

the **research** solution

The National Forest & Beyond

Campaign Evaluation



Final Report

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**NATIONAL FOREST & BEYOND
VISITOR GUIDE CAMPAIGN EVALUATION 2009**

CONTENTS

Executive Summary	i-iii
1.0 Introduction Brief and Methodology	1
1.01 Introduction	1
1.02 Objectives of the survey	1
1.03 Methodology	2
2.0 Origin of Visitors	4
2.01 Origin of visitors by media channel	5
3.0 Summary Findings about the Guide	6
3.01 Recollection of receipt of the guide	6
3.02 Prompted request of guide	6
3.03 Trip taken following receipt of the Guide	8
3.04 Taken a short break elsewhere	9
3.05 Reasons for short break elsewhere	10
3.06 Change of format to the 2011 Visitor Guide	10
4.0 Summary Findings about the visit to the National Forest	11
4.01 Influence of the guide	11
4.02 Main purpose of visit	12
4.03 Length of visit (nights)	13
4.04 Month of visit	15
4.05 Lead in time	16
4.06 Accommodation	18
4.06 Type of accommodation	18
4.07 Location of accommodation	19
4.08 Importance of quality grading of accommodation	19
4.09 Use of the visitor guide to find individual websites	20
4.10 Use accommodation guide to assist booking	21
4.11 Travelling companion and group structure	22
4.12 Age profile of visitors to the National Forest	23

5.0	Summary Findings of all Respondents	24
5.01	Number of miles live from National Forest	24
5.02	Time since last visit to the National Forest	25
5.03	Type of previous visit to the National Forest	26
5.04	Access to the internet	27
5.05	Visited the National Forest Website	27
5.06	Online booking facility	28
5.07	Comments or suggestions about the Website	29
5.08	Comments or suggestions about the Guide	30
6.0	Expenditure/Party Size/Nights and Estimations of Campaign Impact	31
6.01	Domestic Expenditure generated by the Guide	31
6.02	Overnight Visitors Directly Influenced by Guide	31
6.03	Day Visits Who Came / Influence by the Guide	32
6.04	Visitors Intending to take a short break / influenced by the guide	34
6.05	Expenditure Summary	33
7.0	Conclusions	34
7.01	Review	34

Executive Summary

National Forest & Beyond Conversion Research at a Glance

In December 2009, The Research Solution (TRS) were commissioned by The National Forest Company to undertake a campaign evaluation based on their recent National Forest & Beyond Visitor Guide 2009. This report provides estimates of the impacts of the domestic visitor campaign using a self-completion questionnaire sent to a sample of the domestic database of original Guide enquirers. The impacts are then factored up in proportion to the overall database size.

The National Forest provided TRS with their customer database of those who requested a copy of their Visitor Guide, with some 8,754 domestic names and addresses retained.

Key findings

- After receipt of the guide 14% took a short break to The National Forest and 23% intended to make a visit within 12 months. 16% had made a day trip to the National Forest with a further 15% intending to make a day trip in the next year. The guide therefore led to 68% to take a trip to the Forest or intent to visit.
- The West Midlands accounted for 13% of visitors who had or intended to visit, with the East Midlands supplying 8%.
- Awareness and recollection of the guide was high with 93% of respondents recalling receipt of the guide.
- Competitor destinations included Wales, Chester, the New Forest, The Cotswolds, Norfolk, Oxford, Torquay and York
- 70% of respondents stated that the guide had influenced their decision to visit.
- The main purpose of visit by respondents who had visited / would be visiting the National Forest included; walking (56%), visiting woodlands (55%) and visiting a historic/heritage site (50%).

- The average length of stay for those that took a short break was 3.9 nights, much higher than in 2007 when the average length of stay for those who had taken a break was 2.6 nights.
- The busiest months are April - June.
- A quarter (25) had made the decision to visit 6 months in advance, lower than previous research undertaken in 2007.
- Non-Serviced accommodation is the most preferred type (54%) compared with 2007 when serviced accommodation was highest at 59%.
- 50% of respondents who had made a visit to the National Forest felt that accommodation ratings influenced their booking with 28% rating it “very important” and 22% “important”. 70% had used the guide to assist with their booking
- The average number of people per party visiting the Forest is 3.4 and 65% were over 45.
- The majority of visitors had or intended to visit with their spouse/partner (53%)
- More than half stated they had visited before.
- Almost half (49%) lived up to 100 miles from the National Forest.
- 67% (59% in 2007) have access to the Internet and 71% (49% in 2007) of these would use an online booking facility.

Overnight stays directly influenced by the guide generated £159,304 overnight visitor expenditure, 4,516 (bednights). Average spend per person per trip £148.161. Visitors intending to visit within 12 months could potentially generate £490,283 (17,031 bednights)

The total spent by those that have visited and intend to visit for a short break, that have been directly influenced by the guide, is therefore £649,323 (21,547 bednights).

In addition, the expenditure generated from those that took a day visit to The National Forest as a result of the campaign was £67,7404 (average spend per person per day £16.91).

Return on Investment from Campaign**Campaign costs**

Design, artwork and print	£17,418.00
Guide distribution	£2,822.00
Total advertising/promotion & production	£7,281.91
Total campaign cost	£27,521.91

The total generated from the campaign is £649,323, which gives a return on investment of 24:1 - or £24 to every £1 spent, which is well in excess of the East Midlands Tourism minimum of 13:1.

This research only looked at the responses to the promotional campaign for the 2009 guide and looks at those people that were directly influenced by the guide (i.e. were not intending to come anyway).

This research is based on the campaign responses of 8,754 enquiries. The remaining 34,246 guides from the 43,000 print run were distributed to potential visitors through Tourist Information Centres and major events across the country. The statistics in this research only includes a small percentage of the total print run.

It can therefore be assumed that if 80% of the sample surveyed in this report were influenced to visit, the expenditure generated by the whole campaign including the remaining 34,246 guides is significantly higher.

1.0 Introduction, Brief and Methodology

1.01 Introduction

In December 2009, The Research Solution (TRS) were commissioned by The National Forest Company to undertake a campaign evaluation based on their recent National Forest & Beyond Visitor Guide 2009. This report provides estimates of the impacts of the domestic visitor campaign using a self-completion questionnaire sent to a sample of the domestic database of original Guide enquirers. The impacts are then factored up in proportion to the overall database size.

The National Forest provided TRS with their customer database of those who requested a copy of their Visitor Guide, with some 8,754 domestic names and addresses retained.

1.02 Objectives of the Survey

In January 2010, The Research Solution mailed the survey questionnaire to a sample of 1,069 postal respondents who had requested the Guide. A further 896 respondents from the website campaign were also mailed requesting them to take part in the on-line survey. The aim of the survey was to ascertain answers to a number of questions about the Guide, and the level of response and visits generated to the area. In particular, the survey investigates the rate of conversion of people who were influenced by the Guide, and the level of trips, nights and spend generated has been estimated based on responses received.

The key elements required from the campaign evaluation survey were as follows. To determine:

- if the respondent chose to come to The National Forest and made a visit this season
- the influence of the Guide on the decision-making process
- how many people came and how long they spent in the area
- what accommodation was used and where did they stay
- how accommodation was booked
- what they did whilst in the area
- Use of the National Forest website
- how much did they spend;

The reason for carrying out such research covers multiple purposes – as a tool in best value assessment of the marketing function, based on how the customer evaluates the Guide; using existing professional unbiased methods of evaluation; confirming existing perceptions and

opening up new ideas by listening to the customer; making objective judgements. This summary report will be making independent objective statements from the findings.

1.03 Methodology

The Research Solution in consultation with the client made use of an existing survey structure used on previous campaign evaluations. TRS undertook the following:

- questionnaire design – in association with The National Forest
- provision of reply paid response envelopes to TRS
- data processing of postal questionnaires
- analysis of results – through the SNAP data analysis package
- interpretation of results – particularly by visit/ intention to visit
- production of a written report – covering methodology and results.

An incentive of £100 of vouchers was offered to encourage return of the questionnaires. 1,965 questionnaires were produced and mailed/emailed to the domestic names and addresses retained on The National Forest Visitor Guide request database. Although the National Forest has a large database totalling circa 43,000, only a proportion of the database was chosen by whether they had requested the National Forest Visitor Guide in 2009 and if eligible to be mailed under the Data Protection Act. Only those who stated that they would like to receive further information were mailed. All results are based upon those who responded to this survey.

By the closing date of the 12th February 2010, 332 or 17% had been returned.

The bullet points below indicate in detail the media channels for the National Forest Visitor Guide 2009.

- WTG - Where to Go 2009
- HGF - Holiday Guide Finder 2009
- PHC - Premier Holiday Collection
- UKHCII - UK holiday Collection II
- StaffG - Staffordshire Guide
- NFC/TNF - Enquiries to National Forest Company and The National Forest website
- Emails - enquires made via Sunday Observer, Sunday Telegraph magazine, The Times magazine, E-Blast

Due to the small sample sizes received for the NFC and TNF enquiries, Bitesize Britain, the Observer Magazine and the Times Magazine, results for these media channels are not shown in the following analysis.

The table below shows a breakdown of the media channels mailed and the percentages returned.

Media	Number Mailed to Domestic Enquirers	Returned	%
Where to go	490	110	33%
UK Holiday Collection	220	60	18%
Premier Holiday Collection	180	45	14%
E-Blast (email)	397	39	12%
Holiday Guide Finder	50	17	5%
Sunday Telegraph Magazine (email)	104	14	4%
Staffordshire Guide	50	12	2%
National Forest enquiries	37	10	3%
Times Magazine (email)	167	8	2%
Observer Magazine (email)	89	5	2%
Bitesize Britain	42	3	1%
Email (uncoded)	139	9	3%
Totals	1,965	332	99%

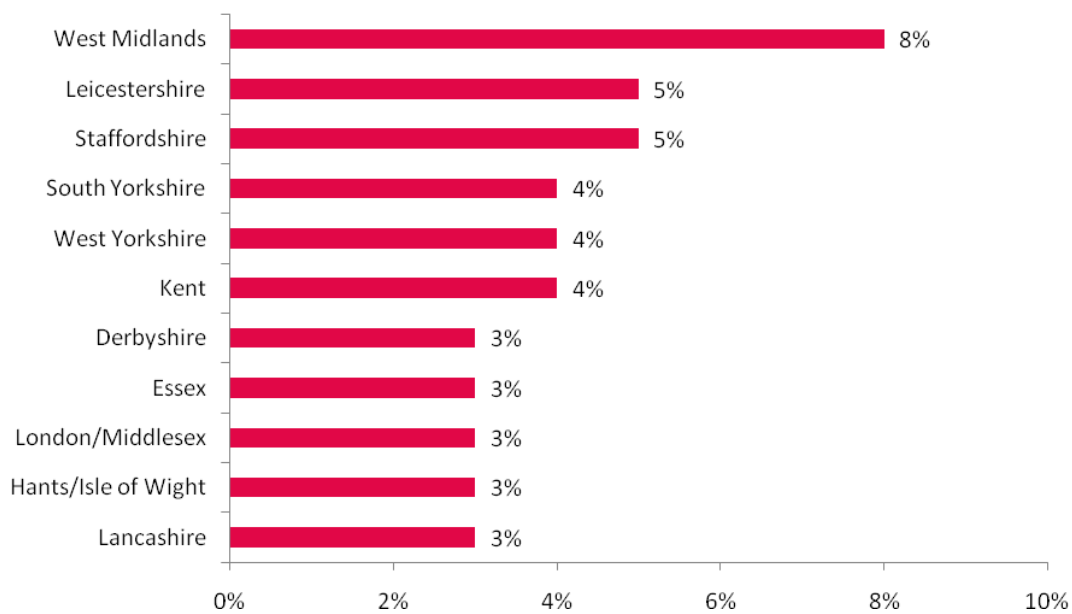
The breakdown of all respondents by enquiry source showed that 33% of questionnaire returns were from those who requested a Where to Go Guide. The second highest response was from those who had used the UK Holiday Collection Guide (18%).

2.0 Origin of Visitors

Respondents were given the option of supplying their names and addresses in order to take part in the prize draw.

As the chart below indicates, The County supplying the largest proportion of visitors was the West Midlands Metropolitan Area, with 8% of respondents originating from within the West Midlands County.

Figure 1: Origin of Visitor



Elsewhere across the country, 11% of visitors had originated from the North of England, including 4% respectively from South and West Yorkshire and 3% from Lancashire.

8% of respondents to the survey originated from the East Midlands, including 5% from Leicestershire and 3% from Derbyshire.

2.1 Origin of Visitor by Media Channel

The origins of respondents varied by media channel: Those who had requested a guide via the Where to Go media channel originated mainly from the East and West Midlands, including 10% from the West Midlands Metropolitan Area and 5% from Leicestershire.

12% respectively of respondents who requested a guide via the Holiday Guide Finder were from Staffordshire and South Yorkshire.

Premier Holiday Collection respondents originated mainly from London/Middlesex and South Wales (11% respectively) followed by 9% from The West Midlands Metropolitan Area and 7% respectively from Gloucestershire and Dorset/Poole/Bournemouth.

10% of respondents requesting a guide via UK Holiday Collection II came from West Yorkshire, followed by 8% from the West Midlands Metropolitan.

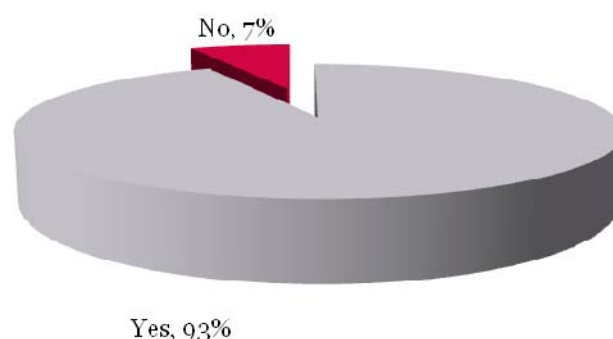
The origin of respondents who had requested a guide via E-Blast came from areas close by the National Forest with 11% from Leicestershire and 8% from Staffordshire.

3.0 Summary Findings about the Guide

3.01 Recollection of Receipt of Guide

Although most of the respondents who had requested a guide had been in possession of the Guide for many months, the majority (93%) still recalled receiving the brochure. Awareness and recollection of the Guide had seen an increase since this study was last carried out in 2007 when only 84% had recalled receiving the Guide. Increased marketing and awareness raising of the National Forest & Beyond could have had a significant impact on this.

Figure 2: Receipt of Guide



Similar results were witnessed for respondents that requested a guide via the Where to Go and Staffordshire Guide media channels; however, the other media channels had slightly varying results. Almost all (98%) of respondents who had requested a guide through the UK Holiday Collection Guide Enquiries had remembered receiving the guide compared to only 76% of respondents that requested a Guide via E-Blast. A full breakdown is shown in the table below.

	Overall	Where to Go	HGF	Premier Holiday Collection	UK Holiday Collection	E-Blast	Sunday Telegraph Magazine	Staffordshire Guide
Base	325	110	17	45	60	38	14	5
Yes	93%	95%	100%	100%	98%	76%	86%	92%
No	7%	5%	-	-	2%	24%	14%	8%

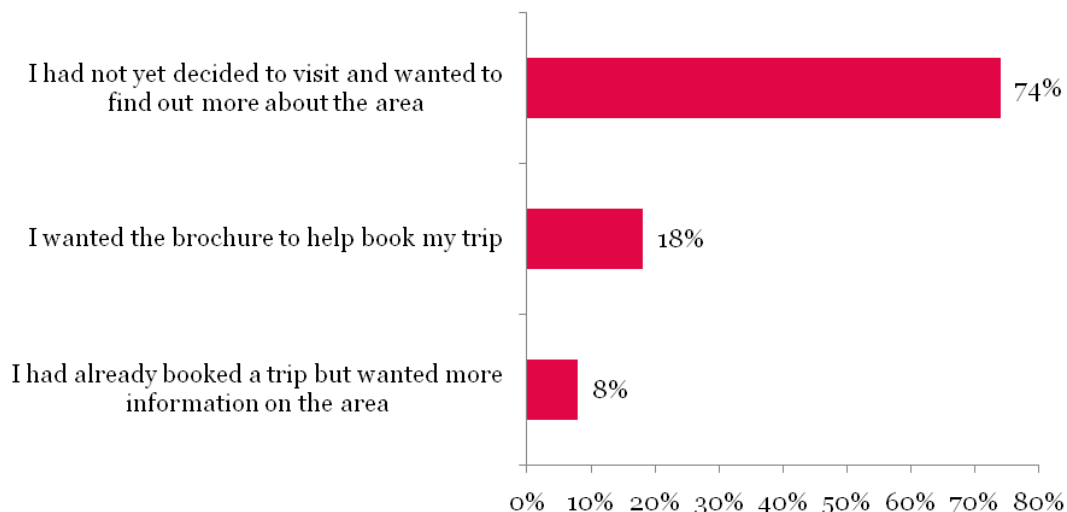
3.02 What Prompted Request of Guide

Almost three quarters (74%) of all respondents had not yet made a decision to visit the National Forest and Beyond and had requested the Guide to find out more about the area, whilst 18% of

respondents had requested the Guide to help them book their trip. Therefore, over nine out of ten (92%) respondents can be described as being **influenced** by the Guide.

A further 8% of respondents had already decided to visit the area but requested the brochure to assist them with booking their trip. Therefore, 8% of respondents had requested the brochure to **facilitate** their trip. The findings are presented in the figure below.

Figure 3: What prompted request of the Guide



There were similar results in responses from the different media groups with the exception of the Holiday Guide Finder and the Staffordshire Guide, where a higher percentage of visitors (29% and 25% respectively) stated they had already booked a trip but wanted more information on the area.

Table 3: What prompted request of Guide by Media Channel

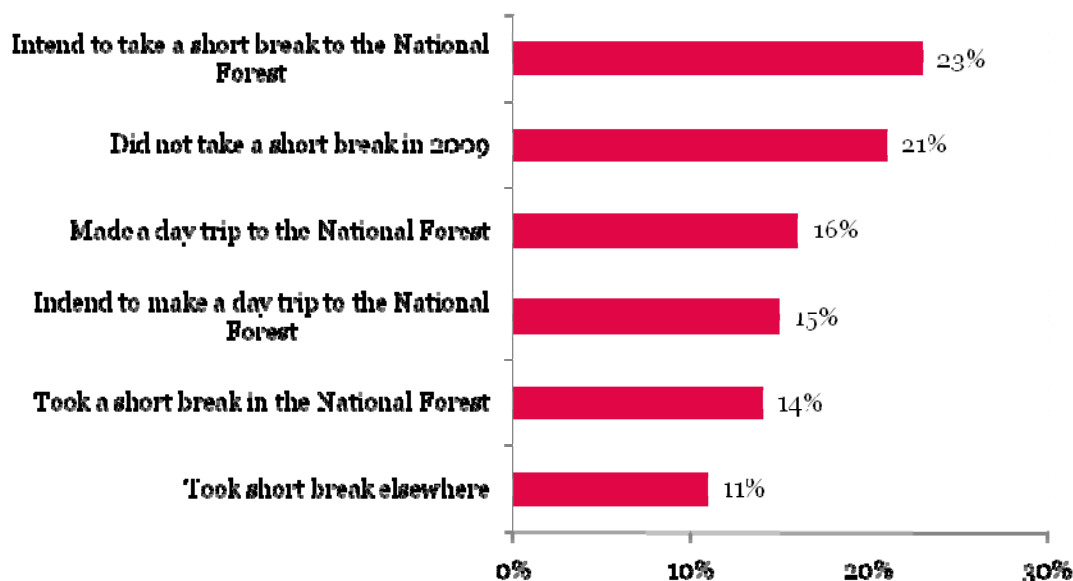
	Overall	Where to Go	HGF	Premier Holiday Collection	UK Holiday Collection	E-Blast	STM	Staffs Guide
Base	325	110	17	45	60	39	13	6
I had not yet decided to visit and wanted to find out more about the area	74%	83%	47%	73%	75%	67%	77%	50%
I wanted the brochure to help book my trip	18%	11%	24%	24%	20%	23%	15%	25%
I had already booked a trip but wanted more information on the area	8%	6%	29%	2%	5%	10%	8%	25%

3.03 Trip Taking Following Receipt of Guide

After respondents had received the Visitor Guide, 14% indicated that they had taken a short break in the National Forest & Beyond in 2009, with a further 16% stating they had made a day trip to the National Forest.

Just over one fifth (23%) of respondents stated they intended to take a short break/ holiday in The National Forest during the next 12 months, whilst 15% of respondents stated that they intended to make a day trip to the National Forest in the next 12 months.

Figure 4: Trip taken following receipt of guide



Just over one fifth (21%) of respondents indicated that they did not take a short break last year and 11% had taken a short break elsewhere.

Responses varied according to media channel, a full breakdown is shown in the table below.

	Overall	Where to Go	HGF	Premier Holiday Collection	UK Holiday Collection	E-Blast	STM	Staffs Guide
Base	331	110	17	44	60	39	12	6
Intend to take short break	22%	25%	41%	18%	23%	18%	29%	-
Did not take a short break	21%	24%	18%	23%	13%	23%	29%	25%
Made a day trip to the National Forest	16%	14%	-	14%	27%	21%	14%	33%
Intend to make a day trip	15%	13%	6%	23%	15%	10%	7%	17%
Took a short break in the National Forest	14%	14%	24%	14%	12%	10%	14%	25%
Took short break elsewhere	11%	12%	12%	9%	10%	18%	7%	-

Almost one quarter (24%) of respondents who had requested a guide via the HGF media channel had taken a short break to the National Forest in 2009, with a further 41% intending to take a short break during the next 12 months.

27% of respondents who requested a brochure through the UK Holiday Collection had made a day trip to the National Forest during 2009 as did 33% of respondents who had requested a Staffordshire Guide. *It should be noted that the results for the Staffordshire Guide are based on a small sample base and should therefore be treated with caution.*

3.04 Taken a Short Break Elsewhere

The 34 respondents who had taken a short break /trip elsewhere were asked to specify where they had visited. The most popular response provided was Wales noted by 5 respondents.

Other areas visited included; Chester, the New Forest, The Cotswolds, Norfolk, Oxford, Torquay and York, noted by 2 respondents respectively. Other destinations mentioned by 1 respondent respectively included; Bakewell, Blackpool, Somerset, Keswick, York, Shropshire, Skegness, Peak District, Paris, Paignton, Nottinghamshire, Lincolnshire, Cambridge, London, Newark on Trent, West Sussex, Suffolk, Salisbury, Southwell and Windermere.

3.05 Reasons for Short Break Elsewhere

Just over a fifth (22%) of respondents who had taken a short break elsewhere stated this was because they had visited the destination before and enjoyed it and a further 22% stated that there were more preferable attractions/things to see and do.

Closer/more convenient (19%) and made a visit to their friends and relatives (19%) were other reasons cited by respondents for visiting another destination. Cheaper, better weather elsewhere and desired accommodation full in National Forest & Beyond was mentioned by 1 respondent each.

Only 7 respondents stated 'other' reasons for taking a short break elsewhere and reasons provided included; no transport, went with friends who picked the destination, wanted to be near the sea, moving house, had not been before, spent two weeks at different places and needed accommodation for a large party.

3.06 Change of format to the 2011 Visitor Guide?

All Respondents were asked if the format of the guide changed what would they like to see in the 2011 Visitor Guide. From the options provided the most popular response, by 81% of respondents was the Guide was fine as it was and the format did not need to change.

8% stated they would like the guide to be just an accommodation guide, 6% stated information relevant just for families and a further 6% stated 'other'.

Respondents who said other were asked to specify the change they would like to see. The options provided by 1 or 2 respondents are as follows:

- Add disabled information / public transport / accommodation
- Provide information in audio and Braille
- Dog friends places / places to go with dogs
- More an attractions, less on accommodation
- More details for OAP
- More information on places to visit and opening times
- More information on walks
- More specific photos of the area
- Used coupons

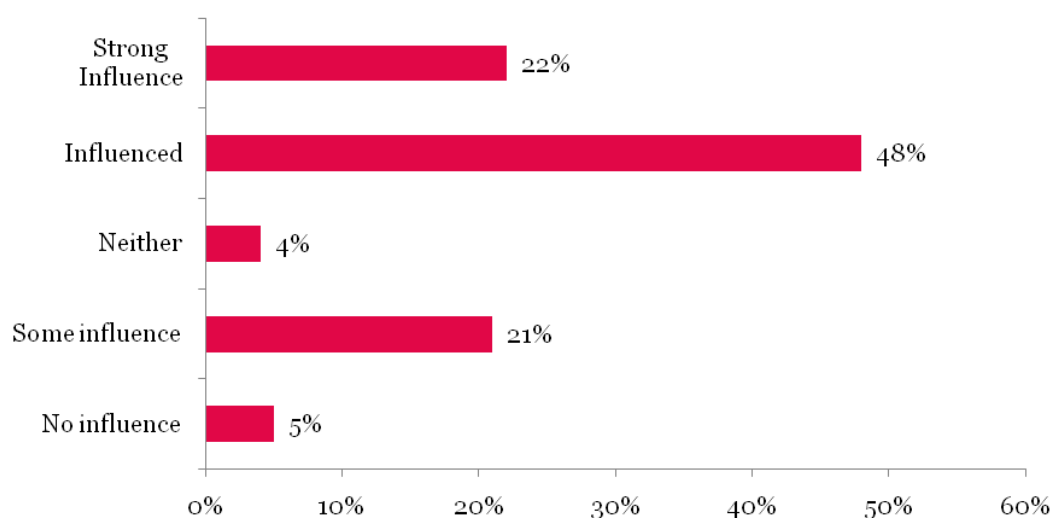
4.0 Summary Findings about Visit to the National Forest

The following analysis is based only on the 120 respondents to the survey who had visited or intended to visit the National Forest for a short break, although not all respondents commented on every question. The analysis for E-Blast, Staffordshire Guide and the Sunday Telegraph Magazine are based on very small sample sizes and therefore should be treated with Caution.

4.01 What Influence was the Guide in Persuading a Visit?

Seven out of ten (70%) respondents who had visited or intended to visit the National Forest stated that the Guide had influenced or strongly influenced their decision to visit during 2009. Just over one fifth (21%) felt the Guide had some influence on their visit, whilst 5% stated the Guide had no influence at all.

Figure 5: Influence of Guide



The National Forest Visitor Guide was influential in persuading a visit to the National Forest for respondents requesting a Guide through the majority of the media channels.

Table 5: Influence of guide - by Media Channel

	Overall	Where to Go	HGF	Premier Holiday Collection	UK Holiday Collection	E-Blast	STM	Staffs Guide
Base	120	43	11	12	21	11	6	2
Strongly Influenced	22%	28%	18%	33%	29%	-	-	33%
Influenced	48%	47%	27%	58%	29%	64%	83%	67%
Neither	4%	2%	9%	-	-	9%	17%	-
Some Influence	21%	21%	27%	-	43%	18%	-	-
No Influence	5%	2%	18%	8%	-	9%	-	-

Those respondents requesting a Guide through both Premier Holiday Collection and Staffordshire Guide were more likely to have been influenced than respondents from any other media channel (91% and 100% respectively stating strongly influenced or influenced). Over two fifths (43%) of respondents who had requested a guide via the UK Holiday Collection stated that the Guide had some influence on their decision to visit in 2009.

4.02 Main Purpose of Visit

The main purpose of visit by respondents who had visited / would be visiting the National Forest includes; walking (56%), visiting woodlands (55%) and visiting a historic/heritage site (50%). A further 46% of respondents stated they would be visiting an attraction and 14% would be cycling. 12% of respondents stated that they would be attending an event in the National Forest.

The research carried out in 2007 based on the 2006 National Forest Guide saw similar patterns by the main reason to visit the National Forest. However, there has been an increase in visits to the woodlands during this time and may be related to the maturing of the wooded area of the National Forest with respondents more aware of the Forest as a Woodland area.

The main reasons for visiting the National Forest varied by each media channel, however most were similar to the overall percentages. However, UK Holiday Collection respondents were more likely to be visiting an historic/heritage site (62%) compared with only 30% of the Holiday Guide Finder respondents.

Table 6: Main reason for visiting - by Media Channel								
	Overall	Where to Go	HGF	Premier Holiday Collection	UK Holiday Collection	E-Blast	STM	Staffs Guide
Base	117	41	10	14	21	10	5	3
Walking	56%	66%	60%	43%	43%	50%	80%	33%
Visiting Woodlands	55%	61%	40%	57%	43%	50%	80%	-
Visiting a historic/heritage site	50%	49%	30%	43%	62%	50%	60%	33%
Visiting an attraction	46%	44%	40%	50%	52%	30%	80%	67%
Cycling	14%	20%	10%	-	10%	20%	20%	-
Attended an event in the National Forest & Beyond	12%	12%	10%	14%	14%	20%	-	-
Shopping	11%	10%	3%	21%	14%	-	-	-
Woodland crafts and survival skills	9%	12%	-	21%	5%	10%	-	-
Other	9%	2%	10%	14%	5%	20%	-	33%
Visiting friends/relatives	3%	2%	10%	7%	5%	-	-	-
Horse riding	3%	2%	-	-	5%	10%	20%	-
Walking	2%	66%	60%	7%	-	-	-	-

NB: figures add up to more than 100% due to multiple responses given

4.03 Length of Visit (Nights)

Almost half (45%) of respondents had or would be staying between 1-3 nights on their visit with a further quarter stating between 4-6 nights. Almost one third (32%) of respondents said they had or would be staying in the National Forest for 7 nights or more nights.

Of those respondents who had actually taken a break in the National Forest, over half (57%) had stayed between 1-3 nights compared with 38% of respondents who intended to take a short break.

Almost one quarter (22%) of respondents who had taken a break had stayed for 7 or more nights in comparison with those intending to take a break for the same period (37%).

The average length of stay for visitors who had taken a short break in the National Forest was 3.9.

The average length of stay for those respondents who intended to take a short break was 4.9.

Table 7: Length of visit - by Media Channel

	Overall	Where to Go	HGF	Premier Holiday Collection	UK Holiday Collection	E-Blast	STM	Staffs Guide
Base	116	41	10	14	20	9	5	3
1 Night	7%	2%	20%	21%	5%	11%	-	-
2 Nights	16%	17%	10%	21%	10%	11%	40%	-
3 Nights	22%	17%	20%	14%	35%	22%	20%	33%
4 Nights	14%	12%	10%	21%	15%	22%	-	33%
5 Nights	9%	5%	10%	-	10%	11%	20%	-
6 Nights	2%	-	10%	-	5%	-	-	-
7 Nights	23%	29%	20%	14%	15%	22%	20%	33%
8 - 14 Nights	8%	16%	-	7%	5%	-	-	-

NB: Table may not add up to 100% due to rounding

45% of respondents requesting a Guide through the Where to Go media channel were more likely to be staying or intending to stay in the National Forest for 7 or more nights.

In contrast over two fifths (42%) of those requesting a guide through the Premier Holiday Collection channel were staying or intending to stay in the National Forest between 1 and 2 nights.

4.04 Month of Visit

The most popular months for visiting was between April and June with just over half (51%) of respondents stating this period. A further 41% of all respondents stated between July and September as their preferred months to visit the National Forest.

11% of all respondents said they would visit the National Forest between the months of October and December and a further 6% between January and March.

Across all media channels, it is clear that the most popular months to visit the National Forest are April, May and June.

Table 8: Month of visit - by Media Channel

	Overall	Where to Go	HGF	Premier Holiday Collection	UK Holiday Collection	E-Blast	STM	Staffs Guide
Base	117	41	10	14	21	10	5	3
Jan-March	6%	-	-	7%	-	20%	20%	-
Apr-June	51%	51%	80%	43%	67%	50%	40%	-
July-Sept	41%	41%	10%	57%	29%	60%	20%	67%
Oct-Dec	11%	15%	10%	-	14%	10%	20%	33%

NB: The sample size for the Staffordshire Guide and STM media channels are small and therefore results should be treated with caution.

Those respondents who had requested the National Forest Guide via the Holiday Guide Finder Enquiries were more likely than any other media channel to visit during the months of April-June (80%).

The months of July to September were most popular for those respondents that requested guide via the Premier Holiday Collection channel (57%), E-Blast (60%) and Staffordshire Guide (67%).

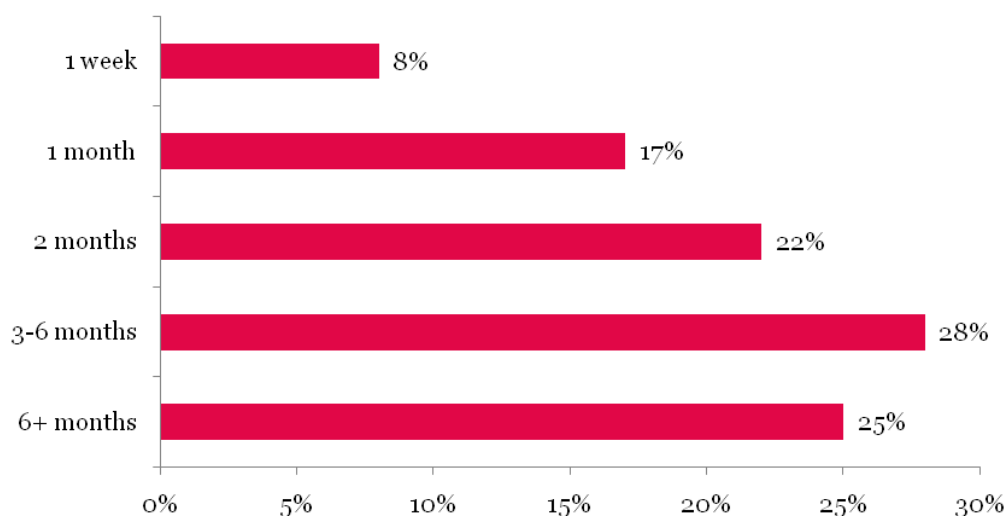
The early months of the year (January to March) were the least popular with respondents across all media channels.

4.05 Lead in Time

Respondents were asked how long before making their trip to the National Forest had they decided to visit. A quarter of all respondents (25%) said they had made the decision to visit the National Forest over 6 months in advance. This has decreased slightly since the study undertaken in 2007 where almost a third (32%) had decided to make a visit to the National Forest 6 months in advance. Just over a quarter (28%) had made the decision to visit between 3 and 6 months beforehand and almost one fifth (17%) stated that they had decided to visit 1 month before their trip.

Just over one fifth (22%) had decided to visit the National Forest 2 months before their trip, whilst 8% of respondents had decided to visit the National Forest just 1 week before their trip, compared with 5% in 2007.

Figure 6: Lead in time



The table below shows the lead in time of respondents broken down by media channel.

Table 9: Lead in time - by Media Channel								
	Overall	Where to Go	HGF	Premier Holiday Collection	UK Holiday Collection	E-Blast	STM	Staffs Guide
Base	106	36	8	12	20	10	5	3
1 week	8%	3%	13%	-	10%	30%	-	-
1 month	17%	17%	-	25%	15%	-	60%	33%
2 months	22%	28%	-	25%	20%	20%	-	33%
3-6 months	28%	22%	63%	33%	30%	30%	20%	-
6+ months	25%	31%	25%	17%	25%	20%	20%	33%

NB: The sample size for the Staffordshire Guide and STM media channels are small and therefore results should be treated with caution.

Respondents who requested a National Forest Visitor Guide through the Where to Go media channel were slightly more likely to make a visit further in advance than any other respondents, with 31% recording a lead in time of more than 6 months.

Respondents from the E-Blast media channel were more likely to make a visit within 1 week and respondents using the Premier Holiday Collection media channel were most likely to decide to visit 1 month in advance (25%).

Just over half of all respondents (53%) were likely to decide to visit The National Forest between 3-6 months in advance of their trip.

4.06 Type of Accommodation

Non serviced accommodation provided over half (54%) of the preferred type of accommodation, with 30% of respondents stating they had or intended to stay in self catering accommodation and almost one quarter (24%) in caravan / camping accommodation. In 2007, the highest level of accommodation used was serviced accommodation (59%).

Just over half (51%) of respondents stated they had or would be staying in serviced accommodation (25% in a B&B / guesthouse and 24% in a hotel). Only 3% said they had or intended to stay with friends and relatives on their visit and 4% in 'other' accommodation. 'Other' responses included youth hostels, farms and motor-homes.

One third (33%) of visitors who had already taken a short break, stated hotel as their preferred choice of accommodation compared with 18% of those who intended to take a short break.

The table below shows a breakdown of the type of accommodation used by respondents from the various media channels.

	Overall	Where to Go	HGF	Premier Holiday Collection	UK Holiday Collection	E-Blast	STM	Staffs Guide
Base	114	40	10	13	20	9	5	3
Self Catering	30%	25%	30%	15%	30%	67%	-	-
B&B/Guesthouse	25%	23%	30%	31%	40%	-	60%	-
Hotel	24%	28%	20%	23%	25%	11%	40%	33%
Caravan/camping	24%	40%	20%	31%	10%	11%	-	33%
Other	4%	-	-	-	10%	11%	-	33%
Friends/Relatives	3%	5%	10%	-	-	-	-	-

N.B. Responses may add up to more than 100% due to multiple answers given

NB: The sample size for the Staffordshire Guide and STM media channels are small and therefore results should be treated with caution

Those respondents who requested a National Forest Visitor Guide through the Where to Go Enquiries were more likely to stay in caravan / camping accommodation (40%), compared with respondents from any of the other media channels. B&B / Guesthouses were most popular with respondents using the UK Holiday Collection enquiries (40%) and the Sunday Times Magazine (60%). 10% of respondents using the Holiday Guide Finder as a media channel stayed with friends and relatives.

4.07 Location of Accommodation

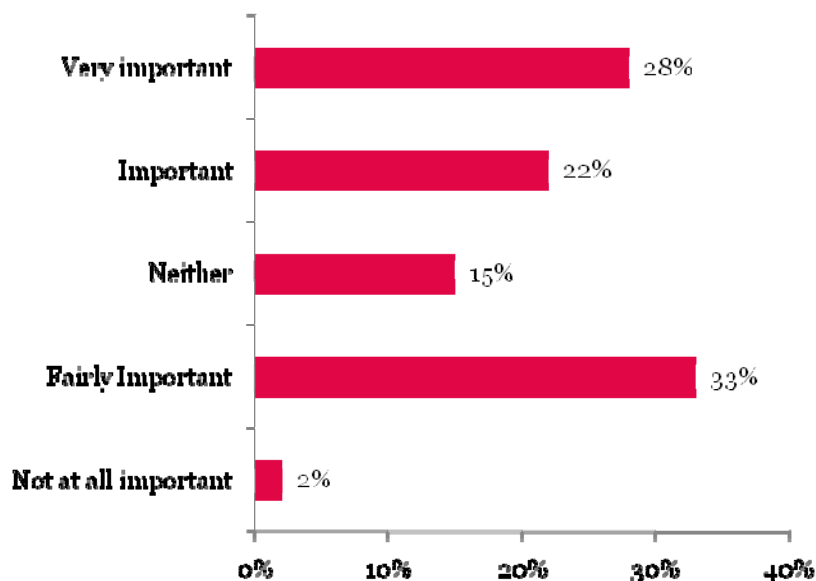
Respondents were asked to specify the location of their accommodation. 22 respondents who had or intended to visit the National Forest provided a response to this question, of which 3 stated they had either not yet booked or the accommodation location was to be confirmed.

Of those who did provide a location, these included the following; Ashby de la Zouch, Burton on Trent, Coalville, Ellastone, Hartshorne, Ibstock, Market Bosworth, Measham, Melbourne, Nottingham and Rosliston.

4.08 Importance of quality grading of Accommodation

Respondents were asked if the rating of accommodation (i.e. 2 stars, 3 star etc) was important to them when booking accommodation. The average (mean) score given to the importance of accommodation rating Forest by those respondents who had actually made a visit was 3.4 out of 5, with half (50%) stating that it was 'very important' or 'important'.

Figure 7: Important of quality grading of accommodation



(The chart above is based only on those respondents who had actually made a visit to the National Forest in 2009 and responded to this question (46no)).

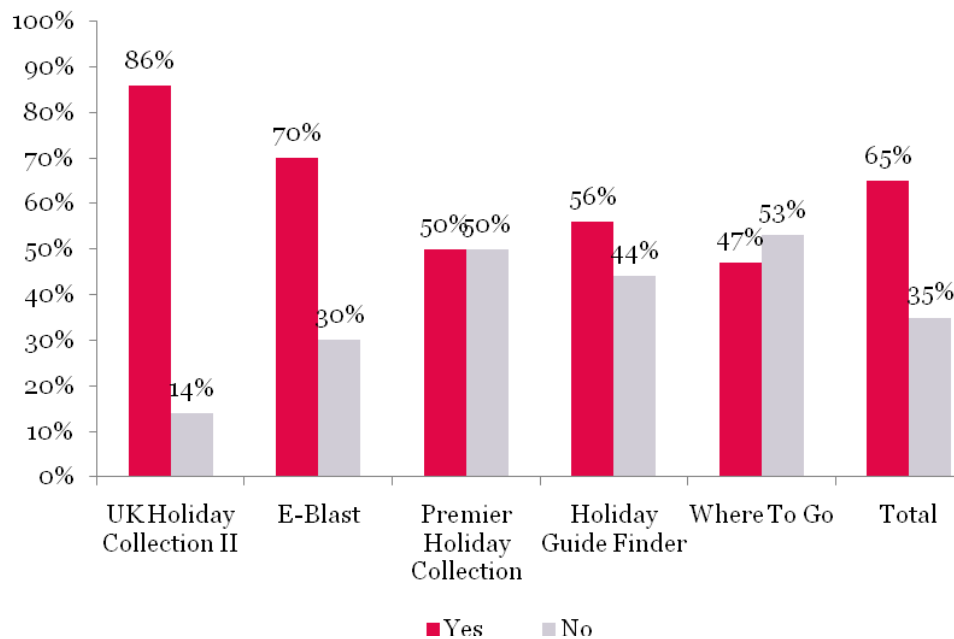
4.09 Use of the Visitor Guide to find individual websites

Respondents were asked to specify if they had used the visitor guide to find individual websites for any attractions or accommodation providers within the National Forest & Beyond.

Almost two thirds (65%) of respondents said they had or intended to use the Visitor Guide to find individual websites for attractions or accommodation providers.

Proportions varied slightly across the various media channels; however, overall a higher percentage of respondents did use the Visitor Guide to locate individual websites.

Figure 8: Use Guide to locate individual websites



Respondents using the UK Holiday Collection II channel (86%) were more likely to use the Guide to locate individual websites for attractions or accommodation providers, followed by those respondents who requested a guide via E-Blast (70%).

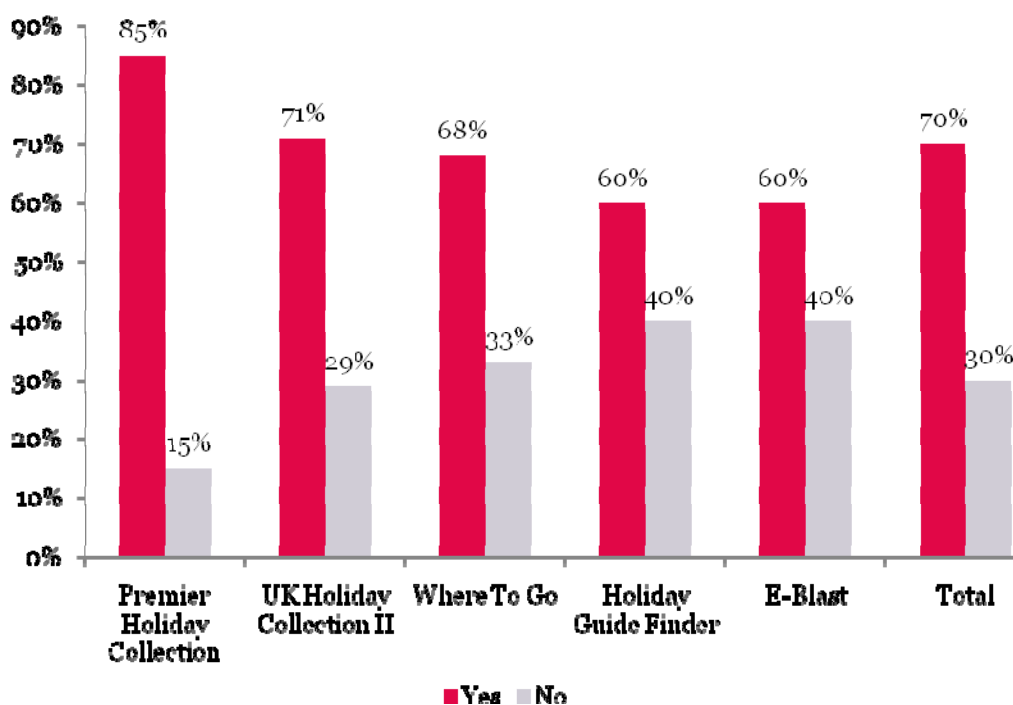
Respondents who had requested a guide via the Where to Go channel were least likely to have used the website to find individual websites for attractions or accommodation providers (47%).

4.10 Use of visitor guide to assist accommodation booking

Respondents were asked if they had used the visitor guide to assist them with their accommodation booking. 7 out of 10 respondents stated they had used the guide to assist them with their accommodation booking in The National Forest.

Proportions varied slightly across the various media channels

Figure 9: Use of Guide to assist accommodation booking

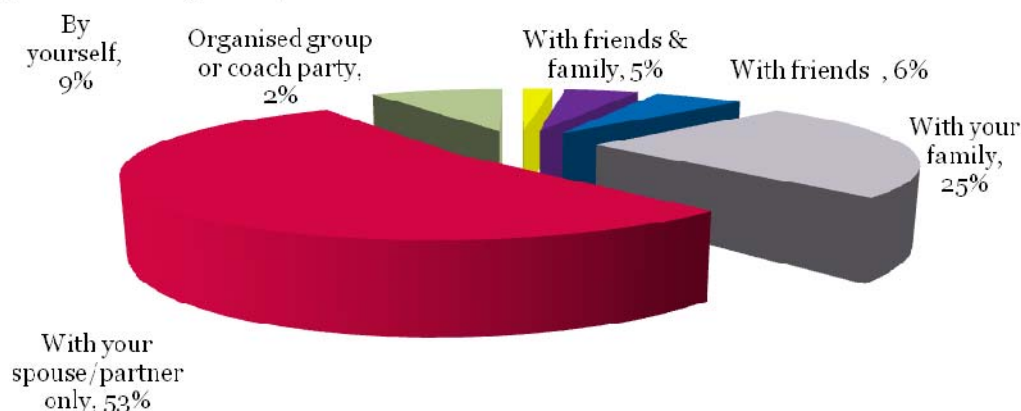


Respondents who requested a guide using the Premier Holiday Collection channel (85%) were more likely to use the Guide to assist with their accommodation booking, compared with respondents who had requested a guide via the Holiday Guide Finder or E-Blast (60% respectively).

4.11 Travelling Companion and Group Structure

Over half (53%) of respondents had or would be travelling with their partners to the National Forest with a further one quarter travelling with members of their family. 9% said they had or would be travelling on their own.

Figure 10: Party Composition



Almost one third (30%) of visitors who had already taken a break to the National Forest had visited with their family compared with 22% who intended to make a trip. Almost three fifths (56%) of visitors who intended to make a trip stated they would visit with their partner/spouse only, compared with 48% who had already taken a break. The table below shows the breakdown of group structure by media channel.

Table 11: Party Composition - by Media Channel

	Overall	Where to Go	HGF	Premier Holiday Collection	UK Holiday Collection	E-Blast	STM	Staffs Guide
Base	122	43	11	13	21	11	5	3
Alone	9%	2%	9%	23%	24%	-	-	-
With Spouse/Partner	53%	56%	73%	46%	52%	27%	67%	67%
With Family	25%	23%	9%	23%	14%	64%	17%	33%
With Friends	6%	9%	-	8%	5%	-	17%	-
Friends and Family	5%	7%	-	-	5%	9%	-	-
With an Organised Group	2%	2%	9%	-	-	-	-	-

On average, the number of people per party who **actually visited** the National Forest was **3.8**.

On average, the number of people per party who **intend to visit** the National Forest is **3.1**.

4.12 Age Profile of Visitors to the National Forest

The National Forest clearly appeals to the older age group in terms of this campaign, with 45 year olds and over accounting for almost two thirds (65%) of respondents who had or intended to take a trip to the National Forest.

Table 12: Age Profile - by Media Channel

	Overall	Where to Go	HGF	Premier Holiday Collection	UK Holiday Collection	E-Blast	STM	Staffs Guide
0-15	12%	10%	5%	11%	9%	24%	11%	33%
16-24	7%	4%	5%	4%	3%	20%	-	-
25-34	4%	1%	-	11%	12%	-	-	33%
35-44	12%	15%	14%	7%	9%	16%	-	-
45-54	15%	9%	19%	11%	18%	20%	33%	-
55-64	31%	34%	38%	37%	30%	16%	44%	33%
65+	19%	26%	19%	19%	18%	4%	11%	-

NB: Table may not add up to 100% due to rounding

This was similar across all media channels with just over one quarter (26%) of respondents who had requested a guide via the Where to Go media channel aged 65 or over, compared with only 4% from E-Blast.

5.0 Summary Findings of all Respondents

5.01 Number of miles from place of residence to the National Forest

There was a fairly even spread of respondents who lived between 50 – 150 miles from The National Forest.

The highest proportion of respondents lived between 51 and 100 miles away (25%), followed by 24% of respondents stating that they lived less than 50 miles from the National Forest. One fifth (20%) of respondents indicated their normal place of residence was over 200 miles from the National Forest.

The following table shows the number of miles respondents lived from The National Forest.

	Overall	Where to Go	HGF	Premier Holiday Collection	UK Holiday Collection	E-Blast	STM	Staffs Guide
Base	184	55	12	25	38	18	8	7
0-50 miles	24%	18%	25%	28%	42%	22%	-	14%
51-100 miles	25%	36%	33%	32%	8%	22%	25%	-
101-150 miles	16%	16%	25%	4%	8%	28%	25%	14%
151-200 miles	15%	9%	-	12%	21%	11%	38%	29%
200 or more	20%	20%	17%	24%	21%	17%	13%	43%

Respondents of the Staffordshire Guide were more likely to live further from The National Forest with over two thirds (43%) living over 200 miles away, followed by Premier Holiday Collection (24%).

Respondents requesting a Guide through the UK Holiday Collection channel were closer to The National Forest, with 42% of respondents live under 50 miles away.

5.02 Time since last visit to the National Forest

Over half (55%) of respondents to the survey had visited the National Forest before. Of those respondents, almost one quarter (24%) had visited during the past two years. Under one fifth (16%) had been between 2 and 5 years ago and 15% of respondents had visited the National Forest over 5 years ago.

Figure 11: Time since last visit to the National Forest

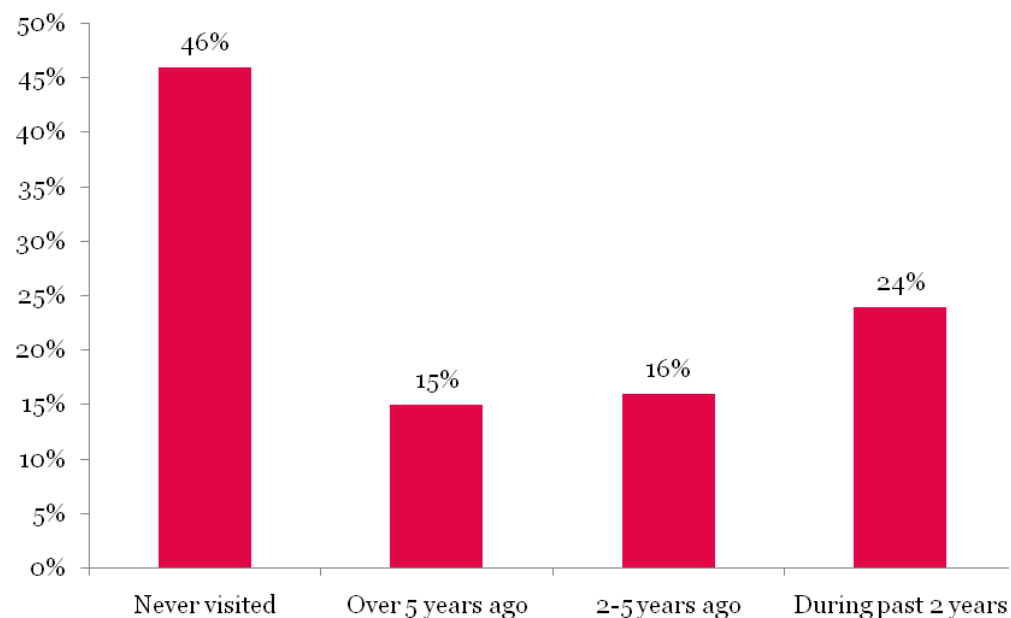


Table 14: Visited the National Forest before- by Media Channel

	Overall	Where to Go	HGF	Premier Holiday Collection	UK Holiday Collection	E-Blast	STM	Staffs Guide
Base	193	59	11	25	39	20	8	8
Never Visited	46%	44%	36%	56%	44%	35%	38%	88%
Visited during past 2 years	24%	22%	45%	28%	26%	15%	-	13%
Visited 2-5 years ago	16%	20%	9%	4%	15%	25%	25%	-
Visited over 5 years ago	15%	14%	9%	12%	15%	25%	38%	13%

Almost 9 out of 10 (88%) Staffordshire Guide respondents and 56% of Premier Holiday Collection respondents had never visited the National Forest.

5.03 Type of previous visit to the National Forest

Looking at the type of previous visit, Over half (52%) of respondents stated that their previous visit had been for the day, and 14% had previously stayed overnight.

Almost half (47%) however stated that their previous visit had been for a short break in the area.

The table below indicates the type of previous visit undertaken by media channel.

	Overall	Where to Go	HGF	Premier Holiday Collection	UK Holiday Collection	E-Blast	STM	Staffs Guide
Base	104	34	7	11	22	12	5	1
Day Trip	52%	53%	14%	60%	68%	33%	60%	-
Overnight stay	14%	3%	-	30%	23%	8%	40%	100%**
Short Break	47%	50%	86%	30%	27%	83%	40%	-

NB: responses will add up to more than 100% due to multiple answers given.

*** Small sample size*

86% of respondents who requested a Visitor Guide via the Holiday Guide finder were most likely to have previously visited for a short break. Respondents who used the UK Holiday Collection channel were most likely to have visited for a day trip (68%), with Premier Holiday Collection respondents most likely to have visited for an overnight stay (30%).

5.04 Access to the Internet

All respondents were asked if they had access to the internet. Just over two thirds (67%) of respondents stated that they did have access to the Internet, an increase of 8 percentage points since the study in 2007 when 59% stated they had Internet access.

Figure 12: Access to the Internet

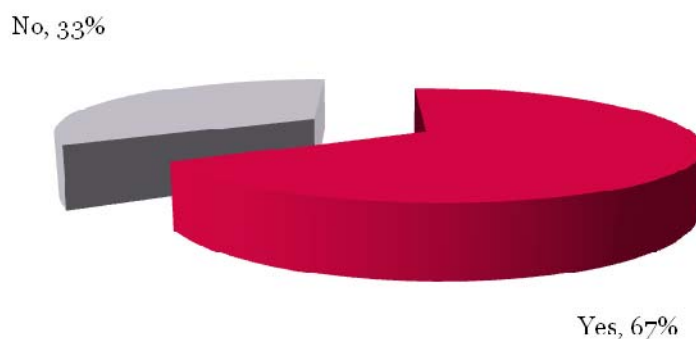


Table 16: Access to the internet- by Media Channel								
	Overall	Where to Go	HGF	Premier Holiday Collection	UK Holiday Collection	E-Blast	STM	Staffs Guide
Base	246	69	9	34	41	36	12	10
Yes	67%	58%	44%	47%	41%	100%	100%	90%
No	33%	42%	56%	53%	59%	-	-	10%

Only 41% of respondents who had requested a Visitor Guide through the UK Holiday Collection channel had access to the internet.

5.05 The National Forest Website

The questionnaire asked respondents if they had visited the National Forest website.

Just under half (48%) of respondents who had access to the Internet stated that they had visited www.visitnationalforest.co.uk. Over two thirds (67%) had visited the website as a result of receiving the Guide.

Respondents were also asked how easy they found it to locate the information that was relevant on the website. Just over half (53%) found that the website was 'easy' to navigate and glean

information from. Over one quarter (27%) found it 'very easy'. No respondents stated they had found it 'difficult' or 'very difficult'. The remaining 21% stated they found the website 'moderate'.

Table 16: Ease of using website - by Media Channel

	Overall	Where to Go	HGF	Premier Holiday Collection	UK Holiday Collection	E-Blast	STM	Staffs Guide
Base	78	10	2	9	7	23	7	6
Very easy	27%	60%	100%	11%	29%	13%	43%	33%
Easy	53%	20%	-	67%	43%	65%	43%	50%
Moderate	21%	20%	-	22%	29%	22%	14%	17%
Difficult	-	-	-	-	-	-	-	-
Very difficult	-	-	-	-	-	-	-	-

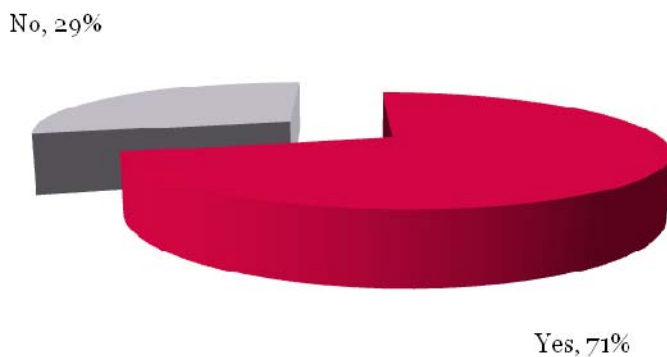
NB: not every respondent answered this question. Therefore some of the sample sizes are relatively small and results should be treated with caution.

29% of respondents who requested a guide via the UK Holiday Collection channel stated they found the website 'moderate' to use.

5.06 Online Booking Facility

When asked if they would use an online booking facility if it were available, almost three quarters (71%) of respondents said that they would make use of it. This has risen significantly since 2007 when only 49% stated they would make use of the on-line booking facility.

Figure 13: Online booking



5.07 Comments or Suggestions about the Website

Respondents were asked if they had any comments or suggestions about the National Forest website. 24(no) responded to this question and the responses are detailed in the table below.

	%	No.
Very good website	33%	8
Well organised / easy to understand	25%	6
Easy to use	17%	4
Helpful website	8%	2
More ease for find dog friendly accommodation	8%	2
Quick to process information	4%	1
Well designed	4%	1
Attractive Layout	4%	1
Need to show more places to visit	4%	1
Opening times need to be clearer	4%	1

NB: Table will not add up to 100% due to multiple responses given

5.08 Comments or Suggestions about the Guide

Similarly, respondents were asked if they had any comments or suggestions about the National Forest Guide. 62(no) responded to this question and the responses are detailed in the table below.

Table 19: Comments about The National Forest Guide		
	%	No.
Very informative / good information/helpful	61%	38
Fantastic guide	15%	9
Easy guide to uses	10%	6
Good layout/design	8%	5
Attractive brochure	8%	5
More information on walks and more maps	3%	2
More dates for future events / news	3%	2
More places to visit with dogs	3%	2
High quality guide	2%	1
Better than most guides	2%	1
Good public transport information	2%	1
More information for day trippers needed	2%	1
More photos of the actual area	2%	1
More accommodation listings	2%	1
More attention given to singles	2%	1

NB: Table will not add up to 100% due to multiple responses given

6.0 Expenditure, Party Size, Nights & Estimations of Domestic Campaign Impact

6.01 Domestic Expenditure Generated by the National Forest & Beyond Visitor Guide 2009

A total of 332 parties responded to the survey, 17% of the sample. Their impacts are shown in the following section of this report.

6.02 Overnight Visitors Directly Influenced by the Guide

The Research Solution mailed and posted a questionnaire on-line to a sample of 1,965 of the 8,754 domestic names and addresses held on the National Forest database from the 2009 campaign. 332 responses (17%) were received and thus a factor of x26.37 can be applied to all estimates.

The analysis indicated that of the total sample returned (332), 17 were directly influenced by the Guide (i.e. not those who were coming anyway and requested the Guide for more information) and those who actually made a visit for a short break, giving a conversion rate of enquiries to bookings of 5%.

- It is estimated that the 17 parties spent at least £6,045 staying overnight.
- With an average party size of 2.4 people, this equates to an average spend of £355.59 per group per trip, and an average spend of £148.16 per person per trip. Average number nights = 4.2, equating to £35.28 per person per night.
- In order to calculate the sample to population of the total database ratio, $8,754/332$ (respondents) = 26.37
- 17×26.37 factor = 448 parties which generates an approximate visitor expenditure of **£159,304**.
- 448 parties indicated that they had visited the National Forest as a direct result of the Guide x average number of nights (4.2) x average people per party (2.4) = **4,516 nights** generated

- £159,304 generated by domestic visitors
- 448 parties visited the National Forest & Beyond
- £355.59 per group per trip
- £148.16 spend per person per trip
- x 4.2 nights = £35.28 per person per night
- 4,516 nights generated

6.03 Day visits by those directly influenced by guide and who took a day trip to the National Forest

- It is estimated that the 49 parties spent at least £2,569 on a day visit to the National Forest
- With an average party size of 3.1 people, this equates to an average spend of £52.43 per group per trip, and an average spend of **£16.91** per person per day.
- 49×26.37 factor = 1,292 parties which generates an approximate visitor expenditure of **£67,740**

6.04 Visitors intending to take a short break directly influenced by the Guide

The analysis indicated that of the total sample returned (332), 54 were directly influenced by the Guide (i.e. not those who were coming anyway and requested the Guide for more information) and those who intended to visit for a short break in the next 12 months, giving a conversion rate of enquiries to bookings of 16%.

- It is estimated that the 54 parties intend to spend at least £18,592 staying overnight.
- With an average party size of 2.6 people, this equates to an average spend of £344.30 per group per trip, and an average spend of £132.42 per person per trip. Average number of nights = 4.6 nights equating to £28.79 per person per night.
- 54×26.37 factor = 1,424 parties which generates an approximate visitor expenditure of £490,283.
- 1,424 parties indicated that they intend to visit the National Forest & Beyond as a direct result of the Guide x average number of nights (4.6) x average people per party (2.6) = **17,031 potential nights generated**

- £490,283 potentially generated by domestic visitors intending to visit
- 1,424 parties who intend to visit the National Forest & Beyond
- £344.30 potential spend per group per trip
- £132.42 potential spend per person per trip
- x 4.6 nights = £28.79 potential spend per person per night
- 17,031 potential nights generated

6.04 Expenditure by requests made through Where to Go Guide who actually made a visit to the National Forest & Beyond

- 8 people actually came and directly influenced
- £88,747 generated by domestic visitors
- 211 parties who visited the National Forest & Beyond
- £420.60 spend per group per trip
- £145.04 spend per person per trip
- x 5.0 nights = £29.00 spend per person per night
- 3,060 nights generated

6.05 Expenditure Summary

It is necessary to combine the information provided by those who actually visited the National Forest and were directly influenced by the Guide with those visitors who intend to visit the National Forest and were also directly influenced by the Guide. **This amounts to 71 respondents and a conversion rate of enquiries to bookings (or potential bookings) of 21%.**

As specified previously, the analysis indicated that of the total sample returned (332), 17 were directly influenced by the Guide (i.e. not those who were coming anyway and requested the Guide for more information) and those who actually made a visit for a short break, giving a conversion rate of enquiries to bookings of 6%.

54 respondents were directly influenced by the Guide (i.e. not those who were coming anyway and requested the Guide for more information) and who are intending to visit the National Forest in the next twelve months for a short break, giving a further conversion rate of enquiries to bookings of 16%.

The total amount spent by those who **actually visited** the National Forest & Beyond and had been **directly influenced** by the Guide was **£159,040** + the total estimated amount of expenditure by those who **intended to visit** the National Forest and had been **directly influenced** by the Guide is **£490,283**.

= **£649,323**
= **21,547 Nights Generated**

7.0 Conclusion

7.01 Review

The following summary is of the core Guide and respondent profiles, as well as the economic/trips conversion generated as a result of the National Forest & Beyond Visitor Guide Marketing Campaign;

What Prompted Request of Guide

- 74% requested the Guide to find out more about the area
- 18% wanted the brochure to help book their trip
 - These can be described as being **influenced** by the Guide (92%).
- 8% had already decided to visit the area but wanted help to book their trip
 - These respondents used the Guide to **facilitate** their trip.

Trip Taken Following Receipt of Guide

After respondents had received the Guide:

- 14% had taken a short break in the National Forest in 2009
- 23% stated that they intended to take a holiday / short break in the next 12 months
- 16% of respondents indicated that they had taken a day trip to the area after receiving the Guide.
- 15% stated the intend to make a day trip to the National Forest
- 11% had taken a short break elsewhere
- 21% did not take a short break

Therefore, 14% of respondents had made an overnight visit to the National Forest, and a further 16% of respondents made a day visit to the area.

Group Structure

- The average party size of visitors who had actually visited the National Forest was around 3.8 people
- The average party size of visitors who intend to visit the National Forest is 3.1 people
- Almost one third (31%) of visitors to the National Forest were adults aged between 55 to 64. A further 19% of visitors to the National Forest were in the +65 age bracket. It is clear that this campaign was attractive to visitors in the older age group.
- In total, over half (53%) of visitors had travelled to the National Forest with their spouse/partners, one quarter had travelled with family and 9% of respondents travelled alone. Visitors travelling with friends accounted for 6% and those with friends and family accounted for 5% of visitors. Only 2% of respondents had travelled with an organised group.

Expenditure, Nights and Visitor Number Estimations of Campaign Impact

Overall total of overnight visitor spend by those directly influenced by the visitor guide in 2009 and had made or intended to make a visit to the National Forest.

- **£649,323** generated by domestic visitors
- 18721 parties visited/intend to visit the National Forest & Beyond
- £347.00 per group per trip
- £138.80 spend per person per trip
- 4.5 nights = £30.84 per person per night
- **21,547** nights generated