

The National Forest Visitor Research Project Summary 2007

For The National Forest Company



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Research

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1. Summary of Research Findings

This section of the report provides a summary of the main research findings carried out during 2007. In addition key conclusion and recommendation comments have been provided, which are subject to further discussion with The National Forest Company. The findings below aim to address the following key areas:

1. Raising awareness of The National Forest product and brand;
2. Attracting new markets to the area;
3. Impact of the gateway installation features;
4. Future development of overnight stays;
5. Future development of sustainable tourism theme.

The tourism visitor and enquiry research took place from March to December 2007. The research programme included six stages of research:

- 1350 face to face visitor surveys (with 610 surveys conducted pre-installation (Apr-May) and 740 surveys completed post-installation (Aug-Oct));
- 200 self-completion postcard surveys with visitors;
- 100 online enquirers surveys;
- CAMEO segmentation against enquirers;
- Two focus groups with local residents;
- Five visitor diaries with visitors.

This allowed us to collect a mix of quantitative and qualitative data from a range of visitors and enquirers. Section 2 provides a full summary of each of these methods and their outcomes.

The research findings may help support a future tourism action plan. We would suggest that the first priority set is raising the awareness of The National Forest brand and product.

Table 1: Summary of key research findings

Objective	Summary Findings	Comments and Recommendations
1. Profile of current and potential visitors		
Social grade and age of visitors	<p>Visitor survey results show that The National Forest attracts visitors from a mix of social grades. Around two thirds of visitors belonged to A/B/C1 social grades (66% Pre-installation and 66% Post-installation).</p> <p>The majority of visitors were predominantly aged 35 years and above (86%/ 83%). The highest proportion were aged 35 to 44 years (39%/ 36%). These results are in line with the general UK visitor market. As stated by Visit Britain those aged 35 to 54 years were more likely to go on holiday in the UK. The main reason for this may be the greater number of restraints for parents with children. Adults aged 16 to 34 years were more likely to holiday abroad¹.</p> <p>The online enquiry results showed similar patterns to the main visitor survey findings. Online respondents were from predominantly middle class groups (72%). Respondents were mainly aged 35 years and above (77%).</p>	<p>Visitor results reaffirm previous research that key visitor markets continue to be Caring Parents and Empty Nesters. These should continue to be key markets to target. Section 5 details the key motivations for each of these market types.</p> <p>In order to target these groups effectively consideration should be given to producing marketing materials which are reflective of these group types, for example:</p> <ul style="list-style-type: none"> • Reviewing the current NFC visitor guide; dedicated pages could be targeted at the Empty Nester and Caring Parent groups by including The National Forest activities which would appeal to them. • Looking for opportunities to be included in any regional or area partnerships' marketing materials which are targeted at these groups.
Origin of visitors	<p>The majority of visitors were from areas within or surrounding The National Forest area, with a third from Derbyshire (35%/22%), a quarter from Leicestershire (26%/30%) and a further tenth from the West Midlands (11%/7%) and Nottinghamshire (9%/7%). The Post-Installation phase (Aug-Oct 07) survey saw a further tenth from Staffordshire (13%).</p> <p>During Pre-installation stages a high proportion of visitors staying in overnight paid accommodation came from the West Midlands (17%) and South Yorkshire (14%). During Post-installation overnight visitors came from a wider range of areas. The East Midlands UKTS figures for 2006 show key areas of origin for overnight visitors to be the East Midlands (22%), Yorkshire (15%), the South East (12%) and the East of England (11%)².</p> <p>The online results show that over half of enquirers were from the East Midlands (34%) and West Midlands (19%). A significantly higher proportion of online enquirers were from outside of the Midlands region (at 47%, compared to 20% from the main visitor survey). Peak areas included the South East (10%), East of England (7%) and the North West (7%).</p>	<p>Within the key target markets identified above, it is important to consider which geographical areas the NFC want to target. To attract more overnight visitors the NFC may want to consider promoting The National Forest to regions outside of the East and West Midlands (from where people are more likely to come on a day visit).</p> <p>Taking into consideration distance and competition from other destinations such as Yorkshire and the Peak District, the South East and East of England may be potential areas to target. Further research could be carried out within these regions to look at what would appeal to these potential visitor markets.</p>

¹ Visit Britain International and Domestic Visitor Profiles 2007 document; p13: sourced from the Changing lives survey.

² East Midlands United Kingdom Tourism Survey 2006: Sourced from Visit Britain Market Intelligence website

<p>CAMEO segmentation</p>	<p>CAMEO UK classification Penetration Analysis results showed that The National Forest was seen to attract a high penetration of visitors from sub-categories 3C (Well-Off Older Couples & Families in Large Detached & Semis), 6F (Less Affluent Couples in Suburban Family Neighbourhoods), 4F (Mature Couples & Families in Mortgaged Detached & Semi's), 4E (Couples & Families in Modern Rural & Suburban Developments) and 3A (Wealthy Older Families in Spacious Suburban & Rural Detached & Semis).</p> <p>The National Forest/South Derbyshire enquirer database results showed higher penetrations with young people sub-categories 7E (Young Singles in Privately Rented & Housing Association Properties) and 7D (Young Singles, Couples & Students in Urban Areas), The National Forest visitor database findings showed a below average number of these groups actually visiting the area. These results suggest the young people markets are not markets The National Forest may want to target within future marketing materials or campaigns.</p>	<p>To fit in with Empty Nesters and Caring Parent groups The National Forest may want to consider continuing to target the following classification groups, which show above average penetration levels:</p> <ul style="list-style-type: none"> • 3C (Well-Off Older Couples & Families In Large Detached & Semis); • 3A (Wealthy Older Families in Spacious Suburban & Rural Detached & Semis); • 4E (Couples & Families in Modern Rural & Suburban Developments); • And 4F (Mature Couples & Families in Mortgaged Detached & Semi's). <p>Reasons for choosing these groups are that they are from higher social grades and therefore maybe more likely to stay overnight within the area. Also these are all key family groups.</p> <p>In line with Visit Peak District and Derbyshire target markets, The National Forest may consider targeting a new group:</p> <ul style="list-style-type: none"> • 5G (Older Couples & Singles In Suburban Family Semi's) <p>The targeting of this category may support the attraction of new Empty Nester visitors to the area.</p>
<p>2. Pattern of current visitors</p>		
<p>Type of visitor</p>	<p>The main visitor survey showed that visitors during both Pre and Post-installation phases of research were predominantly either local residents (45%/41%) or on a day trip from home (43%/47%).</p> <p>A lower proportion of visitors stayed on an overnight trip (11%/10%). These results are in line with East Midlands Tourism visitor results, with 9% staying overnight in the region³. Of those visitors staying overnight around two fifths stayed within The National Forest area (44%/42%). The length of time spent varied slightly according to the time of year. A higher proportion of short breaks i.e. 1 to 3 nights were undertaken during the April to May (81% and a mean of 2.92 nights) compared to August to October (71% and a mean of 3.70 nights).</p>	<p>These results support the NFC action to attract more overnight visitors to the area. As the short breaks market is becoming important in UK trip trends, one suggestion would be for the NFC to consider looking at opportunities to work in partnership with local DMO's and Regional Development Agencies and to be included in either UK activity themed short breaks or family friendly break campaigns.</p> <p>The Accommodation Review 2007/2008 currently being carried out should also provide further feedback on how to address encouraging more overnight stays within The National Forest area. Feedback from the main visitor research suggests that lack of awareness may be one reason for this. As stated in section 4,</p>

³Figures sourced from the East Midlands Tourism Strategy 2003 to 2010

	<p>The Visitor Diary results completed at Rosliston Forestry Centre highlighted how awareness of accommodation remained low. Visitors were unaware of log cabins and campsite facilities on the site. These findings suggest there needs to be greater promotion with local residents and visitors of the accommodation on this site.</p> <p>The online survey results further supported this with the main visitor survey results showing that The National Forest remains primarily a day visitor destination with 26% staying overnight.</p>	<p>raising the profile of The National Forest through PR could be considered a priority for the NFC. Secondly putting together themed packages which emphasise the unique qualities of The National Forest as well as targeting key market groups (i.e. Empty Nesters and Family groups) may be one way of doing this e.g. promoting log cabin accommodation to the outdoors Empty Nester market, or for family groups, promoting attractions with not overly expensive accommodation based within a forest location which is considered to be child-friendly. Opportunities to work with the Forestry Commission on their Forest Holidays campaign may be one way of developing this.</p>
Repeat visiting	<p>A high proportion of visitors were regular repeat visitors, with three quarters (78% Pre and 76% Post-installation) visiting on a yearly basis or more. A lower proportion of visitors were first-time visitors (10%/8%).</p>	<p>As above more could be done to attract more lapsed or first-time visitors to The National Forest area.</p>
Group Type	<p>Visitor results show that The National Forest attracts a high proportion of family parties to the area, with two thirds containing children (aged 16 years and under at 64%/65%). Fewer people visited alone (4%/6%), a high proportion were with a friend or partner. A total of 3% were part of an organised group during Post-installation. The average party size ranged from three to four people (mean 3.73 people and 4.0 people).</p>	<p>Both the party type and group type results emphasise the popularity of The National Forest as a family destination. As stated in section 1 this is a target market the NFC may want to develop and target further within its promotional materials.</p>
3. Barriers to visiting		
	<p>Both the online and focus group results show that lack of awareness was cited as one of the main barriers to visiting The National Forest.</p> <p>Online enquiry results showed that a quarter of respondents (26%) stated they were not aware of The National Forest before today and a further fifth (22%) stated they didn't know what there was to see and do in The National Forest area. Other key reasons for not visiting were linked to competition from other destinations, with a quarter stating they went elsewhere on holiday (26%) and the distance to travel (22%).</p> <p>For focus group respondents the main barriers to visiting the area included lack of awareness, not recognised as a defined area and competition from other destinations.</p>	<p>These findings support the need to extend the gateway project further into the wider Forest. Raising the profile of The National Forest both nationally and locally should be considered as a key priority. As mentioned in section 7, further investment could be made in a National PR campaign to publicise the unique activities and qualities of The National Forest with key visitor markets. This would not only attract visitors to the area but would also ensure local business and partners support the brand.</p> <p>Results indicate that there is also a lack of awareness over where The National Forest is located. Currently the front cover of main visitor guide does not identify the counties The National Forest is located within. Within The National Forest Company's current strap line 'The National Forest and Beyond' or under the logo, consideration should be given to including the area counties i.e. Derbyshire, Leicestershire and Staffordshire. This may help enquirers to identify with The National Forest area more.</p> <p>As a high proportion of visitors are often prompted to visit through a recommendation or word of mouth, the results indicate more</p>

		needs to be done to raise awareness of The National Forest destination with local residents. As mentioned in section 7 one suggestion would be to put more community projects or business partnerships in place to create greater ownership from local residents.
4. Awareness and perceptions of The National Forest		
Awareness levels of The National Forest	<p>Within the focus group research more in-depth discussions took place over awareness levels of The National Forest with local residents. For the majority of respondents initial reactions to the term The National Forest raised a number of questions. A number of comments were made about whether The National Forest contained any trees. Those who had low awareness levels were unsure of where The National Forest was and what it contained. When shown a detailed map of the area, a number of respondents from both groups were surprised about how large the area was and the number of attractions it contained.</p> <p>Face to face visitor results showed that around two fifths of visitors (44%) were unaware of The National Forest brand. Just under two thirds (59%) agreed that The National Forest is not very well known.</p> <p>Online findings with general enquirers also supported findings that awareness levels of The National Forest brand and destination need to be raised; two thirds of respondents (64%) agreed with the statement that 'The National Forest is not very well known'. Section 6 shows that the installation gateway features have made some progress to improve this.</p>	<p>As above, a number of initiatives could be put in place to improve brand and destination awareness. These comments suggest there is a need for a more collective approach from attractions and tourism businesses within The National Forest area, to support the development and awareness of the brand name and area as a unified destination. Suggestions include:</p> <ul style="list-style-type: none"> • Ensuring The National Forest logo is on all partner's promotional materials within The National Forest • Links to The National Forest on all partnership websites • Stickers and signs could be provided for National Forest businesses and organisations to put in prominent places • Interpretation notice boards at key attractions to help highlight to visitors that they are in The National Forest and to give information about the area • National Forest badges for front line staff to prompt both staff and visitors that they are in The National Forest <p>The National Forest Company should consider referring to other successful tourism partnerships such as the Hadrian's Wall Tourism Partnership and New Forest for examples of best practice initiatives as outlined in section 7.</p>
Perceptions of The National Forest	<p>The focus group research addressed local residents' current perceptions of The National Forest. Respondents had mixed opinions of The National Forest as a destination brand.</p> <p>Currently they ranked The National Forest lowest in terms of appeal due to their low awareness levels compared to the Lake District, Peak District, Yorkshire Dales and Eden project. However they stated that if their awareness of The National Forest were raised then potentially its appeal and reputation for lots to see and do would be raised. In terms of the environmental profile of The National Forest both the groups</p>	<p>Results confirm that The National Forest has a strong persona for the environment, lots to see and do and a place for rest and relaxation. These are all themes that should be continued in the future marketing of the area.</p> <p>However in order for The National Forest to become a leading UK destination and distinguish itself from other competitors, it needs to address how it defines itself. Clear messages need to be put in place to highlight its unique qualities. One suggestion would be that all core messages and values are linked to the Forest e.g.</p>

	<p>rated The National Forest on the same level as top brand destinations such as the Lake District.</p> <p>However a number of respondents, particularly from the Caring Parents group, did not feel The National Forest had the potential to meet the same profile or appeal levels as established destination brands such as the Lake District, Yorkshire Dales, Eden Project or Peak District. A number of participants also felt the profile of The National Forest was lower than local attractions such as Sherwood Forest, Rutland Water and Clumber Park.</p> <p>Strengths of the area for the Empty Nesters market were considered countryside, rest, relaxation and escapism. A strength for Caring Parents was the variety of attractions the area has to offer.</p> <p>Weakness included poor transport infrastructures, lack of accommodation, lack of cycle hire facilities and the lack of trees.</p>	<p>walking, cycling, wildlife and nature, whereas possible activities, attractions and business which do not emphasise the Forest values e.g. lakes or water activities are excluded. This may help to clarify partners' understanding of the brand and product, and to emphasise its importance.</p> <p>In line with section 7, to increase awareness of lots to see and do The National Forest Company may also want to look at the product development of popular types of activity such as walking, cycling and local produce. Suggestions include The National Forest walking trail and The National Forest cycle way. Consideration also may want to be made to balance these activities with the current strengths of rest and relaxation.</p>
5. Motivations for visiting		
Sources of information used	<p>The main visitor survey results show that local knowledge (57%/52%) and recommendation by friends and family (18%/25%) were main sources, which bodes well in terms of the high satisfaction levels of previous visitors. Online enquirers used a broader range of information sources by comparison. Their main sources included a general internet/search engine (33%), local knowledge (29%) or a National Forest publication (25%). Additional popular sources included a Tourist Information Centre (13%) and advert / article in a newspaper/magazine (10%).</p> <p>The research results above are in line with Visit Britain figures that previous experience (63%), advice from friends and relatives (61%), the internet (48%) and tourism brochures/accommodation guides (34%) continue to be the main sources of information when choosing a holiday destination⁴.</p>	<p>Results indicate it is important to continue to promote The National Forest through a range of information sources.</p> <p>As mentioned above, NFC website links should be made prominent on partners' websites so that access to information about The National Forest is made easy.</p>
Factors influencing holiday decision making	<p>Online enquirers showed a strong preference for physical scenery and landscape (4.5. mean), an area for unwinding and relaxation (4.5 mean), quality accommodation (4.1 mean) and wildlife and conservation (4.0 mean) as key motivations when going on holiday.</p> <p>The focus group research also went into more detail over what triggers influenced Empty Nester and Caring Parent markets on overnight trips. For Empty Nester markets relaxing, quieter, rural/countryside overnight</p>	<p>Online enquiry results indicate that The National Forest guide is currently being used by both markets. As results show that different triggers influence both day and overnight visits, separate marketing materials or themes should be considered for both day and staying markets. It is important that the visitor guide considers ways to encourage more day visitors to stay overnight e.g. with an activities itinerary. Alternatively marketing budget could be invested in other popular visitor guides within the area.</p>

⁴ Visit Britain International and Domestic Visitor Profile 2007 document; p16.

	<p>breaks with some accommodation comforts appealed. Caring parents' decision making was more complex. Children were the main influence on decision making. An area to unwind, relax and scenery were also important, however a destination with family/outdoors activities, variety of attractions and a safe environment were considered just as important. Caring Parents were also more cost sensitive.</p> <p>On a day trip Empty Nesters were mainly influenced by their hobbies and interests for day visits. Main triggers included heritage, walking and rural activities such as seeing wildlife and quaint villages. For Caring Parents things for children to do and a short travel time remained the main motivations for a day trip.</p>	<p>As mentioned in section 1, to encourage both Empty Nester and Caring Parent markets two separate marketing campaigns/themes may also need to be considered within current marketing material.</p> <p>The National Forest destination themes fit well with the Enjoy England rural escapes and relaxing breaks themes. There may be opportunities to link in with these marketing campaigns. However as mentioned above it is important for The National Forest to consider how it is going to define itself from other competitive and higher profile destinations. A stronger Forest brand definition may help to achieve this. Emphasising activities and experiences which are unique and Forest focused may be one way of developing this brand.</p>
<p>Activities undertaken</p>	<p>The main visitor survey showed the most popular activities undertaken included walking (67%/75%) and visiting attractions (61%/57%). When comparing 2007 with 2001, results indicate that visitors participated in a wider variety of outdoor activities, including walking (69%/75%), visiting woodlands (26%/24%) and wildlife/conservation (23%/19%) compared with 2001, where visiting attractions and children's activities dominated.</p> <p>The online survey results show that online visitors undertook a broader range of activities compared to the main visitor survey findings. Walking (75%), visiting attractions (51%) and eating and drinking (48%) were also popular. A high proportion had also visited woodlands (64%) and done sightseeing from their car (40%).</p>	<p>Walking and visiting attractions were key motivations to visiting the area; the NFC should consider continuing to develop and market these activity types further.</p> <p>The results show that there is a broader use of the activities on offer in The National Forest, which may be as a result of product and marketing development since 2001. This finding demonstrates the potential The National Forest has to attract more visitors to the area. Linking in with the concept of sustainable activities, the NFC may want to focus on future development of activities such as visiting woodlands, cycling, wildlife/conservation, bird watching and horse riding. Overall the NFC could develop unique experiences and packages which link to the Forest. An example package would be to create an outdoors forest survival day.</p>
<p>Places of interest visited</p>	<p>In terms of attractions visited, Twycross Zoo (81%/79%), Conkers (65%/67%) and Calke Abbey (64%/63%) were the most popular attractions visitors had used. Over half of visitors had also visited Snibston Discovery Park (52%/52%) and Staunton Harold Reservoir and Visitor Centre (53%/51%). Awareness and usage levels of other attractions in the area remained variable.</p> <p>Online visitor survey results show a slightly lower number of visits to attractions compared to the main visitor survey. The main reason for this may relate to the fact that the face-to-face survey took place in attractions and key gateway sites.</p>	<p>Further consideration could be given to putting partnerships in place, between sites with common target markets e.g. walking was high at Calke Abbey, Rosliston Forestry Centre and Sence Valley Forest Park, in order to raise the profile of sites and attractions in The National Forest. The design and promotion of linked walking or cycling trails may help to increase the dispersal of visitors around The National Forest. This could be one aspect which might help increase the unification of the product.</p>

6. Impact of the gateway features on awareness and understanding levels		
Awareness of The National Forest brand	<p>Overall the visitor survey results positively showed that brand awareness levels increased by 5% Post-Installation (from 51% to 56%). Significant increases were seen at the majority of gateway sites and from visitors living outside of The National Forest area (i.e. non-local residents up by 7% for day visitors and up by 8% for staying visitors). Results show that all brand awareness results remained higher than the control site of Calke Abbey (14%). Results strongly indicate that the increase in these awareness levels are a result of the gateway installations.</p> <p>As stated in section 4, results do indicate that awareness still needs to be raised with the remaining 44% of visitors who were unaware.</p>	<p>To continue with increasing brand awareness levels, section 4 provides suggestions on how local tourism business and partners can support this.</p> <p>Within each of the gateway sites the NFC may want to consider also promoting the brand on other site features such as staff uniforms, leaflets, guides and events; this might help to enhance this unified approach.</p> <p>Additional features could also be considered at other sites around The National Forest to increase awareness levels.</p>
Awareness of gateway sites	<p>Results show that awareness levels of the gateway sites remained fairly level Post-Installation. Conkers (87%) and Snibston Discovery Park (72%) remained the most well known sites. However some progress has been made on increasing the awareness levels of less well known sites, such as Sence Valley Forest Park (up by 6% at 31%) and Rosliston Forestry Centre (up by 4% at 36%). Considering that a higher number of visitors were lapsed or non-regular visitors and therefore less aware, we could argue that the gateway features have helped to increase these awareness levels.</p> <p>Awareness levels of the Ferrers Centre for Arts and Crafts slightly decreased (by 7%). This may be explained by the fact that fewer visitors were interviewed at this site.</p>	<p>As mentioned above, now that the installation products are in place further consideration could be given to putting product and marketing partnerships in place, to develop unique experiences of the Forest e.g. walking and cycling trails.</p> <p>The Sence Valley Forest Park site also still primarily attracts local residents. Results indicate that more could be done to attract visitors from a wider area to this site.</p>
Understanding of The National Forest Company Role	<p>Positively, the results show that there continues to be a high awareness amongst visitors of some key roles of the NFC, particularly in terms of planting trees (75%), enhancing and protecting wildlife (72%), encouraging public recreation (62%) and a forest in the making (59%).</p> <p>However when comparing Pre and Post-Installation results directly, a slight decrease can be seen in the understanding of The National Forest Company's role. One reason for this may relate to a higher proportion of lapsed visitors during the Post-Installation phase.</p>	<p>The understanding of the role of The National Forest Company might increase over a longer period of time, particularly with the high level of repeat visitors to the area.</p>

<p>Understanding of the of The National Forest and its size</p>	<p>The Post-Installation results, positively, indicate that the gateway installations have made some progress towards sites improving visitors understanding of The National Forest (51% agreeing Pre-Installation and 56% agreeing at Post-Installation stages). Sites with strong impacts included Snibston Discovery Park (up by 13% from 34% to 47%) and Rosliston Forestry Centre (up by 9% from 64% to 73%). Unsurprisingly, the 'control site' of Calke Abbey (where no gateway features had been installed) saw a decrease of 10% (from 36% to 26%).</p> <p>The level of understanding of the size of The National Forest remained fairly mixed for both Pre (21%) and Post-Installation (24%) results. Results were higher than those found in The National Forest awareness study carried out with the UK population in 2000, in which around 14% correctly rated the size of The National Forest⁵.</p> <p>Although a slight increase (3%) was seen Post-Installation, results varied considerably by site. Positively, increases in level of understanding of the size of The National Forest were shown by the results at both Conkers (up by 16%, nearly doubled) and Snibston Discovery Park (up by 5%). Results indicate that understanding of size may need to be developed at Ferrers Centre for Arts and Crafts (16%, down by 4%), Rosliston Forestry Centre (21%, down by 9%).</p>	<p>Level of understanding of The National Forest remains dependent on the type of installation, positioning of installation and type of visitors visiting each of the gateway sites. As stated above there may be a bigger impact over a longer period of time.</p> <p>Both the understanding of the role of the NFC and the size of The National Forest remained mixed. In order to continue with supporting this objective the NFC may want to consider its next steps now key product provisions are in place at the sites.</p> <p>One suggestion would be to integrate other sources of information provision on the site with the new installations e.g. site maps, leaflets, staff guided walks and events. Another would be to reinforce key messages in promotional materials e.g. visitor guides, marketing and advertising campaigns. This might help to support a more unified and consistent approach towards information provision and increase levels of understanding further.</p> <p>Consideration could also be given to continuing to make further improvements to signage around The National Forest area, views on which remained fairly level at a mean score of 3.0 (slightly agree).</p>
<p>Impact on length of time spent</p>	<p>When comparing the Pre and Post-Installation results, the average length of stay in The National Forest was seen to have increased by 11 minutes (from 3.18 hours prior to the gateway installations to 3.29 hours after the installation of the gateway features).</p> <p>By site, increases in the length of time spent were seen at Rosliston Forestry Centre (49 minutes), Sence Valley Forest Park (23 minutes), Conkers (9 minutes) and Calke Abbey (11 minutes). A decrease in time spent was only seen at Snibston Discovery Park (-35 minutes), which may be due to a higher volume of visitors. Ferrers Centre for Arts and Crafts remained fairly level (-1 minute).</p>	<p>Results do positively indicate increases in the length of stay by visitor. This may be partly due to the installation of the gateway feature. Other factors may also relate to the time of year surveys took place (i.e. August to October 2007) or activities participated in.</p>

⁵ Soused from NEM market research: National Forest Awareness Study 2000; p9

Usage of installation features	Analysis by site shows that the awareness and usage of certain features tended to be fairly mixed at each of the gateway sites. The usage of each of the three site features (seating, interpretation boards and external signage) all remained about the same or decreased slightly during the Post-Installation period compared to the Pre-Installation period.	Reasons for mixed usages levels may relate to a number of factors such as the interests of the visitor, activities participated or the weather.
Satisfaction of site features	Key sites where significant impacts seem to have been made include Snibston Discovery Park. At Snibston Discovery Park significant increases were seen in external signage (from 3.7 to 4.1 mean) and road signage (from 3.7 to 4.2). For sites such as Ferrers Centre for Arts and Crafts and Conkers, the impact of installations seems to have remained fairly level.	Results suggest that certain installations have had a greater impact on satisfaction ratings at certain sites compared to others. Reasons for lower rating are harder to determine and could be related to factors such as the interests of the visitor, activities participated or the weather.
7. Attitudes and appeal toward sustainable tourism		
Impact of sustainable tourism on holiday decision making	<p>The focus group research went into more depth on the impact of sustainable tourism on holiday decision making. On the whole both groups were aware and had concerns about the environment. However for the majority of respondents their concern for the environment was not the main motivator in their holiday or lifestyle decisions. Environmental activities were seen to be linked more with domestic activities.</p> <p>Results suggest that there is currently a low level of awareness and understanding among potential and current visitors about what green tourism and sustainable tourism means and why it is important. National Parks or Areas of Outstanding Natural Beauty were considered to have the strongest sustainable tourism personas. Sustainable / green tourism was seen to be part of visitors' expectation levels when visiting a destination but not a main motivator for visiting.</p> <p>The focus group results fell very much in line with the Sustainable Tourism qualitative study commissioned by England Marketing in 2007. This study states how environmental impact has become more main stream in recent years and may become more important in future holiday decision making. Currently some perceptions of being responsible were linked to having to pay additional costs and</p>	<p>Other factors such as activities, physical scenery, rest and relaxation were seen as more important motivators compared to sustainable tourism. Results suggested that green tourism as a marketing theme is targeted more towards a niche market. The NFC therefore may want to focus on forest activities, which encompass sustainable themes in order to meet visitor expectations.</p> <p>The sustainable tourism study commissioned by England Marketing in 2007 indicated that sustainability is becoming increasingly important in holiday decision making. It is important that these options are made easy to choose and do not impact on the cost, time or quality of a holiday. Further to this it is important to consider providing a range of sustainable alternatives; that information contains simple and clear language and is easily accessible; and assurances that these options are aesthetic and not for profit⁷.</p> <p>If green / sustainable tourism is an area The National Forest wants to become well known for, three key areas for possible development are: 1. Setting up good PR campaigns; 2. Looking at opportunities to work with business and partners to develop the greening product; and 3. Providing an education programme or using other awareness raising methods to make people aware of</p>

⁶ Visit Britain International and Domestic Visitor Profile 2007 document; p19

⁷ Visit Britain International and Domestic Visitor Profile 2007 document; p19

	neglect luxuries. Empty Nester markets and affluent pre family markets were more likely to pay more for environmental options ⁶ .	why it is important. Further details of these options are detailed below.
Appeal of greening / sustainable tourism theme for The National Forest	<p>On the whole current perceptions of focus group respondents were that The National Forest is an environmentally friendly place to visit. There was also an expectation that a number of green activities were already taking place. When asked if a high environmental profile would attract them to visit on a day visit or overnight break a number of respondents felt this was a niche market.</p> <p>For both the Caring Parent and Empty Nester groups there was a strong feeling that raising awareness of The National Forest brand and area was a higher priority. Suggestions for raising awareness included implementing more road and village signs, promoting The National Forest within attractions, re-branding the area, creating a hook for people to visit the area, raising awareness in schools and general advertising in publications and local tourism businesses and organisations.</p>	<p>The NFC needs to consider key greening promotional hooks or unique greening experiences with general market appeal. Bigger promotional marketing messages may include looking at national carbon-off setting partnerships with the British Airport Association where all trees get planted in The National Forest. Unique experiences may include having an area which represents all the types of tree grown in the UK, holding national wood craft events, holding a record breaking plant a tree event, or a world Conker tournament. Another suggestion would be to consider a high profile champion for the destination, such as Ray Mears. This might also help promote the unique qualities and sustainable messages about the area.</p> <p>As stated in section 4, The NFC should consider referring to other successful tourism partnerships which have aimed to develop a sustainable tourism product, such as the New Forest, Hadrian's Wall and Eden Camp. A number of business initiatives have been used such as the walking and cycling welcome schemes and green tourism kits. The New Forest for example have developed a number of initiatives such as the New Forest marque for eating out places which use local produce, a Green Tourism Businesses scheme, and the Green Tourism Leaf scheme which provides a discount to visitors who leave their cars at home. These initiatives help support local businesses and raise brand awareness. Eden Camp also provides a number of recycling facilities for visitors.</p>
Use of public transport	Driving a car (96%/93%) remained the main mode of transport for visitors travelling from their home during the Pre and Post-Installation period. Travel by cycle (2%), on foot (2%) and public transport (1%) remained lower during post-installation.	Results show that further encouragement is needed to persuade visitors to use an alternative to the car. However just over four fifths of visitors (83%) did state they would not be willing to use public transport more and therefore would continue to use their cars.
Willingness to support sustainable tourism	Visitor results for supporting future sustainable tourism initiatives were mixed. Positively just under three quarters of visitors (with 71% giving a 3 or 4 agree scoring) were willing to walk and cycle more. However over four fifths of visitors (84%) disagreed that they would be willing to use public transport more. A lower proportion also stated they would be likely to use environmentally aware accommodation (at 38%, compared with 32% who said they would not).	<p>The main visitor results suggest that there would be strong support for activity based sustainable activities.</p> <p>Awareness may need to be raised of the importance of using public transport and the benefits of environmentally aware accommodation.</p>

<p>Encouragements to become more sustainable</p>	<p>A number of suggestions were made in the main visitor survey on how to encourage visitors to be more sustainable. These included improving public transport information, cost of public transport and the provision of cycling and walking routes (26%/20%). Further comments were made about providing more information provision (3%/1%) such as signage for walks/ cycling, guided walks, demonstrations and adverts. Around a tenth (12%/10%) felt more recycling, dog waste and litter bins needed to be made available. A number of other suggestions were made including raising awareness of accommodation, local produce and improvements to paths, toilets, sheltered areas and planting more trees.</p>	<p>As the comments suggest, visitors appear still to need further information on how to support sustainable tourism initiatives e.g. links to public transport networks and information on walking routes and cycling routes/hire.</p> <p>Consideration could be given to enhancing public transport links, cycle hire provision and walking/cycle tracks between attractions. One suggestion is to work with local public transport companies to install bike racks or to develop The National Forest walking or cycling trail transport tickets. It is important that public transport links are made easy to use for visitors. To promote these schemes or trails consideration could be given to using local buses as a PR tool (i.e. advertising as National Forest buses).</p>
<p>Appeal of greening activities</p>	<p>Within the focus group results activities which were considered to have popular appeal for both groups included walking and cycling trails, buying local food/local goods and undertaking educational activities. Other activities which generated a level of appeal included conservation activities, local pay back schemes, planting a tree, staying in green accommodation, recycling waste and learning about local cultures / communities.</p> <p>Results indicate that on the whole greening activities appealed more to the Empty Nesters market compared with Caring Parents. Wildlife and conservation was considered a stronger motivational factor for a day trip by Empty Nesters. However for the majority of respondents greening issues did not impact on the decision making of a day or overnight trip. Although Empty Nesters' responses were fairly positive, results suggest that both markets need additional incentives to get involved and engage with The National Forest.</p>	<p>Greening and sustainable activities are one way of creating awareness, however activities would need to have creative input to make them appeal to a broader family market and encourage participation. It is also important that greening marketing messages are clear and easy to understand.</p> <p>To incentivise these greening activities one suggestion would be to put together a creative programme of greening events, activities and schemes. Examples may include; themed walks or trails relating to seasons, wildlife, nature, sounds; events with local artists; wood craft events; community/school performing arts activities; themed tree planting schemes e.g. for new born babies, where people can go back and watch their tree grow in a chosen area. This may support The National Forest to become recognised as a destination for fun, education and learning activities for families, schools, visitors and local communities. Price sensitivity and educational messages would need to be taken into consideration.</p> <p>A key strength of The National Forest is its position as a forest nature and wildlife educational tool. With the installation of the gateway project this could be used as a starting point to strengthen and raise awareness of The National Forest with local residents, where awareness is low. As stated above developing additional activities and events around this educational theme may help to generate greater community ownership.</p>

8. Overall satisfaction levels		
Areas for improvement	<p>In the main visitor survey a small number of improvement suggestions were made. These included children's activities, such as a play area/assault course and interactive indoor activities. A number of visitors also wanted to know about more outdoor activities including biking, bird watching, horse riding, walking and wildlife/conservation activities.</p> <p>Those who had visited The National Forest and completed a postcard survey, felt a number of improvements could be made to offering more activities for children, clearer signposting, seating in sheltered areas and more recycling bins / litter bins within various sites.</p>	Improving activities and facilities in these areas will continue to enhance the visitor experience.
Overall enjoyment levels	Positively, visitor results showed that the majority of visitors at Pre (92%) and Post-Installation (91%) phases agreed with statement B ('This site helped improve the enjoyment of my visit'). The majority of all the mean scores achieved by site at Pre and Post-Installation phases were level with or above the scores of the control site of Calke Abbey (84%).	Results show high satisfaction levels amongst visitors to the gateway sites and a high level of repeat visits. This bodes well for repeat visits in the future.
Future recommendation and repeat visiting	The majority of online visitors (95%) agreed with the statement that they would recommend The National Forest to friends and family. Also over three quarters (78%) stated they would make a repeat visit.	Positively the online findings indicate that there are high satisfaction levels amongst current visitors. As above this bodes well for repeat visiting.

2. Research Methodology Review

The main aim of the Awareness and Understanding study was to measure the impact of the gateway installations during pre and post-installation stages. Alongside this we also had the opportunity to test a set of research methodologies to assess their effectiveness within The National Forest destination. The table below provides a summary of each of the practical advantages and disadvantages of using each of these methodological approaches and conclusions on overall effectiveness.

It is important to note that as The National Forest is a developing destination, a number of partnerships and coordination of data collection is still being put in place. The overall sourcing of enquirer databases was limited. As a result traditional face to face survey research was the most effective method of collecting visitor data. As the table below highlights, with increased awareness and co-ordinated collection of enquirers contact e-mail and telephone numbers by partners and businesses, other online and telephone research methods could be more effective over time.

Please note that each method has been given a rating out of ten according to its effectiveness during this project.

Table 2: Overview of research method

Method	Advantages	Disadvantages	Conclusion	Effect Rating	Recommendation
<p>Face to Face Visitor Survey: Face-to-face surveys were undertaken from April to May and August to October 2007. Surveys took place at five gateway sites within The National Forest and at the control site of Calke Abbey.</p>	<p>Face to face surveys allowed us to target a robust and representative sample.</p> <p>Interviews are conducted by professional and experienced interviewers who probe and explain respond. As a result this method also allows for the great accuracy of answers from visitors.</p> <p>This method allows for a longer questionnaire to be used and a wealth of information to be collected.</p>	<p>Sites varied in their volume of visitor levels. This results in lower survey completion levels at certain sites e.g. Ferrers Centre for Arts and Crafts and a higher completion of surveys were completed at other sites such as Conkers and Rosliston Forestry Centre. As a result, sites are not directly comparable.</p> <p>Surveys took place at predominantly six attraction based sites, limiting opinions to these sites.</p> <p>This method was weather dependent and can be more costly in comparison to other methods.</p>	<p>The traditional face to face surveys were found to be the most effective method for capturing the views of visitors. Robust samples of 610 surveys were completed from April to May and 740 surveys were completed from August to October.</p> <p>However due to tight timescales on the project, interviews at Sence Valley Forest Park took place at a time where installations had not been installed.</p>	<p>9</p>	<p>In future surveys, for gateway sites with lower volumes of visitors, it might be important to consider additional interviewer days to ensure that sample sizes are comparable with other sites.</p> <p>As suggested in the table below, if a larger visitor survey was to take place within The National Forest, we would recommend using additional site locations and places of interest to gain a broader range of views e.g. popular walking trails.</p> <p>If a direct comparison of sites is needed, we would suggest that in future years' interviews take place during the same months i.e. Apr to May 07 and Apr to May 08.</p>

					To ensure visitors are surveyed throughout the year, supplementary self-completion questionnaires could be used in other locations, such as accommodation establishments, restaurants and TIC's.
<p>Online e-mail survey: A short incentive 17 question questionnaire was sent to 323 e-mail addresses during November 2007.</p>	<p>Allowed us access to target audiences and current visitors.</p> <p>Allowed us to capture the views of a broad range of visitors, who might have been undertaking specialist activities such as cycling and visiting a range of places of interest.</p> <p>Cost effective method for collecting comprehensive visitor data.</p> <p>Enquirers have a greater incentive to complete a survey as they have had previous contact with the NFC.</p>	<p>Dependent on database of e-mail addresses. Limited e-mail addresses were available. As a result low survey rates were achieved.</p> <p>As with all self-completion questionnaires, questions were open to enquirers own interpretation.</p> <p>This method excludes non-internet users.</p>	<p>Due to low level of e-mail address returns from the self-completion visitor postcard survey, additional partner databases were sourced for e-mail addresses.</p> <p>A shorter version of the online questionnaire was used. From the 323 e-mail address a total of 72 enquirers completed an online survey. This provided us with a 22% return rate, which is well above the 15% average return rate. Overall this method was shown to be very effective.</p> <p>Sample sizes however were still outside of robust 376 survey levels. This was mainly due to the lower proportion of e-mail addresses available from the self-completion postcard survey and partners. Data protection was the main barrier which prevented us from accessing some of the partners' databases. In total 442 e-mail contacts were sourced and 323 e-mail contacts were available after de-duping. Normally we would require around 3,000 contacts to get a robust 400 sample.</p>	8	<p>As stated in the online website survey, a shortened questionnaire was most effective for this method and this should be considered in future studies.</p> <p>We would recommend that partners work together to improve the access to, collection and quality of their enquirer databases. This may be an action to follow up with East Midlands Tourism or Visit Peak District and Derbyshire. In future a higher sample of e-mail addresses would need to be sourced to achieve a robust sample.</p>

<p>Focus groups: Two focus groups were conducted with Residents within The National Forest during July 2007. One group was completed with Empty Nesters and the second with Caring Parents. A mix of visitors and non-visitors took part.</p>	<p>This method provided us with greater depth and detail to visitor survey responses. Overall a greater understanding was achieved of potential visitors' opinions.</p> <p>Focus groups also allowed us to explore wider project objectives.</p>	<p>This method is fairly subjective. As the research was based on only two groups (i.e. 16 respondents) we can not guarantee that these views were representative of other residents or target markets.</p> <p>This method can be more costly to do.</p>	<p>This method was very effective in providing us with an insight into current awareness and perception levels of The National Forest by local residents. Useful feedback was also provided on possible areas for improvement.</p>	<p>8</p>	<p>In order to gain a more comprehensive understanding of potential visitors opinions, we would recommend that a minimum of six focus groups are undertaken. This may include focus groups with day visitors and overnight visitors in target areas such as East of England, the South East, Nottingham and the West Midlands.</p>
<p>Visitor diary: Five incentivised visitor diary surveys were completed by five visitor groups to Rosliston Forestry Centre during October 2007</p>	<p>A more in-depth insight and evidence of experiences to Rosliston Forestry Centre was gained.</p> <p>This method allowed for more specific feedback on improvements to a site.</p>	<p>This method however was limited to only five visitor responses. We can not guarantee that these views were representative of other visitors.</p> <p>Visitor diaries can be more costly and time consuming to conduct.</p>	<p>This method provided a more qualitative approach towards the visitor experience. It was found to be very effective in addressing quality and customer satisfaction issues.</p> <p>Visitors were happy to take part in the process.</p> <p>Overall this approach allowed for a greater understanding of experiences and areas for future improvement.</p> <p>However the comments produced were site specific and results cannot be related to the wider National Forest.</p>	<p>6</p>	<p>We would recommend that this method be used to supplement future visitor surveys at specific sites or places of interest which are looking to improve.</p> <p>Consideration should be given to having five to ten diaries completed at any one site, so as not to impinge on visitors' visits.</p>

<p>CAMEO Market segmentation: Further profile analysis was carried out on enquirers and visitor postcodes.</p>	<p>Useful to identify current customer demographic profiles.</p> <p>Cost effective method for carrying out market segmentation analysis.</p>	<p>CAMEO market segmentation data is limited to secondary profile data. There is no information on product or value based data, such as activities or attitudes.</p>	<p>A range of postcodes were sourced from the main visitor survey and holiday guide enquirer databases.</p> <p>This analysis allowed us to identify key demographic markets to target within future marketing materials and campaigns.</p>	<p>5</p>	<p>This is a useful method and allows for comparisons to be made with Visit Peak District and Derbyshire enquiry profile segments.</p> <p>Visit Peak District and Derbyshire are also having additional segmentation analysis conducted for the whole area. It will be important to liaise with them over key Visit Britain Arkleisure segments.</p>
<p>Self-completion Postcard survey: A total of 5,000 postcards were distributed from June to October 2007 to 15 attractions and sites across The National Forest.</p>	<p>This self-completion method allowed us direct access to visitor markets.</p> <p>With limited enquirer databases currently in place, this method allowed for the supplementation of contact details, e-mail addresses and feedback comments from visitors.</p>	<p>Reliant on support from attractions and sites.</p> <p>Reliant on the commitment from visitors to complete.</p> <p>Reliant on visitors to interpret the postcard questions and understand the purpose of the research.</p> <p>Time consuming research method to manage.</p>	<p>In total 200 postcards were returned. Only a 4% return rate was achieved, which is below the 10% average self-completion return rate. From these 200 postcards, 50 respondents provided us with e-mail address for the follow-up online e-mail survey.</p> <p>Ashby TIC achieved the highest self-completion rates. Feedback from Ashby TIC highlighted how part of their success was down to a 'listening week'. Staff engaged with visitors and asked them for feedback on suggested changes and improvements to The National Forest.</p>	<p>4</p>	<p>This method needs greater commitment from attractions and sites to promote postcards to visitors. As with other self-completion surveys, such as the occupancy survey, a lot of additional time would need to be invested to make this an effective means of collecting database contacts. If used in the future greater incentives may need to be considered to encourage attractions and businesses to take part e.g. summary reports.</p> <p>Other suggestions include:</p> <ul style="list-style-type: none"> • Greater incentives for staff to hand out postcards. • Recruiting volunteers to hand out postcards and get completed postcards. <p>Continuing with this method might be one way of increasing database records. It also provides a co-ordinated approach to collecting data.</p>

<p>Online Website survey: An incentivised website survey was set-up on the main National Forest Company website. The survey ran from July 2007 to December 2007.</p>	<p>Allowed access directly to enquirers markets.</p> <p>Cost effective method for collecting comprehensive visitor data.</p>	<p>Enquirers were less engaged. This method is dependent on enquirers to complete web survey. As some enquirers may have had no previous personal contact, motivation to take part is lower compared to other methods.</p> <p>The long length of the questionnaire was found to reduce completion rates.</p> <p>As with all self-completion questionnaires, questions were open to enquirers own interpretation.</p> <p>Limited to one website.</p>	<p>Past experience with online surveys has shown them to be an effective method to collecting enquirer data over a period of time. However, low completion rates were achieved with this method, at 28 surveys. Sample sizes were outside 376 robust sample levels.</p> <p>The questionnaire length was seen to have some negative impact on completion rates. The questionnaire was reduced from 29 questions to 17 questions to aim for a higher completion rate. However this had a limited impact.</p> <p>The visitor survey link was set-up at the bottom of the home page and could have been more visible.</p>	<p>3</p>	<p>For future research we would recommend that the web survey link is put in a prominent place on the website and that links to the survey are not only put on the main home page but also the visitor guide/information page.</p> <p>During previous web-surveys links have been set-up on additional partner websites. If this method is used in the future we would recommend that links are put on additional partner websites such as East Midland Tourism, South Derbyshire District Council, Leicestershire Promotions, Destination Staffordshire and Visit Peak District and Derbyshire. Results in turn could be shared with partners.</p> <p>Web-surveys could also be set-up over a 12 month period, allowing for possible higher completion rates.</p> <p>As the research has shown we would further recommend that web-surveys are no longer than 10 to 15 questions in length.</p>
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3. Research Audit

Within any research audit it is important that we look to identify information on the key destination research themes. These key themes are outlined below:

- Value and volume of visitors to the area
- Profile and patterns of visitors to the area
- Image and perceptions of the area
- Visitor product experience
- Target markets and potential markets
- Unique selling points of the area
- Impact and testing of current marketing materials and branding
- Future areas for product and market development/improvement

Reviewing the research available against the above themes helped to inform the audit of research gaps and recommendations sections.

The National Forest 2004-2014 strategy (p82-83) outlines three additional areas of research undertaken within The National Forest prior to the 2007 Awareness and Understanding research study. These include:

- Economic Impact Study
- Benchmarking Visitor Research
- National Forest Awareness Study

Taking into account this year's studies and previous research we have carried out a summary audit of research themes and made summary recommendations for further discussion with The National Forest Company. A summary of these results is provided in table 3 below.

It is important to note however that within this review one of the main areas for improvement was in the development of enquirer databases and use of data protection terminology on all marketing campaigns in the area. As detailed in the East Midlands Tourism Strategy 2003-2010 (p50 and p78), this is a key objective for the region.

Table 3: Summary audit of research

Theme	Current Research	Audit Review	Recommendation comments
Value and volume of visitors to the area	STEAM economic model predominantly provides figures based on value and volume of visitors to the area.	STEAM Provides a good indication of the value and volume of tourists to the region. This method uses all the key information sources available in this audit. However these figures are based largely on secondary data. STEAM data is limited as it is based on estimates.	It is important to consider supplementing secondary data with primary visitor research results, such as visitor spend. This could be addressed within any future visitor survey research and incorporated into any STEAM figures to make them more robust.

<p>Profile and patterns of visitors to the area</p>	<p>Currently ad-hoc 2001 benchmarking and the 2007 face to face visitor surveys have taken place within attraction based locations at The National Forest.</p> <p>Awareness and Understanding online survey, website surveys and self-completion postcard surveys have also taken place in 2007.</p>	<p>Face to face surveys are the most effective way of collecting comprehensive visitor data. Thorough data has been collected on visitor profiles and patterns.</p>	<p>The face to face quantitative method should continue to be used as the main visitor research method. This information may be supplemented by self-completion and online surveys (web and e-mail) and supported by partners. A range of methods will also help to ensure visitors are interviewed throughout the year; Jan to Dec.</p> <p>As detailed in the NFC strategy 2004-2014 future visitor surveys are planned. Continued monitoring of visitors' profiles and patterns through a biennial survey should be considered, to support and inform future decision making.</p> <p>It is important to note that surveys have taken place at attraction based locations. Within any future area study a broader mix of locations might be considered.</p> <p>The NFC should look at any up and coming partner research opportunities such as any regional visitor surveys that might be taking place, to ensure The National Forest area is considered.</p>
<p>Target markets and potential markets</p>	<p>CAMEO segmentation analysis, online e-mail survey and visitor survey carried out in Awareness and Understanding research 2007.</p>	<p>Limited database information available on enquirers. Limited access to partner enquirer databases.</p> <p>No co-ordinated database process in place.</p> <p>Currently the visitor research in 2007 has provided further understanding of current visitor markets. However the information on enquirer markets remains more limited. Currently unable to establish fully the potential markets The National Forest should be targeting.</p> <p>There is also a lack of qualitative information on expectations, appeal and barriers to visiting The National Forest. As a result we are unable to understand fully how and which overnight markets The National Forest has the potential to attract.</p>	<p>One of the main areas for improvement is the development of databases. Clearer instructions could be put in place to encourage both local TICs, partners and attractions to take part.</p> <p>Examples include the use of data protection terminology in all marketing campaigns to enquirers. Key questions include: Are you happy for us or The National Forest Company to contact you again? / Or are you happy for us and The National Forest Company to retain you on our database records? This will allow partners or The National Forest Company to use e-mail or telephone details in future research.</p> <p>In addition systems need to be developed to allow database information to be collected easily. For example when people order a visitor guide online a screen could be set up to capture their e-mail and telephone details.</p> <p>More in-depth information may be required on potential enquirers to focus marketing and brand messages. Qualitative focus groups with both current and potential</p>

			<p>visitors, including a mix of both demographic e.g. South East, and attitudinal segments e.g. Empty Nesters and Caring Parents would be a recommended way of achieving this. Focus groups would allow us to establish what expectations and experiences are required from The National Forest. They could also scope up and test the appeal of unique experience marketing themes.</p> <p>We would also recommend that The National Forest Company look to liaise with Visit Peak District and Derbyshire on their Visit Britain Arkleisure segments. This will help to inform future target markets for the area.</p>
Visitor product experience	<p>2001 Benchmarking face to face surveys</p> <p>2007 Awareness and Understanding Visitor survey</p>	<p>Visitor surveys have provided useful information on popular activities, places of interest, attitudes towards sustainability and visitor satisfaction levels.</p> <p>Further information could be captured on key motivations i.e. product and marketing themes. This would also capture up to date information on the rating of visitor facilities and services e.g. accommodation and TIC.</p>	<p>Importance and performance customer satisfaction questions should be considered within future visitor surveys. This again will provide a greater insight into what current visitor markets expect and how The National Forest is performing against these expectations, in turn informing product development and decision making.</p> <p>Using these questions would also allow for a level of benchmarking to be carried out.</p> <p>Surveys could be carried out to target audiences at popular events.</p>
Image and perceptions of the area	<p>National Awareness Study 2000</p> <p>Awareness and understanding 2007 focus group research and face to face survey.</p>	<p>Comprehensive quantitative information is available on the public's and visitors' perceptions of the area.</p> <p>Limited qualitative information on perceptions and awareness. Limited information on enquirers and potential perceptions and awareness of the area.</p>	<p>As above and below.</p>

<p>Unique selling points of the area</p>	<p>The National Forest strategy 2004-2014 strategy</p> <p>East Midland Tourism Strategy 2003-2010</p> <p>Awareness and Understanding focus groups 2007</p>	<p>The strategy for The National Forest was put together in 2004. It is important that both businesses and stakeholders are consulted to assess progression in services and facilities in the area.</p> <p>Limited information on enquirers and visitors perceptions of the unique selling points of the area. This was addressed in the 2007 qualitative focus groups.</p> <p>Key unique selling point themes were addressed in the online website survey; however results were based on small sample sizes.</p>	<p>A telephone Tourism Business survey could be considered to assess product and marketing themes and general business progression and needs. This might be used to address future partnerships and product development needs within the area.</p> <p>Telephone research with enquirers and visitors to confirm top product themes to lead with in future marketing campaigns. This may inform future changes to the visitor guide. This could be addressed within a more comprehensive conversion research study as stated below.</p>
<p>Impact and testing of current marketing materials and branding</p>	<p>Branding research conducted in National Awareness Study 2000</p> <p>Awareness and understanding 2007 focus group research and face to face survey.</p> <p>Heart of England 2006 Conversion Research.</p>	<p>Limited up to date information on current views of marketing materials from potential and current visitors.</p>	<p>In order to remain competitive it is important to monitor, review and update marketing materials on an annual basis. The Heart of England conversion research has provided quantitative to measure the effectiveness of the guide. However further consideration may want to be given to conduct qualitative research with current and potential visitors markets, to review current marketing materials such as the website.</p>
<p>Future areas for product and market development/improvement</p>	<p>National Benchmarking research.</p> <p>2007 Awareness and Understanding Visitor survey and focus groups and self-completion postcards.</p>	<p>The 2007 research has provided more detailed information on key areas for improvement such as improvements to specific sites, development of activities and future marketing guidance.</p> <p>However as stated above, there is limited information on what appeals to potential visitors to encourage overnight visits.</p>	<p>As above a telephone survey with local tourism businesses and potential visitors may more fully inform product and market development areas. This would also allow us to identify more fully what would encourage potential visitors to stay overnight.</p>