people will have to work longer to fund their retirement.

AIII.1.3 Social change

In much of the western world, new working patterns are emerging with a higher proportion of women working, the growth of two-earner households, shift working and contract employment. This means that many people are looking for more flexible holidays that can be fitted into busy lives. The constraint for many working people is time - not money.

Going on holiday is no longer just about picking a destination. Increasingly, it is about choosing a holiday which is customised to suit the individual consumer. People have become much more discerning and knowledgeable with regard to their holidays. They make their own arrangements, are more aware of what exists elsewhere and less loyal to particular destinations. They are keen to explore holiday opportunities within their own niche interests, whether that is bird-watching or learning to play an instrument. Trips for women, men, couples and grandparents are cropping up to cater for an ever-more fragmented consumer base with operators looking to differentiate themselves.

Holidays have become more than simple relaxation. A holiday has become another consumer item where people acquire prestige by choosing the 'right' destination whether it be for an annual holiday or a destination wedding. This is driving people to look for new experiences. There is a growth in interest in health and fitness, personal growth and development, enrichment rather than indulgence. This has stimulated a demand for adventure holidays, walking and cycling, and holidays with a special interest theme.

Authenticity is also important to travellers. Websites such as CouchSurfing.com and HospitalityClub.org have jumped in popularity in recent years. These websites strive to bring together travellers with locals willing to offer hospitality and socialising opportunities. Saving money is not the main goal of this trend. The core objective of this type of travel is the intercultural exchange opportunities.

Travel networking websites and activities are expected to grow steadily over the next five years. Companies of all sectors of the travel industry will benefit from:

- Enriching their offer and adding in destinations, products and packages that promote interaction with local cultures e.g. travel packages featuring participation in popular local festivals.
- Partnering with travel networking websites or creating new specialist sites to promote their offer. In particular, tourism promotion boards should promote the social aspects of their tourism product.

The WTM Global Report 2008 reveals a desire for social and environmental responsibility, social interaction, authentic travel experiences and fair trade practices.

AIII.1.4 Environmental awareness

Most surveys of visitors confirm the importance of an attractive and well managed environment/scenery as a critical factor in the choice of holiday destinations. There is also a small but fast growing market for 'green tourism' experiences i.e. nature and culture based holidays, using environmentally-friendly accommodation and transport that involve ever-closer interaction with the local environment and host community.

At a global level, concern about climate change and sustainable living is impacting upon the tourism industry in a big way. Tourism is under the spotlight as it is entwined with travel.

The growing awareness and concern about environmental issues means that more notice is taken of the carbon emissions involved in travel - and the environmental credentials of holiday destinations[27]. A Trip Advisor survey (2007) of more than 1,000 travellers worldwide found that 40% take environmentally-friendly tourism into consideration when making travel plans and 66% believe that environmentally-friendly measures in travel are making a difference:

- Nearly 25% believe that air travel should be avoided, whenever possible, to help preserve the environment.
- Just over a third (34%) said they would pay more to stay at an environmentally-friendly hotel and 9% would specifically seek out environmentally-friendly establishments.

When asked to specify how much they extra they would be prepared to pay for 'green' accommodation, 25% said they would pay a 5-10% premium, and 12% would pay a 10-20% premium.

[27] See, for example, 'Leading the Challenge on Climate Change', WTTC, 2008, which highlights the need for action on accountability and responsibility; local community growth and capacity building; educating customers and stakeholders; the greening of supply chains; innovation, capital investment and infrastructure within the industry.

In addition, despite current economic concerns at present, there is some evidence that a similar approach is reflected in the supply side. In a recent survey by the Association of Corporate Travel Executives amongst members, it was found that:

- 61% of organisations now have a Corporate Social Responsibility charter.
- 27% of organisations prefer to do business with suppliers and partners with a CSR charter.
- 17% see environmentally sustainable travel as a high priority.
- Around 40% of respondents said they would consider their carbon emissions when planning business travel.

The Henley Centre identifies environmental impact as one of eight significant themes which could have an impact on domestic tourism by 2015[28].

AIII.1.5 Human conflict and natural disasters

Terrorist activity and other natural disasters can have a significant impact on tourism, particularly if travelling by air to a distant location. The actual impact of such action on visitor numbers diminishes with time since the last event and varies by distance to travel[29].

Personal safety at the destination (from crime and illness) is also a powerful factor in decision-making and domestic destinations have an advantage in this respect. By their nature, however, security issues and likely responses by tourists are difficult to predict.

AIII.1.6 Technological change

The internet has had a huge impact on the way people access information about tourism and make bookings, lowering distribution costs and making it possible for small enterprises to reach customers across the world. It has also made customers more price aware and shortened booking times. The growth of Web 2.0 technology has important implications for customer feedback, reviews and broadening the scope of ‘word of mouth’ marketing. In addition:

- Teleconferencing is growing in the wake of cutbacks on business travel.
- Yield management is now possible for most transport and accommodation bookings enabling higher profit margins.
- Tourism products (restaurant meals, flights and hotels) are now being sold by internet auctions to fill spaces e.g. priceyourmeal.com and priceline.com.
- Mobile technology means that travel and other information is now available to visitors while they are on the move and in the destination.

AIII.1.7 Transport

Over the last century the main technological driver in the tourism sector has been the development of new transport options; aircraft, rail and now cruise ships enabling large numbers to access a wide range of destinations at affordable prices.

Now the emphasis is on the stress of travel. Traffic congestion will get worse which may also result in an increase in travel costs, through plans for road pricing and other initiatives. This is critical for shorter holidays and breaks. As an antidote to this, ‘slow

[28] What is the Future of Domestic Tourism to 2015? Henley Centre for Enjoy England, 2005

[29] Evidence from September 11 suggests that long haul traffic was affected by both the concern for being far from home in time of trouble and the risk of travel.

travel' by public transport, on foot, by bike or canal boat may become an attractive proposition in its own right.

AIII.2 Recent tourism trends

AIII.2.1 The international tourism scene

World-wide tourism has shown strong and continuous growth over the past 30 years although growth in tourist arrivals slowed drastically in 2008 due to the unfavourable global economy[30]. Northern and Western Europe fared worst of all. In product terms, airlines, hotels, corporate meetings and incentive travel were worst affected. 2009 figures are expected to be flat at best and a few points down at worst. According to UNWTO, confidence is at *"rock bottom".*

However, it is important to stress that while there is great uncertainty about the present situation, there is a lot of contradictory information about – much of it exaggerated or alarmist. Reports do not take into account how resilient tourism has been in the past. Unlike major previous crises such as 9/11 or SARS, the current downturn does not impact on the desire to travel but rather affordability. Tourism has fared better than other economic sectors in the downturn.

AIII.2.2 UK tourism scene

Overseas tourism to the UK has shown significant growth in volume in recent years (+30% between 2000 and 2007). 2008 figures flattened out and the prognosis for 2009 is uncertain. While overseas tourism to the UK is set to grow slowly, the make up of overseas tourism is likely to change as more visitors from emerging markets such as China and India discover Britain.

Domestic tourism has been broadly static since 2000 and, up until recently, the prospects did not look promising for a significant change in this long-term trend. Sectors which were considered likely to do better than others were short breaks and business tourism. (Increased economic activity drives business tourism whilst a more scattered population stimulates VFR trips.) However, certainly in the short-term there is some emerging evidence that the domestic market may fare well this year (2009) as people re-adjust to the economic situation. This is certainly the case amongst the more budget-oriented products (e.g. holiday centres, caravan and camping) with many people trading down. Higher-end products may encourage more business with discounted rates (cf London hotel prices in early 2009) but this may not be sustainable in the long-term. Those who can maintain good value for money should perform well; the key issue is whether the quality of the experience is sufficient to retain any new won custom for the future.

AIII.3 Scenarios for tourism

It is very difficult to consider potential scenarios over a 20 year period, particularly in the light of the current economic climate but we draw out three possible, long-term scenarios for consideration in TNF:

1. Managed growth: What if…the internal and external drivers maintain the trends of the last 20 years.

[30] UNWTO Tourism Barometer, January 2009

2. Financial meltdown: What if…the recession really bites over the next decade or more and public and private sector resources become severely limited.
3. The environmental imperative: What if…there is a rapid escalation of concern over climate change and the state of the environment.

AIII.3.1 Managed growth

The recession turns out to be a short, sharp shock - the V-shaped recession. Bank rescue plans work, house prices stabilise as buyers come back and consumer and business confidence turns up. The broadly positive economic environment of the past 10-20 years or so returns, but with more responsible attitudes in place.

In the short-term i.e. up to five years, tourism in TNF will be characterised by:

- Product development as some new woodland is created and existing woodland matures and is managed well for access and recreation.
- Limited investment in new or existing attractions.
- Some new self-catering units come on stream but no new hotels.
- Static or very low growth in staying visits in the Forest. There is a slight shift from overseas to domestic holidays but there continues to (slower) growth in overseas holidays and some people cut back (fewer holidays).
- Length of stay reduces as people look to save without giving up their holidays.
- Day visits remain relatively flat nationally but demand for Forest related activities grows more rapidly as the Forest matures and participants are determined to maintain their outdoor active interests.
- The staying market becomes more local as people travel shorter distances.
- Visitors look increasingly for value and seek out high quality self-catering and budget brands. Holiday-makers look to save on secondary spend.

In the long-term up to 2028, tourism growth reverts to recent past trends:

- World tourism expands at 4% but Britain continues to lose market share.
- Overseas arrivals continue to grow but any gains in domestic tourism from the recession fall away as consumers revert to foreign destinations.
- Day visits grow as the local population expands and adjacent conurbations seek new areas of outdoor activity.
- Consumers continue to talk about environmental concern but there is little change to their travel patterns and/or lifestyles.

In TNF, the Forest matures along with its image as a destination. Some new facilities are developed in the mature landscape including a few new low key forest attractions and a self-catering village. Planning and public sector funding constraints restrict further development. The economy constrains efforts for a ‘greener way of life’. The day visitor market features many more local residents and younger people from nearby conurbations taking up the challenge of a more active lifestyle. The staying visitor market is dominated by empty nesters and older visitors. Families and younger visitors grow, but more slowly. Visitor numbers, value and jobs continue to grow at current rates. Tourism continues to be co-ordinated by the NFC in collaboration with existing stakeholders.

AIII.3.2 Financial meltdown

The current recession turns out to be far deeper than anticipated. Most major economies tip into depression. There are ten years of gloom as witnessed after the Japanese banking crisis. Policymakers run out of ideas. Inflation remains and unemployment hits 3 million. Properties lose 40% of their value. There are numerous company failures. Consumers lose confidence and struggle to repay their debts. The banking systems in many countries collapse, leading to widespread chaos. Sterling continues to lose value. The situation deteriorates; a new war in the Middle East pushes oil prices sky-high and there is a new drought in wheat-producing regions. Riots ensue and governments put soldiers on the streets to maintain order[31].

Tourism, like most sectors, faces major problems under this scenario:

- Private and public sector funding for tourism is drastically reduced.
- Although domestic tourism benefits from the poor exchange rate, consumers come to appreciate any holiday as a (rare) luxury.
- Staying with friends and relatives is substituted for commercial accommodation, caravan and camping and other self-catering forms become very popular.
- Day visits are kept short to save on travel costs.
- Local leisure activities become enormously important and popular as a means of relaxation.
- The crisis encourages greater cooperation amongst tourism stakeholders.
- It also requires commitment to, and innovation in, areas such as product development, marketing, distribution, training and monitoring.

TNF is affected as public sector investment in the Forest growth points and other TNF initiatives go onto hold. Private sector investment is minimal. However, the existing facilities generally perform relatively well in tourism terms because of the large catchment population which capitalises on the all-year round, freely accessible and simpler healthy pleasures of the outdoor recreation opportunities on its doorstep. Good budget accommodation, serviced and self-catering, local eating establishments and other services on the network of trails are particularly busy with young adults and families. Free events are promoted by local agencies to entertain local residents and attract more visitors from these same markets that are finding the economic pressures particularly difficult. The commercial difficulties encourage more stakeholders into co-operative action.

AIII.3.3 The environmental imperative

As climate change becomes ‘top of mind’, individuals and organisations start to adjust their behaviour to less damaging forms of consumption. The younger generation has an even keener sense of the precariousness of the planet. There is a real shift in appetite to leave a positive legacy.

- Government policy and corporate responsibility push companies to adopt best environmental practice in the development and management of their businesses.
- Financial imperatives force individual businesses and consumers to save on energy consumption, use local produce, minimise travel.
- Personal preferences dictate a market for healthy living and outdoor activity.

Great value is placed on natural experiences and ensuring their sustainability, not just by the companies and communities that depend on them, but also by visitors.

Again, TNF performs reasonably well as it offers an opportunity for accessible, healthy holidays in a special environment with a real sense of place. There is a notable increase in businesses participating in ‘green schemes’ of environmental

[31] Adapted from an article in the Guardian, 17 October 2008

management and sustainable construction methods and the use of local produce and local suppliers. The public sector reinforces this trend through stricter regulation and control on development. As a corollary, it invests heavily in improved public transport and the quality of the physical environment in urban and rural areas.

People travel less reflecting higher oil prices and the new concern for the environment. TNF benefits because of the large number of people on its doorstep. All target groups grow but there is a disproportionate growth amongst those seeking conservation holidays, including volunteering, passive recreation learning opportunities (art, nature, photography etc) and healthy active pursuits. Tourism operators in TNF adapt and offer creative new packages of activities in an attractive, safe, quiet setting. Staff and management training is taken very seriously and is reflected in business performance. They gain valuable points of differentiation in the face of declining consumer purchasing power. Consumers are willing to trade up for sustainability, and the best operators capitalise on this ‘conscientious consumption’.

APPENDIX IV: CONSULTEES

National Forest Company	
Sophie Churchill	Chief Executive
Susan Warren	Board Member responsible for Tourism
Penny Wilkinson	Tourism and Promotions Officer
Mike Dewsnap	Chief Officer, Corporate Services
Simon Evans	Chief officer, Land Use
Clive Keble	Chief Officer, Land and Project Development
Regional Development Agencies	
Ruth Hyde	East Midlands Tourism
Nigel Russell	West Midlands Tourism
Chris Lillie	West Midlands Tourism
Jo Jury	Advantage West Midlands
Destination Management Partnerships	
David James	Visit Peak District and Derbyshire
Helen Rydzyk	Visit Peak District and Derbyshire
Graeme Whitehead	Destination Staffordshire
Martin Peters	Leicestershire Promotions
David Friesner	Leicestershire Promotions
Janine Williams	Leicestershire Promotions
Local Authorities	
John Richardson	North West Leicestershire District Council
Kathryn Belfield	North West Leicestershire District Council
Andy O'Brien	East Staffordshire District Council
Mahmood Azam	East Staffordshire District Council
Dean Piper	East Staffordshire District Council
Stuart Batchelor	South Derbyshire District Council
Mike Roylance	South Derbyshire District Council
Kevin Mason	South Derbyshire District Council
Sylvia Wright	Charnwood Borough Council
Lizzie Thatcher	Lichfield District Council
Maureen Roberts	Lichfield District Council
Patricia Holthof	Lichfield District Council
Simon Jones	Hinckley & Bosworth Borough Council
Lindsay Orton	Hinckley & Bosworth Borough Council
Caroline Roffey	Hinckley & Bosworth Borough Council
Peter Williams	Leicestershire County Council
Andy Goode	Staffs County Council / Central Rivers Initiative
Claire O'Reilly	Derbyshire County Council
Other stakeholders	
Alan Dowell	Forestry Commission
Emma Stead	Savills (Duchy of Lancaster)
Mike Ballantyne	Heart of the Forest Foundation
Dominic Houston	Roger Tym (Consultants to HoFF)
Mike Stickland	Planning Solutions (Conkers)
Geoff Pursglove	Ashby Canal Restoration Project
Corinne Moss	Severn Trent Water
Debbie Chesterman	Rosliston Forestry Centre
Peter Moore	British Waterways
Helen Overton	National Memorial Arboretum
Peter Orgill	Snibston
Gary Fletcher	Forest Holidays
Stewart Alcock	National Trust (Calke Abbey)
Stephen LeMottee	National Trust (East Midlands Region)
Guy Corbett-Marshall	Staffordshire Wildlife Trust

APPENDIX V: TNF ENTERPRISE SURVEY RESULTS

Profile of respondents

Location

E Staffs	8	15.7%
S Derbyshire	22	43.1%
NW Leics	17	33.3%
Other	4	7.8%

In NF	28	54.9%
Not in NF	18	35.5%
D/K	5	9.8%

Type of enterprise

Serviced	16	31.4%
Self catering	11	21.6%
Attraction	18	35.3%
Other	6	11.8%

Serviced Accommodation

Type

Hotel	4	33.3%
B&B	5	41.7%
Farm B&B	1	8.3%
Guesthouse	1	8.3%
Youth Hostel	1	8.3%

No of bedrooms (1 to 50)

Under 10	7	
11-20	1	
21-30	2	
31-40	1	
41-50	1	
Over 50	0	

No of bedspaces (2 to 100)

Under 10	4	
11-20	2	
21-40	0	
41-60	1	
61-100	3	
Over 100	0	

Graded
Yes (9) 75% (3star – 4 – 40%; 4star – 6 – 60%)
No (3) 25%

Occupancy

Annual	64.13%
Weekday	61.67%
W/end	44.17%

Turning away business

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
W/d	66.7	33.3	66.7	33.3	66.7	100	66.7	66.7	33.3	33.3	33.3	33.3
W/e	33.3	0	33.3	33.3	33.3	66.7	33.3	0	0	0	0	0

Bookings lost
Range – 0 to 500 (NB 500 respondent was near Donington)
0-10 16.6%
11-49 16.6%
50 50%
500 16.6%
One only full when they have weddings

Months open
91.7% open all year
8.3% not open in Nov (NB only represents one respondent)

More business wanted

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
W/d	77.8	88.9	77.8	66.7	55.6	55.6	66.7	55.6	55.6	77.8	88.9	88.9
W/e	77.8	88.9	77.8	66.7	55.6	33.3	55.6	44.4	44.4	77.8	88.9	88.9

Guests
Overseas 17.82%
Domestic 82.18%

Short breaks 15.36%
Longer hols 6.36%
Other leisure 28.00%
Business 45.00%
Conference 5.27%

Self Catering

Type

Holiday cottages / cabins	4	66.7
Campsite	0	0
Holiday Park	1	16.7
Narrowboats	1	16.7

Units / pitches
2 units (2)
6 units (2)
10 units (1)
Ave no 5.3

Bedspaces
Under 15 x 2
16-30 x 2
31-40 x 2
Ave no 25

Graded
Yes 83.3% (5) – 60% 4 star, 40% 5 star
No 16.7 % (1)

Weeks let
From 6 to 47
Average 29 (34.75 if you don't count the 6)

Turning away business

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
0	25	25	0	25	50	25	50	50	25	0	0

Amount of lost business
Under 10 – 2
11 to 20 – 2

Months open
100% from March to October
83.3% Jan, Feb, Nov, Dec

Would like more business

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
40	60	80	80	80	60	40	40	40	60	40	40

Guests

Overseas	8.5%
Domestic	91.5%
Short breaks	38.33%
Longer breaks	39.17%
Other leisure	7.33%
Business	15.17%

Combined data for Accommodation

Guests

	Serviced	Self catering	All
Overseas	17.8	8.5	14.5
Domestic	82.2	91.5	85.5
Short breaks	15.4	38.3	23.5
Longer breaks	6.4	39.2	17.9
Other leisure	28.0	7.3	20.7
Business	45.0	15.2	34.5
Conferences	5.2	0	3.4

Attractions

Visitor numbers
Range from 100 to 750,000

Under 1000	1
Up to 5000	3
Up to 10000	1
Up to 50000	2
Up to 100k	1
Over 100k	2

Grading

VAQAS 1	8.3%
Code 3	25%
None 8	66.7%

Months open

July, August, September	100%
April, May, June	91.7%
Oct, Dec	83.3%
Jan, Feb, Mar, Nov	75%

Visitors

Overseas	4.3%
Domestic	95.7%
Local residents	69.25%
Day visits	18.67%
Staying in area	12.08%

A vision for the Forest

How important is the NF in attracting visitors?

Very important	38.2%
Quite important	32.4%
Neither important or not	14.7%
Not very important	8.8%
Not at all important	5.9%
Don't know	0

To what extent do you agree / disagree with the following statements?

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree	Don't know
Potential to grow business tourism	47.1	35.3	11.8	0	2.9	2.9
Potential to grow leisure tourism	50.0	41.2	8.8	0	0	0
Potential to attract more visitors to towns	44.1	35.3	17.6	2.9	0	0
Potential to attract more visitors to rural and villages	52.9	38.2	5.8	0	0	2.9
Will have negative impact on area	0	6.1	6.1	42.4	45.5	0
Needs more attractions	18.2	24.2	36.4	18.2	0	0
Needs more outdoor activities	11.8	52.9	26.5	8.8	0	0
Needs more hotel	3.0	33.3	36.4	12.1	6.1	9.1
Needs more B&B	9.1	33.3	30.3	6.1	9.1	12.1
Needs more Self catering	12.5	21.9	37.5	12.5	6.3	9.4
Needs more camping / caravan	6.1	27.3	36.4	12.1	3.1	15.2

To what extent are you currently taking action in …

	Yes	No	D/K	N/A
Encouraging less dependence on car use	40.0	50.0	0	10.0
Reducing energy use and waste	91.3	4.3	0	1.3
Making more use of local produce and supplies	87.0	1.3	0	8.7
Taking account of local community concerns	73.9	13.0	8.7	4.3

To what extent are you interested in increasing activity in …

	Yes	No	D/K	N/A
Encouraging less dependence on car use	57.9	31.6	5.3	5.3
Reducing energy use and waste	80.0	13.3	0	6.7
Making more use of local produce and supplies	86.7	6.7	0	6.7
Taking account of local community concerns	53.3	20.0	20.0	6.7

Business Environment

In the last 5 years has business …

Declined significantly	3.7%
Declined a little	3.7%
Stayed about the same	14.8%
Increased a little	51.9%
Increased significantly	25.9%

How do you expect business to change over next 5 years …

Decline significantly	0
Decline a little	10.7%
Stay about the same	26.8%
Increase a little	42.9%
Increase significantly	17.9%

Are you looking to grow your business in the future …

Grow value	60.7%
Grow volume	64.3%
Planning to retire / cease operating	0

What are the main barriers to growth …

No desire to grow	7.7%
Lack of physical capacity	38.5%
Staffing problems	19.2%
Planning problems	34.6%
Lack of capital / finance / ROI	38.5%
Lack of sufficient demand	19.2%
Low profile of TNF as visitor destination	26.9%
Other	15.4% (credit crunch, tenant farmers, volunteer org)

How would you like to improve your business in the future?

Do you have any plans to develop, extend or improve your business over next 5 years?

Yes	69.2%
No	30.8%

Do you have difficulties recruiting and retaining appropriate staff?

Very difficult	8.3%
Difficult	8.3%
Occasional problems	25.0%
No problems	45.8%
D/K	12.5%

Top 5 Priorities

1. Marketing, promotion, advertising, profile raising issues
2. Development of attractions and activities, especially linked up trails and walks
3. Transport infrastructure, better links especially by train
4. Organisational issues, management, partnership working
5. More overnight accommodation

Others:

- coherent planning framework between authorities
- access to investment support and funding
- more trees and woodland management issues
- high profile events to attract people
- sustainability, use of local resources etc
- sensitive development of urban areas
- themed packages
- focus on younger people as they will be the visitors of the future