

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

FINAL REPORT



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1. INTRODUCTION

1.1 Why do we need to develop tourism further?

The National Forest (TNF) needs to address tourism because, given the investment to date, this is where it now has an emerging comparative advantage; tourism can contribute further towards business development and employment creation and help deliver the strategic objective of establishing a National Forest that is attractive for residents and visitors. Tourism is already an important part of the wider economy contributing £267m in 2007, supporting over 4,000 jobs in the area. Tourism facilities also add to the quality of life and help make an area an attractive place in which to live, work and do business. A vibrant visitor economy supports local infrastructure and many of the amenities that residents and local businesses benefit from; public transport, shops, restaurants and other services.

Tourism also has negative impacts. It can affect the natural environment and can change the general character of an area. The growth in visitors contributes to development pressures and congestion on the roads and at key sites. Labour issues can emerge if there is competition.

The industry itself is fragmented, comprised predominantly of small businesses, often slow to respond to opportunity and with no control over the whole visitor experience. Left to itself, the market will not promote the destination effectively. Individual tourism attractions work to promote themselves with no common message and thus lose the greater benefit that can be achieved through a co-ordinated approach.

These issues dictate the need to manage tourism, to maximise the benefits and avoid or minimise the negative impacts.

1.2 Why do we need a Vision?

Since TNF was established in 1991, tourism in the Forest has grown faster than expected. New woodlands and open spaces with public access have been created, new attractions have been developed (e.g. Conkers, Rosliston Forestry Centre, National Memorial Arboretum) and others have been improved. There is a calendar of events attracting new visitors. New hotels, a youth hostel and self-catering accommodation have also been developed. Public awareness of the Forest has now reached effective proportions. Visitors are coming in increasing numbers and the management of tourism is now requiring an ever-greater commitment from stakeholders. That commitment needs a broader Vision to provide context and clarify aspirations.

The National Forest Strategy¹, which incorporates sections on tourism and related themes (access, transport) has provided that context to date but the tourism agenda now needs to be brought up to date to reflect current goals and objectives, especially the issue of sustainability which is at the heart of The National Forest's agenda.

In June 2007, East Midlands Tourism (EMT) commissioned a review of how the region can maximise new tourism opportunities presented by new and planned

¹ The National Forest: The Strategy 2004-2014

investment within the sector². It was recommended that stakeholders should look to establish a clear and coherent Vision for tourism in TNF, a Vision that would present the area as an exciting and new tourism destination with a strategic fit in relation to the DMPs and identify relevant tourism investment opportunities.

In 2008, the National Forest Company (NFC) organised a 'Visioning Day' for their partners and stakeholders where. *"It was agreed that a 20 year Vision was needed because:*

- *There is regional recognition of TNF as an emerging destination, which needs to be nurtured if it is to fulfil its potential.*
- *It will provide clarity on the direction for sustainable tourism in TNF and define its USPs. This will underpin TNF's sustainable tourism action plan and its marketing and communications.*
- *Partner engagement and wider awareness varies through the Forest and a unified Vision will provide coherence.*
- *With variances in funding and grants across the two regions and three counties, it will help direct resources, partner priorities and actions and provide a framework and rationale for funding bids.*
- *It will be reflected in any planning framework that reflects a systematic, co-ordinated and collective approach to development control, adopted by planning authorities.*
- *There is an inconsistent geographic spread of attractions, accommodation, transport and infrastructure across the Forest. A Vision will help to redress this variance and help partners to develop the product.*
- *The need for a visitor management strategy was outlined as a long-term action in The National Forest Strategy 2004-2014."*

Following the Vision, a series of short-term (5 year) Action Plans will be needed to help bring the Vision to fruition. This report provides the new Vision to 2028 and the first five year action plan (2009-2014).

1.3 Approach and methodology

The Tourism Company was commissioned by the NFC to prepare this Vision and Action Plan for all TNF's tourism stakeholders. Work commenced in February 2009 with an inception meeting with officers of the NFC. This was followed by numerous site visits throughout the Forest and desk research to familiarise ourselves with the relevant policies and wealth of data and information on tourism in the Forest gathered in recent years.

We have held a series of face-to-face consultations with key stakeholders including the six district local authorities, two Regional Development Agencies (RDAs) and three Destination Management Partnerships (DMPs) that cover TNF and facilitated a discussion meeting of TNF's Tourism Working Group (see Appendix IV for a list of consultees). We have also undertaken an on-line survey of operators (see Appendix V) to gather data and seek out industry views on the Vision and Action Plan.

All this evidence has been drawn together to create this draft document to be presented to key stakeholders in May 2009 for discussion and debate prior to finalisation.

² Investment Opportunities Assessments for Leicestershire & Rutland and Derbyshire, Scott Wilson for EMT, 2007.

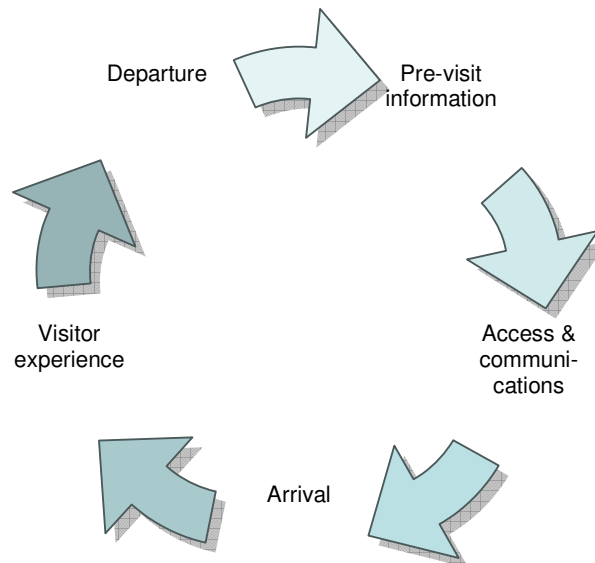
2. CURRENT TOURISM CONTEXT: KEY ISSUES

In this Chapter we look at the key issues that were identified in the tourism context review (Appendix I). This covered the current tourism product in TNF, the existing visitor market and review how it is performing as a tourist destination.

2.1 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 2.1: The Visitor Journey



2.1.1 Pre-visit promotion and information

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.*

2.1.2 Access and communications

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 TNF is poor and as a result most visitors come by private car.*

2.1.3 Arrival and welcome

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.*

2.1.4 The Visitor Experience: **Countryside and 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.*

2.1.5 The Visitor Experience: **Towns and villages**

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.*

2.1.6 The Visitor Experience: **Accommodation**

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 TNF 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.*

2.1.7 The Visitor Experience: **Food and Drink**

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.*

2.1.8 The Visitor Experience: **Attractions**

Key Issues:

- *There is a wide range of attractions in and around the Forest including some major facilities.*
- *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.*

2.1.9 The Visitor Experience: **Walking and cycling**

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.*

2.1.10 The Visitor Experience: **Other outdoor activities**

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.*

2.1.11 The Visitor Experience: **Events and festivals**

Key Issues:

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

2.1.12 The Visitor Experience: **Retail**

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.*

2.1.13 Follow up

Key Issue:

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

2.2 The scale and nature of the visitor 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, 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.*

2.3 The performance of tourism businesses in the Forest

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.*

2.4 The organisation of tourism in the Forest

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 three local authorities to come together to promote TNF and surrounding area.*
- *Other agencies including the other 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.*

3. CURRENT POLICY CONTEXT: KEY ISSUES

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 the tourism strategies being followed by the relevant agencies and the broader planning and community development policy context for the local area.

In this Chapter we look at the key issues that were identified in the full policy context review in TNF (Appendix II).

3.1 Local tourism policy

3.1.1 Regional Development Agencies (RDAs)

Key Issues:

- *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.*

3.1.2 Destination Management Partnerships (DMPs)

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.*

3.1.3 Local Authorities

Key Issues:

- *All six district local authorities have an involvement in tourism.*
- *South Derbyshire, North West Leicestershire and Lichfield District are particularly committed 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.*

3.2 Local planning policy

Key Issues:

- *Planning policy towards tourism in TNF is positive but there is some concern about how some 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.*

3.3 Sustainability and other cross-cutting themes

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.*

4. STRATEGIC CONTEXT AND CHANGE

Previous chapters have featured the product, past performance and the policy framework but tourism is essentially market driven and is constantly changing over time in response to internal aspirations and external drivers. TNF, like all visitor destinations, needs to identify and respond to these forces and potential scenarios in order to effectively control and manage its tourism development and compete in the market place successfully. Clearly, that is not always feasible but understanding and responding to change is critical to devising a robust strategy for the future.

In this chapter, we consider the external drivers of change³ and the implications for the future, drawing these conclusions into a SWOT analysis based on the existing tourism and policy context and consider scenarios for the future.

4.1 The external drivers of change in tourism

4.1.1 General economic, demographic and tourism trends

- Tourism is closely linked to the state of the economy but holidays are often more resilient than many other household items. The current recession (and exchange rates) will constrain and re-direct tourism growth but not cut it off. People see holidays now as an essential and although some will cancel, the tendency is to cut back or re-plan rather than do without totally.
- The young (<35 years) and families are more likely to cut back than the empty nesters and older groups.
- While overseas tourism to the UK is set to grow slowly (subject in part to exchange rates), domestic tourism has been broadly static since 2000. However, there is optimism in some quarters that worsening exchange rates and the desire to save might encourage more domestic tourism⁴.
- Sectors which are likely to do better than others in the long-term are short breaks, VFR and business tourism although the latter is subject to the state of the economy.
- The UK population is growing slowly but becoming older, in common with most European countries. Many 'empty-nesters' of the baby boom era have been brought up to a life of travel and they will be reluctant to give this up.
- Other changes we can expect to see will be:
 - A more ethnically diverse population.
 - More single person households, fewer traditional family households.
 - More of the population classified as ABC1.
 - Better educated and more mobile households.

³ See Appendix for more detail.

⁴ This year 60% of Britons are planning to stay at home this Easter according to a recent RAC survey, double the number of last year.

- The probability that many people will have to work longer to fund their retirement.

4.1.2 Changing attitudes and lifestyles

Attitudes towards holiday taking and use of leisure time are changing and include:

- The search for well-being and escape from a world where people are full-on, all the time. There is a need to wind down, turn-off, and recharge the batteries – in a high quality, safe and secure environment - as a response to increasingly busy and pressured lives.
- At the same time people want to get more value out of their leisure time and pack more in. They often like to do more and activities such as walking, cycling, riding - and more extreme activities - are increasingly popular.
- A fragmented market where people increasingly seek tailor-made experiences to satisfy their own particular needs and predilections. This can apply even to members of the same family group.
- Discerning, sophisticated consumers who are widely travelled and know what they want and pride themselves in getting value.
- The search for special and memorable experiences as opposed to simply choosing a rest & relaxation destination. People are looking for authentic and distinctive experiences as a reaction against increasing homogeneity. They are also seeking experiences which are aspirational and which fit with their lifestyle. There is also a desire for more shared experiences, particularly family 'togetherness'.
- The rise of the green and ethically motivated consumer and an increased awareness of environmental issues. People want to feel good about their choices although evidence suggests that they may be reluctant to significantly change their behaviour in the short term. This is borne out by recent Visit Britain research.
- Increasing importance of brands, customer reassurance and recommendation in an era of seemingly limitless choice, fuelled by the internet.

4.1.3 Technology

Modern technology is shaping the way we communicate and green technologies are now being incorporated in tourism buildings:

- 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 and travel networking websites have important implications for customer feedback, reviews and broadening the scope of 'word of mouth' marketing.

- Mobile technology now gives these opportunities a new dimension. Tourism should be a major beneficiary, providing information to those on the move despite a perceived desire by some to 'turn off'.
- 'Green technology' is evolving rapidly. Tourism facilities offer a good opportunity to showcase the options including the highly relevant timber construction and use of wood fuel as a source of combined heat and power.

4.1.4 Transport

After decades of improved transport capacity and speed facilitating the growth of tourism, a more negative trend is clear:

- Traffic congestion will get worse which may result in an increase in travel costs through plans for road pricing and other initiatives. This is critical for day trips and short breaks. As an antidote to this, 'slow travel' by public transport, on foot, by bike or canal boat may become an attractive proposition in its own right.

4.1.5 Environmental pressures and concerns

Although the effects of climate change may make England a more appealing holiday destination, the impact of global warming on tourism is unlikely to be straightforward and has the potential to wreak havoc with the world economy.

- It seems increasingly likely that the real environmental cost of flying will have to be reflected in fares and airport taxes which will affect both inbound and outbound tourism and may make domestic holidays a more attractive proposition. This could have a big impact on the short break market. Businesses and destinations will also face additional costs in adapting to these changes.
- There are already early signs that a certain section of the market is becoming more concerned with ethical and environmental issues and will take this into account in choosing a holiday product. Many operators are also adopting corporate responsibility – and responding to this market change.
- In the face of globalisation and concentration, local distinctiveness is likely to become a significant driver for tourism and highly attractive for visitors. Regions that retain this will have added appeal.

4.2 Implications for the future

No-one can say with certainty what the cumulative impact of these changes will be. Some of these drivers push in different directions and may cancel each other out. There is no single model for success - each destination or region is different with a unique set of opportunities and constraints to contend with.

The clear lessons we can learn from experience are that:

- Notwithstanding local population growth, tourism growth will have to come from capturing market share from other places.

- Competition is fierce. Increasing market share will be a challenge and will require a continuing programme of investment in marketing and product development.
- Funding for tourism and related infrastructure from both the public and private sectors is likely to become more constrained. Those proposals that embrace a number of government policy areas will be the strongest contenders.
- Marketeers will need to be aware of the ever-more diverse market and its requirements.
- Short breaks are here to stay and will remain the dominant format for domestic staying visitors. Business tourism will always be an important market.

Successful destinations will:

- Maintain and/or develop their public profile and communicate how they are adapting to changing needs.
- Continue to invest in quality and choice to meet the needs of discerning and experienced consumers.
- Make it easy for people to book and arrange flexible, last minute offers, tailor-made to suit their needs and exploit new technology.
- Create distinctive, civilised and well managed places which stand out from the run of the mill and make an area worth visiting.
- Offer a range of experiences for the visitor which are authentic, enriching, engaging and provide opportunity to refresh the mind and the body.
- Demonstrate they are taking action to address environmental and ethical concerns.
- Provide a product and experience which has appeal to a range of different markets to avoid over exposure to risk and volatility.
- Establish a balance between the needs of visitors and those of permanent residents to avoid conflict and retain the feel of a real place.

4.3 SWOT analysis (strengths, weaknesses, opportunities and threats)

The tourism resources and background context considered in earlier chapters can now be considered in the light of external drivers and related implications to undertake a SWOT analysis.

Table 4.1: SWOT analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> • Central England location • Good road (and air) access • Maturing woodland • A network of trails and countryside access sites • A good network of attractions including a number of icons e.g. NMA • An evolving focus of tourism in Rosliston-Moira-Ashby • Range of forest-related activities and events • Supportive policy of stakeholders including the NF&Beyond partnership • NFC leadership • Local business confidence 	<ul style="list-style-type: none"> • Low profile destination • Weak brand development • Inconsistent quality in product • Immature and still patchy woodland • Poor public transport access • Urban areas will continue to be in transition • Varied public accessibility to woodland and water spaces • Limited range and supply of visitor accommodation • Lack of quality retailing • Large number of agencies involved in tourism in TNF including partial promotion by 3 DMPs • Varied level of commitment by public agencies

Opportunities	Threats
<ul style="list-style-type: none"> • Large diverse and growing catchment population to exploit • Robust environment with scope for further development, targeted new planting and access opportunities particularly through new woodland trails and water spaces • Investment associated with new visitor infrastructure/facilities and growth points • Growing interest in environmental issues • Growing interest in healthy, outdoor pursuits • To support and benefit from a range of cross-cutting initiatives • Behavioural changes related to climate change 	<ul style="list-style-type: none"> • Long-term recession • Lack of investment • Reduced management resources • Constraints on travel • Lack of commitment to common Vision • Lack of commitment to the Forest brand • Heightened competition from other rural destinations • Inconsistent planning policy approach for tourism infrastructure • FMD or similar

4.4 Scenarios for tourism

It is 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. Under each of these scenarios (see Appendix III for more detail), TNF should actually perform relatively well.

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

2. **Financial meltdown:** What if...the recession really bites over the next decade or more and public and private sector resources become severely limited? 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 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.

3. **The environmental imperative:** What if...there is a rapid escalation of concern over climate change and the state of the environment? 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 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. Operators 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'.

5. THE TOURISM VISION FOR THE NATIONAL FOREST

Notwithstanding the external drivers and potential scenarios, the future of tourism in TNF will be largely determined by internal aspirations, the Vision for tourism and the commitment to that Vision by stakeholders.

5.1 Tourism aspirations for the Forest

In the early 1990s, the first report on 'Sport, recreation and tourism' in TNF was prepared. The Vision then was that:

"The Forest offers a unique opportunity to create a new destination based on optimum accessibility to attractive woodland countryside supported by a diverse range of facilities and activities for all abilities, ages and groups. It offers the opportunity to plan a substantial, integrated and unique tourism destination based on outdoor activity."

The National Forest Strategy (2004-2014) and the current NF tourism strategy (2004-2009) reflect the earlier Vision:

"The aim is to create a new, national, tourism destination based upon substantial outdoor activity and a variety of indoor attractions. Existing tourism attractions will blend with new Forest attractions and a growing and changing network of new woodlands, trails and sport and recreation facilities."

"Tourism development aims to create better facilities for local residents and surrounding towns and cities, and a national resource for longer stays by people from across the country..... Visitors can come and see, enjoy, learn about and literally help create this new 'Forest in the making' "

These Visionary aspirations have helped drive tourism in the Forest to date and remain relevant. The new Vision builds on these aspirations, a number of key assumptions and five over-arching principles.

5.2 Underlying assumptions

The cross-cutting assumptions are that:

- A successful tourism destination relies upon a wide range of facilities and services that are outside the direct control of tourism agencies. Central to the offer is the overall quality of the environment and even in the case of rural destinations like TNF, the quality of the urban environments – where much time and most money is spent – is critical. This also emphasises the importance of the other regeneration agencies and their initiatives including urban regeneration, transport, the arts and cultural development, local recreation facilities and access by all modes.
- By the same token, tourism can help sustain a range of products and activities that will be of great benefit or help raise the quality of life of residents and meet a number of current cross-cutting objectives including healthy lifestyles, provision for the young, support for the rural economy.

- A long-term Vision is critical. Although much has been achieved since the Forest was established, there is still much to do to create a successful, high quality and competitive destination. It will take another 20-30 years for the tree cover to reach the target of around one third of TNF area and for much of the new plantation to reach maturity. Landscape restoration and town enhancements have a similar time-line and the growth points will take many years to come to fruition. Tourism development will have to evolve at a similar rate.
- There needs to be an understanding of the scale and complexity of this major rural regeneration project. There are few direct comparators on this scale of tourism destinations being ‘created’ from a former coalfield area.

5.3 Fundamental principles

At their ‘Visioning Day’, NFC partners agreed that the underlying tourism principles for the Vision, as identified in The National Forest Strategy, should be⁵:

- Sustainability.
- Clear National Forest destination branding.
- Quality and value.
- Accessibility and inclusion for all.
- Partnership working.

To this list should be added, adaptability to different circumstances and scenarios.

5.3.1 Sustainability

The World Tourism Organisation defines sustainable tourism as: *“Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities.”*⁶

Sustainable tourism is not a particular kind of tourism that just appeals to a market niche that is sensitive to environmental and social impacts, serviced by particular types of product and operators. Sustainable tourism means tourism that is based on the principles of sustainable development; the objective is to make all tourism more sustainable i.e. the actions of all tourists and tourism operators. The term should refer to a condition of tourism, not a type of tourism.

Sustainability principles refer to the environmental, economic and socio-cultural aspects of tourism development and a suitable balance must be established between these three dimensions to guarantee its long-term sustainability. The following Principles have formed a framework for selecting the proposed Action Plan points and should be used in future monitoring.

⁵ TNF branding we see as a key action point rather than a fundamental principle.

⁶ Making tourism more sustainable; A guide for policy makers, UNEP/WTO, 2005.

Principles for sustainable tourism development

Maintenance of high and stable levels of economic growth and employment

1. Sustainable growth of tourism as an integral contributor to the economy, adding value and making best use of indigenous resources and existing tourism infrastructure across the region.
2. Responsible investment in the quality of the tourism product and related services in order to provide a high quality experience, throughout the year, for all segments of the market.
3. Investment in local people skills and capacities in the region's tourism industry, making full use of the local labour supply to fill a range of existing and new high quality jobs in the tourism sector.

Social progress that meets the needs of everyone

4. Sustainable growth of tourism that supports local cultural distinctiveness and contributes to the quality of life in the communities of the region.

Effective protection of the environment and prudent use of natural resources

5. Adoption of a more sustainable approach to tourism activity by visitors and regional businesses.
6. Conservation and enhancement of the built and natural environment through effective visitor management across a diverse region.
7. Development of an integrated, viable transport infrastructure that enables a realistic choice of travel mode to and within the region, supported by a management regime that encourages greater use of walking, cycling and public transport by visitors.

5.3.2 Quality

Increasingly it is recognised that quality management in tourism is central to sustainable success. For example, tourists are looking for appealing environments that will attract them to stop and spend money within the local community. It is the better quality destinations, often irrespective of price, who identify with customers and pay attention to their needs that perform the best. TNF and its partners in tourism, backed by the Vision, should be the guardians and champions of destination quality, seeking to influence local authorities, communities and businesses.

Quality involves focussing on both the visitors – understanding them and delivering what they want – and involving local people and tourism businesses in the management of the destination, as participants in, and as customers of, the management process.

A quality based approach requires three basic elements to be present in a destination:

- *A mechanism whereby all the key players are working together to a strategy.* This is about identifying the destination, maintaining a partnership between stakeholders and preparing and developing a sound tourism strategy that is well understood and communicated. It requires clear leadership and partnership structures to be in place and commitments by the stakeholders to the overall strategy.
- *Concern about delivering quality at all stages of the visitor experience.* For a destination to be a success there must be consistency in approach and service across all areas that visitors come into contact with. The visitor experience from the beginning to the end is at the heart of a quality management process.

- *Commitment to monitoring and improvement, as an ongoing cyclical process.* This is about checking on visitor satisfaction; checking on impacts on businesses, the community and the environment; setting and assessing standards; working together to make improvements; and repeating the process on a regular basis.

5.3.3 Accessibility

TNF's core product is access to the countryside. That aspect can be developed on a number of planes:

- Physical access to and within TNF should be available by all means of transport and for all abilities.
- All groups, particularly those at a disadvantage e.g. the young, the elderly, the disabled, the less affluent and ethnic minorities should be actively encouraged to enjoy TNF by addressing potential barriers and promoting relevant activities.
- Access to the core product should not be constrained by any significant financial barrier. Most outdoor activity is available free of charge and should be promoted as such to encourage higher participation.

5.3.4 Partnership working

The NFC can and does have a direct influence on destination development, most notably in terms of woodland creation and related access. However, its main role in tourism is to act as a facilitator, providing support for a variety of product developments and marketing initiatives. This is a Vision and Action Plan for all tourism stakeholders in the Forest, not just the NFC. It will require new channels and mechanisms to enhance communication within the sector and with related agencies.

5.3.5 Adaptability

The Vision for tourism over the next 20 years is likely to remain consistent. The means of achieving it however - and the time-frame - needs to be adaptable over the 20 year period, to accommodate unforeseen change. The 5 year Action Plans should incorporate a review of shorter-term goals and objectives for the Vision as well as necessary actions.

5.3.6 Summary

These principles suggest that stakeholders should seek to create a tourism sector in TNF that:

- Maximises value from the optimum number of visitors that can be managed effectively within an evolving product, drawing on specified target markets.
- Offers a distinctive high quality experience to visitors, leaving them eager to return and keen to spread the word to others.
- Supports viable, forest-appropriate tourism businesses - and non-commercial operators - able and willing to invest in sustainable businesses with well trained staff and high quality facilities.
- Supports new initiatives that have cross-cutting benefits across the wider regeneration agenda.

5.4 The Vision statement

A draft Vision statement was prepared in late 2008 at a meeting of stakeholders. We have made a small number of minor modifications shown in bold within the original text:

TNF will be recognised and enjoyed as one of the top ten high quality sustainable destinations in the country. Its unique offer will be shaped around:

- *A high quality, exciting and varied visitor experience in the setting of young and maturing woodlands, within an attractive, coherent landscape.*
- *Accessibility, inclusivity and value for money.*
- *Opportunities for enjoyable, exciting learning and recreation within a woodland setting **all year round.***
- *A national exemplar of economic impact through environmental excellence.*
- *A maturing tourism market with a wide range of quality attractions for a wide range of visitors.*
- *Day trips for the surrounding populations and short breaks both playing a full part in the tourism offer and economy.*
- ***Professional local businesses and a community that welcome tourism for the wide benefits it brings to the local economy, community and the environment.***

The operator survey has enabled individual operators to consider their Vision for tourism in TNF. In general their aspirations reinforce the proposed vision above. They envisaged:

- Establishing and promoting an attractive, environmentally sustainable woodland environment in which to stay and relax.
- Growing tourism through a co-ordinated network of small and large operators; accommodation providers, wildlife attractions, events and related services.
- Developing the towns as attractions linked to the woodland with sustainable transport to and within the Forest.

A simple strapline will be needed to capture this Vision. Most recently, this has been “*A Forest in the making*”. This will need to be the subject of further discussion, along with other options, as part of a new marketing plan.

The Vision for tourism in TNF is part of a wider ambition to create an attractive place in which to live, work and visit.

5.5 Overall target

The overall target is to deliver long-term and sustainable growth in the value of the visitor economy i.e. around 3% average annual growth in visitor expenditure with concentrated efforts towards growing the proportion of staying visitors. Individual targets will be set once benchmarks have been established (see Chapter 7).

6. STRATEGIC OBJECTIVES AND ACTION PLAN

The strategic objectives for tourism in TNF reflect the vision expressed above, the key strengths of TNF, the policy priorities and the external drivers. The five key principles - sustainability, quality, accessibility, partnership and adaptability - are the essential principles underlying the Strategy.

The five strategic objectives are:

1. To improve the quality of the Forest tourism product to fit the changing needs of potential visitors seeking a wide range of high quality and value for money experiences.
2. To develop and sustain the unique environmental resource of the emerging Forest – the Forest’s USP - and supporting infrastructure for the benefit of visitors and residents.
3. To improve tourism business performance in TNF, enabling future re-investment and new job opportunities.
4. To focus marketing initiatives on key target opportunities through effective destination, thematic and tactical campaigns, improved co-ordination and packaging of suppliers.
5. To ensure that all tourism stakeholders in and around TNF are working effectively together to realise the Vision, informed by good quality, up to date information.

6.1 Strategic objective 1: Developing a high quality, good value visitor experience in TNF

Quality and value are key principles and improving the experience on both counts is crucial in attracting visitors and getting them to return. The Vision involves enhancement at two levels:

1. Develop specific facilities and activities for those with a potential interest in TNF and its inherent attractions. In order to compete with other rural destinations, there is a need to create products of distinction i.e. distinctive woodland experiences including a range of outdoor activities for all with active participation and learning with supporting visitor infrastructure in the form of accommodation, attractions and other amenities. Ideally, these facilities should seek to gain appropriate quality accreditation. We address these elements of the product below, following the visitor journey model.
2. Create an accessible, attractive destination for the general visitor i.e. the majority. This places emphasis on the enhancement of the urban areas with high quality amenities as this is where visitors spend much of their time and money. It also places importance on the maintenance and management of the rural product, the woodlands and the activities developed therein – and the links with urban areas. Such infrastructure development is largely outside the control of tourism agencies but is essential. It is addressed under Strategic Objective 2.

6.1.1 Improve welcome and information delivery

A good welcome and orientation, based on accurate information, is crucial. The right level of information should be delivered when and where people need it.

This is a time of change in the field of tourist information owing to pressure on local authority resources and development of new digital and mobile information systems. Dedicated TICs will continue to play a role at key destinations where personal contact is so important, but given restricted resources, there may be a need for more alternative outlets for visitor information within various tourist facilities e.g. at attractions, accommodation and within local communities in pubs, shops and libraries as well as making use of the existing Rangers at countryside sites.

TNF should work with its partners to ensure a consistent approach to information delivery across TNF. On-going action should include:

- Monitoring the presentation and content of NFC website and reviewing the potential for information dissemination via mobile technology.
- Co-ordinating and linking local operator and destination websites.
- Ensuring the provision of high quality local information print.
- Providing static welcome information at gateways and key sites including rail and bus stations.
- Providing information to guide book editors.
- Encouraging the on-going provision of TICs in towns.

The main supplementary action should be to develop the role of tourism 'hosts' in local enterprises (attractions, accommodation, shops, taxis) and other services (libraries, public transport etc), training and enabling people who can provide local knowledge and information to guests.

Action Point:

- 1. Maintain, monitor and extend production and dissemination of tourist information (ongoing)**
- 2. Develop a short 'local information' course, supported by familiarisation trips, for key people who interact with visitors in their place of work**
- 3. Review the strategy for information provision across TNF every 5 years**

New, branded signposts (welcome signs on TNF borders and signposts to key attractions) help raise the profile of TNF and help orientation and direction. Pedestrian signposting in town enhancement schemes is considered in 6.2.1 below.

Action Point:

- 4. Work with highway authorities to review tourism signposting policy and provision of new branded signs**

6.1.2 Support the development of good quality accommodation

In product terms, the main priority is accommodation. The lack of quality serviced accommodation, particularly at the higher end, is a major weakness of TNF. This is a major challenge given the need to raise profile and encourage more staying visitors. Ideally, TNF should have one or more four/five star (resort) hotels in the centre of TNF⁷ – and branded as 'Forest' hotels - and/or a number of smaller boutique hotels of distinction. There is also a need for more B&Bs in pubs, on the canals, farms and

⁷ Project proposals include Conkers, Barton Marina and the proposed FA National Football Centre.

in private homes. The new youth hostel has shown how good quality, environmentally sensitive provision can attract a new market. In conjunction with this, there is scope to improve the overall quality of the existing serviced accommodation stock. Accommodation development will be assisted through:

- Encouraging accommodation development and upgrading in local planning policy and control.
- Promoting participation in grading schemes.
- Using the inspection process to identify opportunities for further investment.

Business tourism in serviced accommodation is already important in TNF and meetings/conferences present an opportunity for gaining more high value business. Current facilities are limited. The main opportunities involve improving provision in hotels and at certain attractions and other special venues rather than new purpose-designed facilities.

Priority should, however, be given to the development of more high quality, accredited self-catering accommodation and, in particular, exemplar forest cabins. A cabin development of 100-120 units – once a mature woodland site is identified - would be a flagship project for TNF. There are opportunities for a range of other accommodation products including:

- Smaller, individual cabin schemes.
- The conversion of redundant farm and industrial buildings
- Boat rentals (private and fleet hire) and visitor moorings on the canals.
- Camping and caravan sites for touring caravans.
- New and converted ‘bunk barn’ type accommodation.
- Further youth hostel accommodation.

Action Point:

- 5. Prepare visitor accommodation market review, clarify planning policy and identify potential hotel and holiday village development sites**
- 6. Support the upgrading of visitor accommodation as appropriate, including the provision of meeting facilities (ongoing)**

6.1.3 Become a market leader in high quality land and water based activity holidays

The developing network of access and related activities in the new woodland areas and elsewhere in TNF is an emerging USP of the destination. Many regions have demonstrated the importance of well promoted, attractive and well-maintained public rights-of-way in generating business for rural communities but in TNF there is an opportunity to develop, from new, an integrated network of multi-use (and all-ability) trails of the highest standard.

The National Forest Trail⁸ will be the iconic attraction and promotional tool but other priorities are:

- To create a clear hierarchy and network of Forest-branded, short and medium length circular access routes all around TNF for walkers, cyclists and riders, linking points of interest and centres of accommodation. This network should be based on clear strategies for walking, cycling and riding in the Forest⁹.
- To develop an exemplary network of fully accessible routes within the trail network.

⁸ The National Forest Trail: An assessment of potential use and impact, TTC 2008.

⁹ Co-ordinated with the County Rights of Way Improvement Plans and local strategies e.g. the South Derbyshire Greenways Strategy.

- To maintain the whole rights of way network and new trails to a high standard.
- To improve the promotion, presentation and signage of all access points to the network including good quality parking, welcome information, interpretation, amenities (toilets, food concessions), public art etc.
- To develop and maintain the canal network, developing and improving facilities for boaters (moorings and other amenities at marinas etc) and towpaths for all users.
- To encourage day trip boats and cruising on the canals.

Action Point:

- 7. Support the planning, development and maintenance of a Forest-wide network of waymarked public footpaths, multi-use and all-abilities trails and related services (ongoing)**
- 8. Support the maintenance and development of the canal network and related facilities and services, including the restoration of the Ashby Canal (ongoing)**

The woodland experience will evolve as the trees mature and more are planted particularly where strategic gaps are filled. In the longer-term, there will be opportunities for themed attractions like tree-top walkways, wildlife lookouts and even tree-house accommodation etc but in the short-term, there are a number of priorities:

- The upgrading and development of existing Forest gateway attractions at Conkers and Rosliston including the co-ordination of interpretation related to the Forest across all the attractions (see 6.1.5).
- The creation of new activity areas/facilities for forest related activities e.g. the proposed new cycling centre, water sports in the Trent Valley, motorised sport in appropriately designed venues, capitalising where possible on the opportunities offered by major restoration and landscaping works at old mineral sites.
- To encourage the development of new, or better, access arrangements to existing, water bodies for a range of water sports.

Activity holidays provide a special opportunity for TNF, including forest-related activities for which it has a comparative advantage e.g. walking, cycling, riding, conservation holidays, forest arts and crafts etc. Such activities are now indulged in all year. The region should aim to become a market leader in accessible, accredited and environmentally friendly activity holidays. Action to pursue includes:

- Provision of cycle hire, riding establishments and other multi-activity centres.
- Thematic marketing of activities and associated packages (see 6.4 below).
- Promoting environmental management and accreditation to all activity operators.

Action Point:

- 9. Review the opportunities for new (and improved access to) high quality, sustainable outdoor activity facilities**

6.1.4 Develop and coordinate events

The expansion of existing, and development of new, forest-related and participatory events will encourage greater participation in TNF – and act as a draw to visitors who might not otherwise visit. Events can also play an important role in stimulating year round tourism and encourage additional staying visitors.

An events strategy should be prepared to include:

- A coordinated programme of events across the region.
- Marketing and other potential support for relevant events.
- Assistance with the development of business plans for events.
- The development of one or more new events (sports, arts, crafts). Possible examples include a Forest Food Fair, a Burton Water Festival, a 'Residents Day', a Forest Marathon/Triathlon, a Forest Regatta, a 'Tour de la Forêt' cycle race, lumberjack competitions etc.
- Promotion of the Forest as a venue for appropriate third party events (arts, sports, woodland).
- A focus on events relevant to local product strengths e.g. environment and outdoor activity.

Action Point:

10. Prepare events strategy with view to identifying new opportunities

6.1.5 Strengthen the appeal and accessibility of attractions

In general terms, there is a good range of attractions. Priority should be given to strengthening the profile and appeal of existing attractions, gaining accreditation¹⁰ and, especially, encouraging longer out of season opening.

Actions to pursue include:

- The development of the HoF area as a focal point for visitors with a complex of accommodation, Forest interpretation and family activities that will have a critical mass of appeal and help raise the profile of TNF.
- The upgrading of all attractions and particularly the icons. Conkers, NMA, Snibston and Rosliston all have current proposals for upgrading/investment.
- The co-ordination of interpretation and other more formal learning opportunities related to the maturing Forest across all the attractions. It will be important to communicate a common story about the Forest, its growth, its ambitions and related environmental messages.
- Improving the geographical spread of attractions with:
 - A new visitor draw in the centre of Burton, hopefully a re-established brewery heritage centre.
 - Gateway/interpretation/orientation facilities to the west and east of the Forest i.e. within the Needwood and Charnwood Forests.
- Reviewing the opportunities for more environmental/nature related attractions.

Although new attractions are not a priority and funding for major attractions is particularly difficult at present, opportunities may emerge. A project that is appropriate to TNF, unique, high quality and raises the profile of TNF should be encouraged, subject to careful assessment of its long-term viability. Ideas include the proposed FA National Football Centre, a sculpture park and/or a major cultural facility.

Action Point:

11. Support the development of the Heart of the Forest and upgrading of the major gateway attractions (ongoing)

12. Co-ordinate the presentation and interpretation of TNF in all attractions

13. Review the opportunities for, and support appropriate attraction enhancement and new attraction developments at key locations

¹⁰ Accreditation through VAQAS, the Voluntary Charter, BAHA (for activity centres) or similar.

6.1.6 Encourage high quality catering and retailing

The quality and diversity of catering and retailing in TNF is seen as a weakness and an opportunity. Private sector investment in new, high quality retail and eating out opportunities within towns and at attractions, offering a range of local produce from wood crafts to locally produced food and drink will add to the experience of any visit and help support other local businesses.

The town centre improvement schemes should focus on creating the right environment attracting distinctive, high quality catering and/or retailing.

There may be scope for the existing NF produce directory to be developed with local branding and tied in with a quality marque.

Action Point:

- 14. Support initiatives to improve the quality and distinctiveness of catering and retailing in town centres and at attractions and events (ongoing)**
- 15. Support TNF food/craft producers, fostering networks and promoting quality standards (ongoing)**

6.2 Strategic Objective 2: Enhancing the Forest's environment and infrastructure

TNF's maturing natural environment, supplemented by elements of local built heritage, is its main strength as a tourist destination. This resource needs to be sustained through the on-going woodland initiatives and proposals for enhanced access. At the same time, there is a need to upgrade the urban infrastructure. Such initiatives will benefit local residents as well as visitors.

6.2.1 Improve the quality and appearance of the built environment

Given the recent industrial history of many of the urban areas, the quality of the built environment is poor in comparison with the wider countryside. Relevant action should include:

- Special attention to the appearance and sense of welcome at gateway points to towns and villages with information and orientation; landscaping the main entry routes (particularly the A38 and A511), better signposting, improving the appearance and safety of car parks and public transport access points, toilets and pedestrian routes to the local centres.
- High quality public realm improvements in the four main towns and selected villages through the growth area plans and other initiatives, particularly through new 'green infrastructure' funding. Focusing environmental improvements on the 'tourism envelope' i.e. that area within which the visitor is likely to spend time and money.
- Encouraging new, high quality design in buildings, public realm and public art, developing a distinctive Forest theme in design.
- Prevention of unattractive development through careful application of planning and development control policies.
- Conservation of redundant farm and industrial buildings.
- Encouraging regular management and maintenance of public areas.
- The presentation and interpretation of local heritage.

The enhancement of town and village centres i.e. the public realm - with 'green infrastructure' linking to the Forest - and support for appropriate new amenities will benefit both residents and visitors.

The level of provision, maintenance and management of car parks, toilets, street cleaning etc is very important to the overall visitor experience. The main requirement is that all departments of the local authorities and other relevant bodies, who have responsibility for public services, take full account of their use by tourists and the need to maintain a high level of quality of delivery in the interests of the local economy.

Action Point:

- 16. Plan and implement landscape and environmental improvements on key arterial routes including the A38 and A511 through TNF**
- 17. Support the development – and maintenance - of high quality urban environments in towns and villages with local themes including appropriate landscaping (ongoing)**

6.2.2 Improve the provision and promotion of public transport options

Public transport services to and within the Forest are weak, particularly within TNF, and the proportion of visitors coming without a car is low. In the short to medium-term, most visitors will continue to arrive by private transport. The aim should be to encourage these visitors to explore the Forest by other means once they have arrived, including the network of trails. In addition, efforts should be made to ensure that public transport provision, timetabling and promotion are improved in order to present the visitor with practicable alternative options.

Tourism will only play a marginal role in such transport infrastructure decisions in TNF but this role can be important and needs to be emphasised by tourism stakeholders. TNF should work with local authorities, Network Rail, British Waterways, operators and user groups to promote and lobby for improved public transport to and within the Forest. The short-term focus should be on improving alternative means of access for visitors once they are in the region. Long term ambitions should include The National Forest Line, the Ashby Canal and the upgrading of railway stations in and near TNF - and their rail services.- as gateways to Forest.

More should be done to promote existing public transport options and offers. For example, websites should provide links to transport operators and their routes/timetables.

Action Point:

- 18. Support continual improvement of public transport provision for, and promotion to, visitors within TNF, linking gateway towns and attractions (ongoing)**
- 19. Support new public transport initiatives that will improve access for visitors travelling to TNF (ongoing)**

6.2.3 Support sound environmental management

All stakeholders should be committed to the sustainable development of the industry. Concern for the environment is not just important in its own right but it is also critical for the future wellbeing of tourism in the area. TNF should earn a reputation for environmental concern in tourism.

Most visitors are looking for destinations with well maintained, attractive surroundings, including woodlands and well kept urban areas. Smaller but growing numbers are seeking destinations and enterprises which can demonstrate concern for good environmental management including energy saving, reduced pollution, use of local produce and responsible development.

Action to maintain and improve the environmental quality of destinations includes:

- Increased training in, and commitment to, environmental management for tourism enterprises.
- Encouraging greater participation in Green Start or the Green Tourism Business Scheme or similar.
- Establishing a pilot project to identify and develop local exemplars in sustainable tourism businesses.
- Fostering greater awareness of local environmental issues and support for conservation amongst visitors.

This is a time of considerable change in the rural economy. Increasingly, land managers play the role of custodians of the landscape. Tourism enterprises which are integrated with, and support, sustainable land management activities should be encouraged. This Tourism Vision should support sustainable land management as the local tourism industry in turn depends upon it. This includes support for good quality farm-based tourism along with all the other outdoor activities referred to as the visitor experience under Objective 3.

Action Point:

20. Engage with all tourism facilities (attractions and accommodation) to encourage and facilitate appropriate environmental management of their sites

6.2.4 Foster local distinctiveness

More could be made of the unique qualities of TNF, thereby stimulating and adding to visitor interest and the same time helping to sustain the local economy and benefit local communities.

Relevant action includes:

- Reflecting local themes in the design of new tourism facilities and other buildings and, in particular, the use of wood in construction and fuel systems (see 6.2.1).
- Supporting networks of food and craft producers, developing more linkages between them and tourism enterprises and promoting any local/quality standards and labels for local produce (see 6.1.6).
- Encouraging more interpretation of local themes and cultural heritage through attractions, events, arts venues and within the public realm (see 6.2.1).
- Encouraging local people to train and enter the industry (see 6.3.2).

Those who interface with the visitor have an important role to play in communicating this local distinctiveness with knowledge of local features, history and culture (see 6.1.1).

6.3 Objective 3: Improving business practice and performance in the Forest

The quality of the tourism experience and the profitability of local businesses (which are themselves inter-related) are considerably affected by the skills and outlook of local businesses and their staff. Low levels of customer service, poor management development and a lack of core technical skills are hampering the development of the tourism industry generally¹¹. These issues are compounded by high levels of staff turnover in the tourism sector which now has the lowest level of productivity of any sector in the UK. The operator survey undertaken for this work revealed few difficulties in recruiting and retaining staff but this is likely to change and reflect the national trend as the product grows.

Improving business practice and training is part of the drive for a high quality visitor experience and high on the learning and skills agenda of all local authorities and public agencies.

6.3.1 Raise awareness of business skills shortages

In most evolving destinations, the lack of management and business skills in small tourism enterprises and ancillary services is a problem. Sometimes this is brought about by a lack of appreciation of this deficiency by owners and managers, and in turn by insufficient understanding of needs and skills gaps by suppliers of support services and training. This requires more research into business needs and better communication with local businesses.

Action Point: 21. Undertake a training and skills needs analysis

Should a need be identified, a number of organisations offer training and business support services. Generally, the take up of these opportunities is poor. The problem is often to do with awareness and co-ordination rather than with the extent of provision; the delivery of training and business support often needs a proactive approach.

Business Link provides a signposting service to the range of business support available including grants, training, advice etc. They are also in a position to identify gaps in support. TNF stakeholders, notably the DMPs, should also be able to point local tourism operators (and ancillary front line services such as retailing and transport) to these services¹².

Significant funding is available for post-16 education and training but historically this has not been well applied in the tourism sector and there have been both gaps and overlap in provision across the sector. The funding that is available therefore is often not being harnessed in a coordinated or focussed manner.

Given the scale of TNF's local tourism sector, identified training needs are probably best co-ordinated and delivered at a (sub) regional level by the relevant agencies. The first step, however, is the training needs awareness review.

Any subsequent training initiative in TNF should involve tailoring the type, duration and location of training on offer to the specific needs of small tourism enterprises,

¹¹ As identified by People 1st in its National Skills Strategy for the Leisure, Hospitality, Tourism and Travel Sector, *'Raising the Bar'*.

¹² Leicestershire Promotions, for example is looking to provide professional customer care training for taxi drivers.

such as flexible short courses (including distance learning) and on-site training. There would also be benefit in bringing business people together to discuss common interests, problems and solutions.

6.3.2 Improve the appeal of jobs in local tourism

As the destination matures, the aim should be to increase the pool of local people keen and able to take jobs in tourism. Actions to pursue include:

- Helping to improve business performance which of course directly affects pay and conditions.
- Encouraging a flexible approach to sources of local labour, including older people and inactive workers.
- Addressing practical barriers such as transport to work.
- Addressing the continuing poor image of the industry in the area, through PR and work with school and college careers services.

There is also a need to raise awareness of tourism amongst local residents and businesses. This will not only enhance information dissemination to visitors but will also help raise awareness of business opportunities in the industry. A 'Tourism Awards' scheme might be developed as part of this campaign to highlight local products and good practice in tourism business.

Action Point:

22. Prepare a tourism awareness campaign for local businesses and residents – including schools and colleges

6.4 Strategic objective 4: Stepping up the marketing of the Forest

In strategic terms there is a need to both facilitate the promotion of individual products and themes and raise the profile of TNF. The priority in the short-term should be the former.

Marketing activity should always refer to the core values of TNF but focus on the defined targets and related products in and around the Forest, subject to availability at the right quality (particularly accommodation) at each point in time. The marketing of TNF has been achieved through the excellent partnership work of The National Forest and Beyond team. It is important to continue to promote TNF as well as the surrounding area in order to offer a diverse and more comprehensive product.

There should be a framework for marketing at different levels by different agencies, avoiding overlap and encouraging mutual reinforcement.

6.4.1 Define the target markets

The existing visitor markets in TNF include day visitors from within the Forest and surrounding areas and a small proportion of staying visitors from the same areas - and further afield. In profile terms they include non-discretionary business visitors and those visiting friends and relatives. Discretionary leisure visitors are predominantly the older empty-nesters and younger families, predominantly day visitors from the local area.

The ambition is to grow the existing discretionary and non-discretionary markets (volume, length of stay and particularly value) and broaden that range to include

young adults as appropriate new facilities are developed. Target markets for the future are summarised in Table 6.1.

Table 6.1: TNF target market segments

Segment	Origin	Typical profile
Day visitors		
Families	Regional (c1 hour travel)	Family groups, all SEG groups (parents/grandparents) with children <16. Travel by car or bus to attractions or some outdoor activity
Empty nesters	Regional (c1 hour travel)	<ul style="list-style-type: none"> Couples, all SEG groups. Travel by car or bus to attractions or tour (or some outdoor activity) Special interest groups
Young adults	Regional (c1 hour travel)	<ul style="list-style-type: none"> Couples, doing outdoor activity Groups, doing outdoor activity School groups
VFR	National	Friends and relatives visiting local residents and taking a local trip out or attending function
Business visitors	National	<ul style="list-style-type: none"> Independent meetings with local companies Day conferences, training sessions
Staying visitors		
Families	Regional (<3 hours travel)	Family groups, (parents/grandparents) with children <16, short breaks in serviced and s/c accommodation, mainly ABC1. Travel by car but may make use of alternative transport in TNF to access attractions and activities.
Empty nesters	Regional (<3 hours travel)	Couples, ABC1, staying in serviced accommodation. Travel by car but may make use of alternative transport in TNF to access attractions. Independent groups and packaged by commercial sector.
Young adults	Regional (<3 hours travel)	<ul style="list-style-type: none"> Couples, travel by car but may make use of alternative transport in TNF to access outdoor activities, staying in serviced or s/c accomm. Groups, doing outdoor activity. Travel by coach to and around Forest, staying in hostel or s/c or serviced accommodation
VFR	National	Friends and relatives visiting local residents and taking local trips or attending functions, staying with residents or in commercial accommodation.
Business visitors	National	<ul style="list-style-type: none"> Independent meetings with local companies, requiring overnight stay in serviced accomm. Training sessions requiring overnights.

This choice of segments is based upon:

- The existing volume of non-discretionary VFR and business trips.
- Matching the leisure product offer to known segments (existing and aspirational).
 - Families should be attracted by the range of rural, outdoor activities, events and educational attractions.
 - ABC1 empty nesters have high disposable income, are frequent break takers and should also be attracted by the accessible outdoor recreation product.
 - Young adults in groups (stag/hen parties, schools) from the surrounding conurbations should be attracted by the range of accessible, active pursuits.

- Day visitors of all ages and life-stages from the surrounding urban areas should be attracted by the range of events, outdoor activities and natural heritage.

The marketing plan needs to address these different target groups with their distinct needs and expectations.

6.4.2 Develop a marketing framework

A framework marketing plan should be prepared to clarify, rationalise and co-ordinate the overall marketing strategy and roles of the different agencies. This should include:

- A review of target markets.
- A review of competitors.
- Clarification of competitive advantages/USPs
- Etc.

The lead for TNF destination marketing should rest with the National Forest Company in partnership with the National Forest & Beyond partners or any new tourism body (see 6.5 below) working with, and co-ordinating, other local and sub-regional parties as appropriate. TNF should be looking for these other parties to add value to the NF&B's core role rather than duplicate their work.

The NFC or the new organisation should continue to prepare/review their ongoing promotional plan in the context of the overall framework. This should involve appropriate destination promotion and thematic campaigns. This will principally involve developing a small set of thematic and special interest offers (accommodation-led packages) working with a range of appropriate operators and/or intermediaries aimed at the target segments. Current opportunities, subject to further market research and consultation, include:

- Family walks.
- Family cycling.
- Water sports.
- Conservation holidays.
- Woodland arts and crafts.
- Food and drink.
- Other outdoor/forest activities.
- Events.
- Conferences and meetings.

In the medium to long-term, it may become appropriate to seek inclusion in other regional and national campaigns – and eventually international campaigns - (subject to the readiness of the region's infrastructure and products for such campaigns) and coordinate input to them from local partners.

Action Point:

23. Prepare marketing framework with other tourism marketing agencies and review promotional plan on regular basis (ongoing)

6.4.3 Strengthen the destination brand

The lack of awareness of TNF is an identified weakness. The priority should be to facilitate the promotion of individual Forest-related tourism themes e.g. walking and

the better known products such as Conkers, Rosliston, NMA, Snibston, Calke Abbey. Having attracted the visitor to one of the iconic attractions or key activities, the tactic should be to encourage further exploration of the Forest on that trip or a subsequent one - ideally making use of local trails or public transport. TNF should also embrace and promote selected, tourism facilities i.e. key attractions around TNF that will draw visitors to the general area - and nearby accommodation that can service activities within TNF.

The National Forest brand should be maintained and developed, placing increased emphasis on the quality of the natural environment, the maturing forest and the range of activities available. The ultimate aim should be to raise the profile of TNF to that of, say, an informal National Park, a countryside destination that features the ultimate range of outdoor activity in an attractive environment, supported by the necessary tourism infrastructure.

Advertising, media work, print and websites associated with the destination should promote and reinforce the Forest brand, acting as a 'drip-feed' to raise profile in the short to medium term, prior to any more significant brand awareness campaign. All stakeholders should be encouraged to subscribe to this approach in a consistent way including individual operators, who will reinforce the message on their sites, as well as DMPs which should support marketing of TNF as a destination, rather than break the area down in a county-based approach. This would have greater impact to promote the Forest as a cohesive destination and make more sense to the visitor.

Special, forest-themed events e.g. the Wood Fair will have a particularly important role in profile-raising as they attract visitors who might not otherwise have come into the area and will hopefully encourage them to return.

Another important tactic will be the need to keep guide book editors abreast of development of the Forest as a destination.

Action Point:

24. Develop the destination brand concept and encourage its use by all stakeholders (ongoing)

6.5 Strategic objective 5: Working together effectively in the Forest

Partnership working is a key principle of the Vision. TNF tourism resources are limited and the approach to tourism development and promotion has always been to rely upon working in partnership in order to meet its tourism goals. This approach has worked well during the formative stages of tourism development but may become limited as the product matures, the profile grows and local aspirations become more ambitious. Whatever structure is in place, the management of tourism is reliant on good information.

6.5.1 Establish an appropriate organisation for tourism development in TNF

Given the complex and overlapping organisation of tourism in TNF at present, there is a view that a rationalised, more formal approach to tourism development and promotion with clear responsibilities for stakeholders is, or soon will be, required for TNF if the full Vision is to be brought to fruition. The second issue is that there is no clear vehicle at present for the private sector to support or influence tourism in TNF.

A clear lead organisation – with adequate resources for its role - is needed to promote tourism and the brand in TNF and act as a focus and voice for the local industry¹³. In the medium term, this organisation might grow to develop and facilitate events, collaborate with the arts, sports and heritage sectors, initiate and facilitate product development priorities, act as a gateway to other services e.g. Business Link and monitor impacts.

There are several alternative approaches that may be considered:

1. Maintain the status quo. The NFC could continue to facilitate strategic thinking via a formal National Forest Tourism Working Group and generic marketing via the National Forest & Beyond partnership with support from the DMPs, local authorities and others.
2. The NFC, as the only body representing the Forest as a whole, could take on a more pro-active role to stimulate a higher profile combined approach to tourism and access/recreation development and promotion, garnering more support and resources from within the NFC and existing stakeholders.
3. The NFC facilitates the establishment of a free-standing 'arm's length' destination marketing organisation with shared resources and responsibility from all existing stakeholders, a new body with a new remit. In the short term, the priority would be just marketing. In the longer term, it could take on other responsibilities.
4. One of the existing stakeholders takes over responsibility for tourism across TNF (a variation on Option 3). This could be one of the existing DMPs doing this as a discrete contract/project for the whole Forest area, or one of the districts taking on a more pro-active tourism role via an independent unit. Either option would require other stakeholders to commit resources (staff, cash) outside their usual jurisdiction e.g. a local authority committing its tourism resources to the promotion of tourism across TNF on the basis of 'strength in scale'.

The district and county authorities retain a very important, if sometimes unheralded, role in tourism. They are responsible in large part for the quality of the destination through the maintenance of public services and infrastructure, enhancement of the built environment and support for various cultural activities (as well as visitor marketing for those local authorities involved in The National Forest & Beyond partnership). It will be important for any new body to work closely with the local authorities, establishing a clear division of responsibility, maybe establishing service level agreements or local and multi-area agreements.

This co-operation - and funding - must also include the private sector. A specific aim should be to involve more of the local industry as participants in any activity which will require it to:

- Raise the profile of the organisation in the local industry through good communication, promoting its role – and achievements.
- Link destination marketing (and any other service) to membership.
- Maintain communication between the organisation and members through the dissemination of research and other information and create networking opportunities perhaps through establishing sector groups.
- Embrace a wide range of enterprises as members including catering and retail outlets and other visitor services.

¹³ The operator survey found that 71% of operators felt TNF was important or very important in attracting visitors.

The corollary of a membership organisation will be the need for the new body to understand members' needs and represent them when developing future policy and action.

Under each of the organisation scenarios there will be a need for a more formal Working Group or Board. This should involve senior representatives from the 'core' stakeholders; NFC, the private sector (from the National Forest & Beyond Partnership), the local authorities, the DMPs, the RDAs and Business Link. The first task of the overarching Working Group will be to consider the future organisation of tourism but, in the meantime, sub-groups could be established to take responsibility for the individual action points e.g:

- Marketing Sub-group: NFC, LAs and DMPs
- Development Sub-group: NFC, DMPs, LAs (planners), RDAs
- Industry support Sub-group: NFC, Business Link, LAs, DMPs

Leaders for the individual project should be chosen from within each sub-group. Other interested parties can be brought on board as required e.g. British Waterways, Community Groups, cultural agencies and individual operators.

Resources are likely to become more constrained in the short to medium term. Public sector funding is under ever-increasing pressure, (sub) regional support structures may well change and the economic circumstances are likely to impact on S106 funds and private development. Under any scenario, the priority will be for stakeholders to co-operate and work together, making their own resources go further.

Why is it necessary to co-ordinate tourism?

Without strategic intervention, individual stakeholders work to develop and promote themselves in isolation, thereby limiting the overall potential of the area in growing the value of the visitor economy through a wider offer. Experience shows that whilst the private sector may come together to promote, this is self-selecting and does not always represent the best of the destination. Stereotypical images of the local area persist if nothing is done and tourism promotion is one way in which to showcase TNF and tell the world what the area is like and what it has to offer. This can help to counter preconceptions and positively sell the Forest. Intervention is therefore required to ensure that the sector is aligned behind the Vision and that tourism marketing supports the growth of TNF brand.

The options referred to above raise a number of issues for stakeholders. Choosing the right mechanism(s) will require considered debate amongst stakeholders bearing in mind resources and wider policy commitments to tourism.

Action Point:

25. Review options for the organisation of tourism in TNF

6.5.2 Monitor visitor satisfaction, enterprise performance and tourism impacts

The NFC has undertaken surveys of visitors and measures economic impact. This needs to become a systematic monitoring of visitors, tourism enterprises and their impacts. Action should include:

- A regular visitor survey, covering visitor profile, activities undertaken and degree of satisfaction with the destination and with individual services.
- A survey of tourism enterprises, covering occupancy or visitor numbers, business trends, perceived needs and concerns.
- An economic impact assessment.
- Environmental impacts as required.

- Individual monitoring of marketing campaigns and training initiatives.
- Awareness surveys of TNF and comparators.
- Encouragement to local operators to co-ordinate and undertake their own customer profile and satisfaction surveys using consistent survey techniques.

Information obtained in this way can be used in measurements against performance indicators as described in Section 7 of this strategy.

Information on performance of the sector in TNF, collected as outlined above, should be supplemented with other research material available from Visit Britain and other national and regional agencies. It may be appropriate to commission additional market research specific to the needs of TNF e.g. research on target segments and/or brochure enquirers who did not convert.

All this information and knowledge should be effectively disseminated to members and/or the local tourism industry.

Action Point:

- 26. Establish benchmarks, agree performance indicators and set appropriate targets**
27. Establish and implement research programme every 3 years

6.6 Summary of action plan

In the following tables, we summarise the 27 Action Points required for the implementation of the Vision and identified under the preceding Strategic Objectives. Together, they represent a challenging agenda in financial and human resource terms but it is important to note that:

- Nine of these actions are already the responsibility of various other stakeholders, all of which are ongoing e.g. the private sector upgrading of accommodation and attractions, the public agencies working on environmental improvements of towns (these actions are shaded in Table 6.3); the direct action required by the TNF tourism organisation is advocacy for these initiatives, each of which will support tourism development in TNF. As such, the commitment should not be too onerous on the organisation.
- Of the actions that are the direct responsibility of the tourism stakeholders (18), four are on-going initiatives that do not necessarily need additional resources.
- The new actions (14) will create new demands and so priorities are important as are timelines. Some will extend over the full 20 years but many will need to begin over the next five years.
- Lead responsibilities (and resources) have deliberately not been included for each action point as they are likely to change over the plan period.

The Action Points are therefore annotated according to:

- Their priority: 1 or 2.
- Those stakeholders with an interest in the initiative (see abbreviations below).
- The timescale when action should begin: 1 - 5 years.

Table 6.2: TNF tourism stakeholders and abbreviations used in Action Plan

Core stakeholders to form new Board or Working Group (TWG) convened by NFC	
NFC	The National Forest Company - or any new tourism mechanism promoting TNF
DMPs	Destination Management Partnerships
LAs	Local Authorities (District and/or County Councils, including highway agencies)
RDAs	Regional Development Agencies
BL	Business Link
PS	Private sector representation
Individual stakeholders	
TAs	Training agencies
LSC	Learning Skills Council
CGs	Community groups
AS	Arts and sports bodies
BW	British Waterways
STW	SevernTrent Water
HoFF	Heart of Forest Foundation
NT	National Trust
NMA	National Memorial Arboretum
NR	Network Rail
TOs	Transport operators
ACT	Ashby Canal Trust
FC	Forestry Commission

These action points have emerged from the various elements included under each strategic objective which have, in turn, been distilled from the analysis of the existing product, market, organisation and policy context set against the market trends, drivers and potential scenarios that have been set out in the preceding chapters.

Table 6.3: Action Points

No	Action point	Priority	Responsible stakeholders	Timescale
Strategic objective 1: Developing a high quality, good value visitor experience				
1	Maintain, monitor and extend production and dissemination of tourist information	1	NFC, LAs, DMPs, PS	Ongoing
2	Develop a short 'local information' course, supported by familiarisation trips for key people who interact with visitors in their place of work	2	NFC, LAs, DMPs, TAs	Year 3
3	Review the strategy for information provision across TNF every 5 years	2	NFC, LAs, DMPs	Year 3
4	Work with highway authorities to review tourism signposting policy and provision of new branded signs	2	NFC, LAs, PS	Year 5
5	Prepare visitor accommodation market review, clarify planning policy and identify potential hotel and holiday village development sites	1	NFC, DMPs, LAs, RDAs	Year 1
6	Support the upgrading of visitor accommodation as appropriate, including the provision of meeting facilities	1	NFC, DMPs, LAs	Ongoing
7	Support the planning, development and maintenance of a Forest-wide network of public waymarked footpaths, multi-use and all-abilities trails and related services	1	NFC, DMPs, LAs, FC and other land owners, CGs	Ongoing
8	Support the maintenance and development of the canal network and related facilities and services, including the restoration of the Ashby Canal	2	NFC, LAs, RDAs, ACT, BW	Ongoing
9	Review the opportunities for new (and improved access to) high quality, sustainable outdoor activity facilities	1	NFC, DMPs, LAs, BW, STW, Individual land owners	Year 3
10	Prepare events strategy with view to identifying new opportunities. Review every 3 years	1	NFC, DMPs, LAs, CGs, AS	Year 1
11	Support the development of the Heart of the Forest and upgrading of the major gateway attractions	1	NFC, LAs, DMPs, HoFF, NMA, NT, FC	Ongoing
12	Co-ordinate the presentation and interpretation of TNF in all attractions	2	NFC, relevant attraction stakeholders, schools	Year 3
13	Review the opportunities for, and support appropriate attraction enhancement and new attraction developments at key locations	2	NFC, LAs, DMPs, LAs, RDAs, relevant stakeholders	Year 3 and onwards
14	Support initiatives to improve the quality and distinctiveness of catering and retailing in town centres and at attractions and events	1	NFC, LAs, BL, TAs, PS	Ongoing
15	Support TNF food/craft producers, fostering networks and promoting quality standards	2	NFC, PS, DMPs, RDAs, LAs, BL	Ongoing

Strategic objective 2: Enhancing the environment and infrastructure				
16	Plan and implement landscape and environmental improvements on key arterial routes including the A38 and A511 through TNF	2	NFC, LAs, RDA	Year 3
17	Support the development – and maintenance – of high quality urban environments in towns and villages with local themes including appropriate landscaping	1	NFC, LAs, RDAs, CGs	Ongoing
18	Support continual improvement of public transport provision for, and promotion to, visitors within TNF, linking gateway towns and attractions	1	NFC, LAs, TOs	Ongoing
19	Support new public transport initiatives that will improve access for visitors travelling to TNF	2	NFC, LAs, RDAs, NR, TOs	Ongoing
20	Engage with all tourism facilities (attractions and accommodation) to encourage and facilitate appropriate environmental management of their sites	1	NFC, DMPs, RDAs	Year 1
Strategic objective 3: Improving business practice and performance				
21	Undertake a training and skills needs analysis	2	NFC, PS, RDAs, BL, TAs, LSC, DMPs	Year 5
22	Prepare a tourism awareness campaign for local businesses and residents – including schools and colleges	1	NFC, PS, LAs, BL, DMPs, TAs, Schools	Year 3 and onwards
Strategic objective 4: Stepping up the marketing effort				
23	Prepare marketing framework with other tourism marketing agencies and review promotional plan on regular basis	1	NFC, LAs, DMPs	Ongoing
24	Develop the destination brand concept and encourage its use by all stakeholders	1	TWG	Ongoing
Strategic objective 5: Working together effectively				
25	Review options for tourism organisation in TNF	1	TWG	Year 1
26	Set benchmarks, agree performance indicators and set appropriate targets	1	TWG	Year 2
27	Establish and implement research programme	1	TWG	Ongoing

7. MONITORING AND REVIEW

7.1 Taking the strategy forward

This Vision is the first step in a process; it is not an output. It is a flexible framework for action by – and a reference point for - a range of stakeholders in the context of ever-changing circumstances and on-going initiatives. Therefore, although a five year Action Plan is involved, the overall Vision needs to be endorsed by each stakeholder after each party has reviewed their own contribution against the recommended action plan, and thereafter monitor progress. Stakeholders should endeavour to incorporate the vision for tourism into their own broader agenda e.g. Local and Multi-Area Agreements and Strategic Partnerships as well as the Regional Spatial Plans and emerging Local Development Frameworks.

Monitoring of the success of the strategy should take place against a set of performance indicators. This process will be assisted through data collection on tourism in TNF collected via the recommended surveys and the economic impact model.

7.2 Performance Indicators

The following performance indicators are suggested, which reflect the main thrust of the Vision. They could be amended and added to over time subject to resources and needs.

- Business performance:
 - Visitor trips, nights and spending in TNF – annually, broken down by visit type.
 - Serviced and self-catering accommodation occupancy – total annual average and indexed against regional or national averages.
 - Percentage of enterprises indicating that levels of business had increased over previous year (broken down by type of enterprise and type of visitor).
 - Percentage of visitor trips, nights and spending in England and/or the two RDA regions – annually, broken down by visit type.
- Seasonality:
 - Percentage of total nights spent that occur in third quarter (July, August September).
 - Serviced and self-catering occupancy in third quarter as a ratio of average annual occupancy.
 - Number of attractions and accommodation establishments open all year (base level to be established).
- Product offer:
 - Tree cover in TNF
 - Length of accessible, waymarked trails by type
 - Bedstock – annually by type.
 - Attractions, outdoor activities/centres and events – annually by number and type.
 - Restaurants – annually by number and type.

- New tourism development planning applications – annually by number and type and level of investment.
- New tourism openings – annually by number and type.
- New public transport routes and services.
- Business closures.
- Quality:
 - Percentage of visitors satisfied with the overall experience and services received (these could be listed).
 - Number of enterprises (by sector) participating in quality grading schemes, and distribution of grading levels achieved.
 - Benchmarked comparison between selected destinations in TNF and external comparators (benchmarking exercise to be initiated).
 - Number and range of accredited tourism related courses in or near TNF.
 - Local uptake of local tourism training courses.
- Sustainability:
 - Percentage of enterprises participating in environmental training programmes and in Green Tourism Business award or equivalent.
 - Percentage of visitors using public transport.
- Business development:
 - Number of new jobs created by enterprises.
 - Salary levels within a constant sample of representative tourism enterprises (based on survey every five years).
- Awareness and marketing
 - External awareness levels of TNF against comparator destinations including selected National Parks and AONBs
 - Cost per response to direct marketing activity.
- Participation:
 - Number of enterprises in membership of TNF&B.
 - Attendance at training courses and take up of advisory and support services.

Individual targets can be set for each indicator once benchmarks are established¹⁴.

7.3 Tourism funding options

Much of the tourism infrastructure related to the natural and built environment, transport provision etc requires public sector funding. For the foreseeable future, public sector funding is likely to be constrained and reduced in real terms. However, this is not necessarily going to pertain over the period of the Vision or even over the full period of the first Action Plan¹⁵.

¹⁴ By way of comparison, Leicestershire Promotions have set the following targets:

- 60% of the region's accommodation businesses in the national quality assurance schemes.
- 40% of the region's visitor attractions to sign up to the national code of practice and for 20% of attractions to sign up to the Visitor Attractions Quality Assurance Service.

¹⁵ In February 2009, the Environment Secretary announced a review of economic support for the rural economy working with the RDAs through the National Economic Council. There are now Rural Enterprise Grants available for tourism under the Rural Development Programme - in the West Midlands.

The main sources of public sector funding are therefore likely to be:

Table 7.1: Likely funding sources

Source	Area of activity
National Forest Company	<ul style="list-style-type: none"> • Changing Landscapes Scheme – Forest creation infrastructure. • Land acquisition – Forest creation infrastructure. • Programme Development Fund – visitor surveys, market research, Forest creation infrastructure and capital grants, recreation and access grants. • Tourism promotion and marketing budget (via TNF&B) for tourism and public transport links. • Financial incentive schemes to help develop new recreational routes and cycleways.
East Midlands Tourism	<ul style="list-style-type: none"> • Core funding to DMPs who, in turn, provide identified services. • Visitor infrastructure funding and business development. • RDPE for agriculture and environmental schemes.
West Midlands Tourism	<ul style="list-style-type: none"> • Core funding to DMP. • Business development. • RDPE for agriculture, landscape and environmental schemes but includes Rural Enterprise Grant scheme for rural tourism businesses that add value to accommodation, provide access to the natural environment, food & drink, activities, training, village renewal as well as grants for woodland owners
Local authorities	<ul style="list-style-type: none"> • Core funding for TNF&B • Development and management of Forest-related and other open space infrastructure including public rights of way and other trails. • Tourist information, data collection and dissemination. • Sports and recreation development funding and funding of their own leisure sites. • Bus Quality Partnership funding; development of cycle routes and safe routes to schools; promotion of public transport facilities and alternatives to the car.
Local and Sub-Regional Partnerships	<ul style="list-style-type: none"> • Visitor infrastructure/facilities funding from economic partnerships.
Business Link	<ul style="list-style-type: none"> • Training. • Business support. • Business development. • Environmental management of businesses.
Forestry Commission	<ul style="list-style-type: none"> • Development and management of Forest-related and other open space infrastructure. England Woodland Grant Scheme and site development funding of their own woodlands.
Natural England	<ul style="list-style-type: none"> • Access to Nature and Higher Level Schemes.
National Lottery	<ul style="list-style-type: none"> • Heritage, arts, sports development funding.
Local groups	<ul style="list-style-type: none"> • Heritage, arts, sports, wildlife provision, access routes, leisure facilities.
Mineral companies	<ul style="list-style-type: none"> • Site restoration. • Landfill and aggregates tax funding.
DCLG and developers	<ul style="list-style-type: none"> • Burton upon Trent and 6C's Growth Points – green infrastructure funding.

The private sector is responsible for visitor accommodation and services (retail, catering etc), some attractions and sponsorship. They also contribute to destination

marketing as well as their own promotions. Private sector funding will also be curtailed in the short-term.

7.4 Review of the strategy

The overall responsibility for co-ordinating the Vision and promoting its implementation by stakeholders rests with the NFC or its successor.

The NFC, working with stakeholders, should produce an annual review of progress against each of the numbered action areas, and of performance against the above list of indicators.

The Vision should be reviewed in 2013 when the Action Plan should be updated.