



Tourism Growth Plan



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FOREST

WELCOME



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FOREST

Introduction

This is a tourism growth plan for The National Forest. It sets out an ambitious 10-year strategic plan (covering 2017–2027), for how we will realise the potential of the Forest as a visitor destination and how tourism will contribute to transforming lives, the landscape and the economy.

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

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

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

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

This Plan sets out what we need to do to realise our ambition.

All the businesses in the Forest will have its best interests at heart and value the role that tourism can play to support the vitality and sustainability of the Forest.

The ambition

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

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

In the next 10 years we want:

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

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



The journey so far

The first 25 years have been about building the destination. We've made great progress and there have been some impressive achievements in our first wave of investment. We've created the National Forest Way - a walking trail extending over 75 miles; enabled the Hicks Lodge Cycle Centre - a dedicated cycle hub for the Forest; and delivered a Youth Hostel and the award-winning attraction Conkers. And of course, we've planted millions of trees and the maturing woodlands now cover more than 20% of the land within the Forest.

But we still have a way to go to selling the collective National Forest as a destination and in creating a joined-up, consistently high-quality Forest experience.

Essence of the offer

The essence of the Forest offer is not necessarily about places but about the experiences and feelings of visitors.



A new way of working

To achieve our growth targets, we will:

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

Our visitors

There are around 10 million people living within 90 minutes of the Forest. That is an impressive catchment. It is important we are clear about the type of visitors we would like to attract.

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

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

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

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

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

Fun Families

- Urban living about an hour's drive from the Forest
- Parents in 30s/40s with kids under 10; some multi-generational groups
- Price conscious but comfortable
- After a good deal



Easy Active Adults

- Couples, 50+ empty nesters
- Financially pretty comfortable with disposable income to spend
- After a good deal



New Traditionals

- Couples and families spending time doing things together
- Wise spenders; pay for 'right' experience
- Believe in a healthy work-life balance
- Invest in improving environment and community, giving back



Special Interest Groups

- Couples and families spending time doing things together
- Visitors with a passion, hobby or specific interest e.g. runners, photographers, ramblers, cyclists, bird watchers
- That passion drives destination choice
- Visit at weekends & on holidays; weekdays if retired





Going for growth

A thriving tourism sector in the Forest needs:

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



Things to do

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

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

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

Case Study: Outdoor hub at Calke Abbey, Derbyshire

An inspiring example of an initiative designed to help people enjoy the outdoors is taking place here in The National Forest at Calke Abbey. Calke Abbey is a country house estate set in 600 acres of parkland owned by the National Trust. While the parkland can already be enjoyed by visitors, the National Trust is taking the bold move of developing a dedicated activity hub improving the outdoor experience and giving more reasons to visit for existing and new visitors.

Still at proposal stage (phase 1 is due to open in 2018) the plans include a sensitively designed new building, with a café, toilets and cycle hire. Outside there will be a new car park, outdoor seating, footpaths, cycle routes and outdoor recreation areas, including natural play areas and nature trails. In the longer term, there are

plans for a multi-use room for learning and education. The cycle route will create a circular 8km trail that joins with the existing Ticknall Tramway, making Calke Park more accessible for family and beginner cyclists. New footpaths will improve access to the parkland. Exactly the sort of thing we want to see in The National Forest.



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

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

What we are going to do

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





Case Study: Hunter Gather Cook, East Sussex

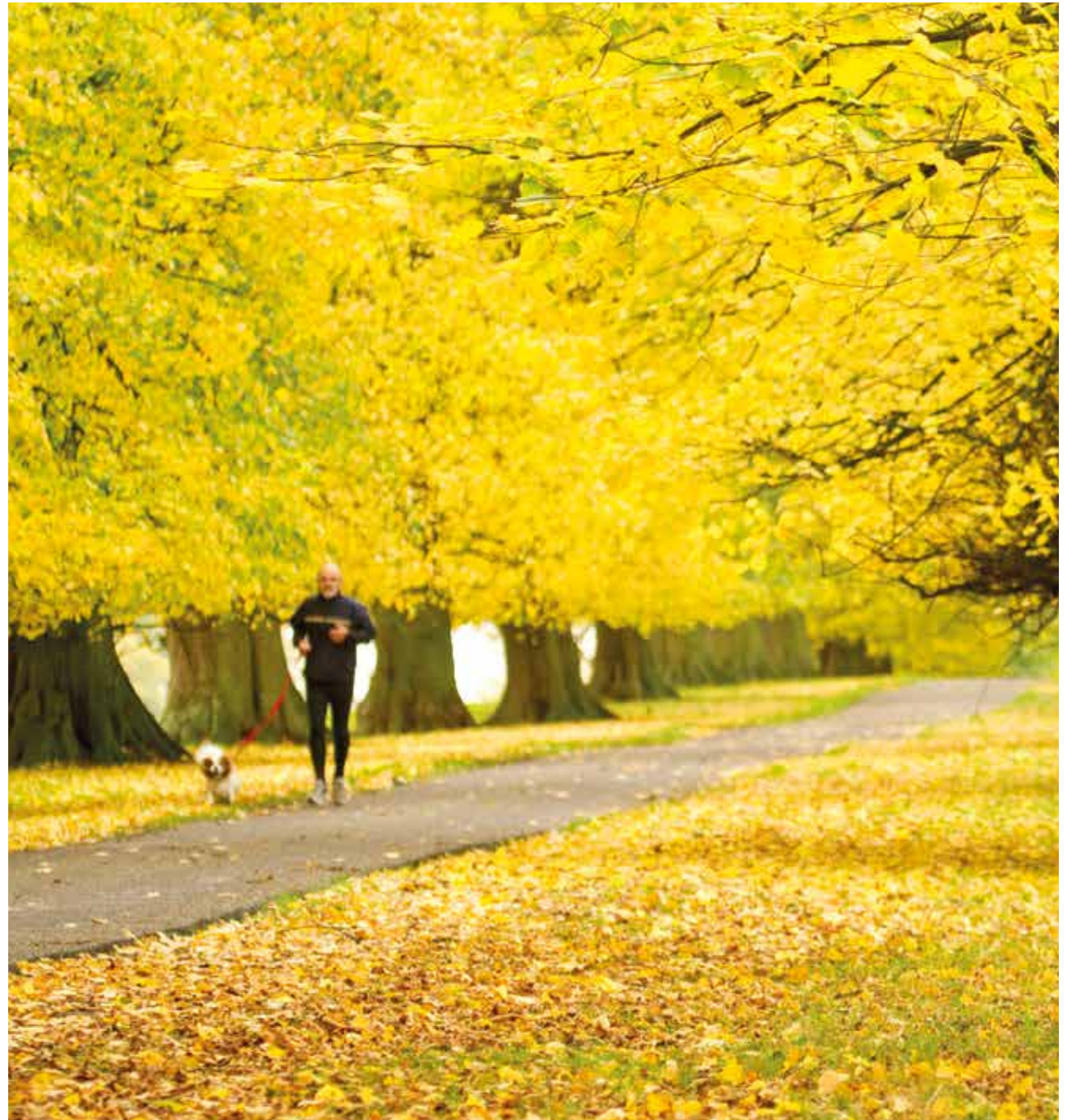
Tapping into – and stretching – the interest in foraging and paleo diets, Hunter Gather Cook is a cookery school with a difference. Operating from an off-grid tree house in East Sussex, the highly-experienced team organise foraging expeditions and outdoor cooking of the wild plants, fungi, fish and game gathered. Deer Butchery and Fire Cookery are their specialisms. All washed down with wild cocktails or wild brews.

Operating on two sites on the 40 acre broadleaf woodland farm, a variety of themed one day courses are available for individuals or groups. All are adults only, providing serious

learning opportunities from skinning rabbits to smoking fish to identifying mushrooms. Costs are from £120 per person. Courses are complemented by occasional pop-up wild banquets and presence at festivals including Camp Bestival and Wilderness.

Hunter Gather Cook is launching a second woodland site with Kew Gardens at Wakehurst Place in West Sussex.

Hunter Gather Cook reflects the creative use of the forest assets that we want to encourage. Hunter Gather Cook is the type of experience our New Traditionals are seeking.



Festivals

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

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

Festivals come in all shapes and sizes. We want to support many of the smaller events that are already happening. Where possible we want to bring them under the umbrella of the Forest brand to strengthen their positioning. That will help present a higher profile festival offer to our target markets, in a crowded festival marketplace. We want to see more and higher profile sports and endurance events taking place in the Forest too, building on what is happening already.

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

What we are going to do

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



Case Study: The Enchanted Forest, Perthshire

We want to use festivals as a way to creatively showcase the Forest, extend the visitor day and the visitor season. The Enchanted Forest shows how that can be achieved.

The Enchanted Forest has attracted a clutch of accolades including UK's Best Cultural Event 2016. And no wonder. Set amidst the stunning autumn woodland of Forestry Commission Scotland's Faskally Wood in Highland Perthshire, The Enchanted Forest is a sound and light extravaganza. Each year has a different theme (last year's was 'Shimmer') where the forest landscape is illuminated accompanied by an original musical score.

Taking place in mid-September each year The Enchanted Forest shows how festivals can extend day into evening as well as extending the season for forest visits. It takes time to build this type of event however; the Enchanted Forest has been going for 15 years before achieving its current status attracting 70,000 visitors over the month-long festival. Ticket prices range from £15 to £20 for adults with children's and family tickets available.

The Enchanted Forest Community Trust was set up 2010 with the sole purpose of running the festival. Operated by a board of trustees, drawn from the local business community, the charity is guided by the objective of bringing benefit to the Highland Perthshire area.



Places to stay

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

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

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

What we are going to do

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





Case Study: Nesting at Robin Hill Country Park, Isle of Wight

Robin Hill offers rides, falconry and adventure play for families set in 88 acres of countryside and woodland gardens. Looking to extend their offer beyond a day visit Robin Hill is developing onsite accommodation - engagingly called 'nesting'. Still at proposal stage and hopefully opening in 2019, the nesting site will include 28 timber framed lodges, 22 treehouse structures in the tree canopies and an area for 40 glamping tents.

The aim is attract visitors to the Island for longer stays and provide accommodation for the numerous festivals and events which now take place at all times of the year.

Blue Forest, regarded as the world's leading treehouse consultants, were commissioned to produce the designs, working closely with international architectural practice Tate Harmer specialists in sustainable, sensitive designs. The accommodation will be distinctive and quirky as well as beautiful. Fit within the landscape is a driving principle of the innovative design. The iconic design for the treehouses was inspired by nature and is based on the curvy and organic form of a Weaver bird's nest, each with an arced glass front and a balcony.

What is especially relevant to the Forest is that this design doesn't need mature trees to construct, yet is very much about trees.

People & places

Our people

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

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

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

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

Creating great places

We need to create high quality environments within our woodlands and in our forest towns. Visitors need to know when they are in The National Forest. Our brand must be evident in the way places are presented and managed. We want our visitors to be able to taste local produce and buy things that have been made from the Forest or inspired by it. We want our towns to be as strongly associated with the Forest as Hay-on-Wye is with books, Ludlow with food, Cheltenham with festivals and Falkirk with using art in the landscape.

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



We want business owners to choose The National Forest because they share its values, see the opportunity tourism offers and want to be part of its success. Visitors create a demand for new Forest products and services and their custom adds value to existing businesses serving local communities.

Signing and interpretation is a particular challenge for The National Forest. We need clear boundary and road signs, and consistent, well-maintained Forest branded signs that instil confidence in visitors to explore, and to reinforce the Forest's distinctive sense of place. The National Forest brand must become a trusted quality marque and we will require businesses using it to meet agreed quality standards.

What we are going to do

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



Marketing & promotion

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

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

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

What we are going to do

We will:

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

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

Domestic Leisure Tourism Trends for the Next Decade, 2013, VisitEngland

² Google, 'The 2013 Traveller'

Research & evidence

Monitoring progress and evaluating success

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

What we are going to do

We will:

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





Collectively we are stronger together and through committed partnership working across the Forest we can deliver this Plan.

Making things happen

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

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

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



Images courtesy of:

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Chris Beech with Burton & South Derbyshire College students

Dave Watson, Woodland Survival Crafts

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