The National Forest - Destination Plan (2015-25)

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The National Forest - Destination Plan (2015-25) Development Gap Analysis

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Preface

The idea for The National Forest began over twenty years ago – a bold and ambitious plan to create a major new forest for the nation right in the heart of England.

This forest would regenerate areas which had suffered from the decline in traditional industries. It would restore landscapes, enhance biodiversity, bring new employment opportunities and provide a place to play for residents and visitors alike. It would be 'the people's Forest'.

Tourism and recreation were central to the concept. The National Forest would create a new outdoor experience, accessible to all, with activities, attractions, places to stay and space to enjoy the outdoors. These activities would create jobs and bring value into the local economy.

To date there are have been two Tourism Plans for The National Forest. During this time, many things have changed. The Forest has matured and has begun to become established as a destination. The funding climate has also changed and this will potentially impact on the role of the National Forest Company and how it could work with its partners. This report therefore considers how The National Forest Company could work with its partners in future to develop the Forest as a place for recreation, enjoyment and play over the next ten years.

It has been produced by AMION Consulting, TEAM Tourism and Hotel Solutions to advise the National Forest Company, as custodians of the Forest, about the potential areas for development. These development opportunities will need to assessed in more detail at the next stage to understand the potential cost, impact and delivery implications.

Behind this report there is a technical document called The Technical Report which provides the detailed information which informed the thinking.

1 The National Forest now

1.1 The Forest as a place to visit and play

Tourism and recreation are a big part of The National Forest's success story.

In 2013, the visitor economy in the Forest was worth £337m and supported around 4,500 full time jobs. Around a third of this spend came from the 720,000 visitors who were staying in the area, whilst the remaining two thirds came from the 6.4m local residents and people who visited the Forest for the day.

Over the last five years, the number of visitors staying in the Forest, and the amount these people spent in the area, has increased by around 30%.

This growth can be attributed, in part, to the many changes and developments which have taken place in the Forest over recent years.

Some recent developments in The National Forest

The Forest's accommodation stock has seen some major new additions with two hotels at The FA centre at St George's Park (with more to follow), two new budget hotels, boutique holiday lodges and a new activity centre for groups. Meanwhile many existing hotel, guesthouse, B&B and holiday park owners have continued to expand and invest in their properties.

The new 75 mile National Forest Way provides a long distance walking trail through the Forest, linking the National Memorial Arboretum in Staffordshire to Beacon Hill Country Park in Leicestershire. Short circular walks off the trail provide more accessible routes for most walkers.

The wooded area also continues to grow, with the notable addition of the flagship Woodland Trust 170ha Queen Elizabeth II Diamond Jubilee Wood. Woodland cover has increased from 6% (1991) to 20% (2015).

Many of the Forest's visitor attractions have also seen ongoing development including Conkers, Rosliston Forestry Centre, Bradgate Park, Catton Hall, the National Brewery Centre and the National Memorial Arboretum. Newer attractions continue to be added including the National Trust's Arts and Craft cottage, Stoneywell.

The majority of these developments were brought forward by organisations which recognised the value of The National Forest brand and which can see the future of their business flourishing as the Forest continues to grow.

1.2 The National Forest's assets

There are many things which contribute to the Forest's success as a place to visit. These are the Forest's assets.

Visitors are offered a choice of 128 different places to stay ranging from hotels and spas to campsites and youth hostels.

There is a mix of attractions which include the nationally recognised National Memorial Arboretum, National Brewery Centre and the National Trust's Calke Abbey, as well as attractions which were created specifically for the Forest such as Conkers and the Rosliston Forestry Centre. Alongside these, there is a plethora of smaller museums, gardens, farms, country parks, reservoirs and two marinas.

The many activities in the Forest include walking, cycling, horse riding, , fishing, skiing and snowboarding.

But beside these very tangible assets, The Forest brings many 'softer' benefits to its visitors.

For many people, the Forest is very close to home – it provides easy access to the outdoors for a large percentage of the country's households.

And the activities and attractions that are on offer can be enjoyed by nearly everyone. Cycling and walking in the Forest does not need great skill, fitness or expensive kit, just a desire to 'get out and about'.

The attractions are perfect places where families and friends can spend time together, enjoying the outdoors – and the indoors – and appreciating time dedicated to relaxation.

Equally importantly, the Forest is a place where new experiences can grow and develop easily. The regenerated land is an ideal environment for new or existing leisure businesses to start up or expand. It provides a positive and supportive climate which encourages new and existing operators to open up and take advantage of the large number of potential visitors on the doorstep. It has the space and the flexibility to continue to change and refresh the offer in a way which many other destinations do not.

Green Credentials

The National Forest is built on green credentials which underpin everything which the National Forest Company does. Whether this is a part of the reason why people visit or not, the National Forest Company will continue to encourage and support sustainable development including sustainable tourism.

These existing assets and opportunities are what makes The National Forest special and what gives it potential for the future.

1.3 The challenges

However, The National Forest also has its challenges……

The Forest is not yet recognised by most visitors as a single, coherent destination. The majority of day visits are made to individual destinations, rather than the Forest as a whole. Staying visitors are also often in the area for purposes other than a leisure trip. This limits the amount of time and spend in the area and limits the value that visitors get from their trip.

Perhaps inevitably, across the 200 square miles of the Forest, the quality of the experience varies. Some things are excellent but others require reinvestment and improvement. In recent years there has been a slight decline in day visits to the area and this is probably due to increased competition from other destinations, the impact of the economic downturn and the difficulty of attracting funds to refresh some of the major attractions.

Ensuring that the Forest continually improve its offer to visitors will remain a lifetime challenge.

Perhaps most importantly of all, much of the landscape has been recreated from former brownfield and mineral worked sites. It will never have the innate beauty of the national parks or some other rural destinations, but this does not detract from the pleasure and the value which the landscape brings.

It just means that the National Forest Company and its partners will work harder to ensure that the experiences provided are the most exciting, the most accessible and the most enjoyable in the country.

1.4 The changing environment

The environment in which The National Forest operates is changing and will continue to change. There is a need to understand the opportunities and challenges that these changes bring and respond accordingly to them.

Key Leisure Trends

- Changes in the way people live and work mean that holiday trips are getting shorter. Many short breaks now last for just one night but many households will take several trips each year, involving both overseas and domestic visits. ***This provides a great opportunity for the Forest as an 'emerging destination'.***

- The way that households make trips, however, varies according to income levels. Whilst the more affluent homes are now enjoying more trips, harder pressed households are taking fewer holidays. ***The Forest needs to remain accessible to everybody, particularly those in the immediate catchment area who have less disposable income***.

- The trend to holiday at home – staycationing – appears to be here to stay. Easier travel, variety and nostalgia are amongst the many reasons why UK households are increasingly chosing to spend some of their holiday time in this country. ***With such a significant market on the doorstep, the Forest needs to take of advantage of the 'holiday near to home' opportunity.***

- Households are changing with more people living alone, more single parent households and more multi-generational families than in previous times. And so holiday behaviours are changing. We are seeing more large groups holidaying together, more multi-age groups seeking accommodation and things to do and more adults travelling without children. Self-catering accommodation is increasingly popular as the most flexible and often cost effective way to stay. ***The Forest needs to develop more things to do and accommodation which meets visitors' (and potential visitors') changing needs***.

- The recession has transformed the way in which we spend our money. Customers are more discerning than ever and are choosing destinations which provide excellent quality and value for money. They are taking time to be well informed, often using the internet to check customer reviews or get the best deal. In fact, customers across the whole social spectrum are now inclined to seek out a discount, deal or special offer. ***The quality of the experience and the value that the Forest offers needs to be communicated to visitors.***

- Holidays and days out are now seen by many as an essential part of modern living. This time away is valued in many different ways: as time for activity; time for relaxation; time to reconnect with nature; time to learn new skills and enjoy new experiences. ***The National Forest can offer all of this. The right experiences need to be communicated to the right people with the right messages.***

2 The Future

2.1 The vision

The National Forest will develop a reputation for offering a stunning range of attractions, activities and places to stay for everybody, in the UK's most accessible woodland setting.

Tourism expenditure will grow by 3% each year to 2020.

2.2 The opportunities

There are four potential important opportunities which could form the four strategic objectives for The National Forest.

Objective1: Focus on genuine strengths.

The National Forest as a destination will never be able to compete with the national parks or traditional heritage destinations in terms of the natural and built environment and nor should it try to. It should focus on the areas of genuine strength:

- The good range of outdoor activities and attractions for families and the accessible outdoor recreation for people of all ages;
- The accessibility to a large percentage of the English population; and
- the opportunities to encourage and facilitate appropriate new tourism and recreation developments.

Objective 2: Focus on core customers

There needs to be clarity about what The National Fortest offers and to whom. This is about selling the collective National Forest – not the individual places and attracions in it. It is about a distinct proposition for the visitor.

The core elements of the proposition are summarised in this diagram. **The essence of the Forest offer is not necessarily about places but about the experiences and feelings of visitors**.

As a destination, The National Forest should target a **mass market - rather than a niche audience**. The scale of the market potential and the way in which the Forest is used already suggests this is where it can add value. Complementing this, it will be the responsibility of individual operators to target specific niche markets.

Currently, The National Forest is best known, and of greatest value, to people living within an hour's travel time. This should be the main target for both day and staying visitors. The Forest should target two key groups of consumers[1] – 'fun families' and 'easy active adults'.

> **Fun Families**
>
> **Who are they?** They are relatively young families. They are made up of parents in their thirties and early forties and children generally under the age of ten. They are middle income groups – not badly off, but price conscious. This is mainly an urban population – the countryside is not their natural environment.
>
> **What are they looking for?** Coming for both day and staying visits (mainly in non-serviced accommodation). They are primarily driven by a fun family experience. Within this, secondary considerations will be health and activity, education and learning. They will look for a combination of indoor and outdoor activities – depending on the weather. Budget will also be a factor. Outdoor activities need to be easy to do and easy to access for this group.
>
> **Easy Active Adults**
>
> **Who are they?** Adults (mainly 50+) often visiting without children. Again, they will be middle income. They will have more disposable income but value for money will still be an important driver.
>
> **What are they looking for?** Their primary focus will be on outdoor activities – walking and recreational cycling. Making it easy is key – this is not a confident segment. Eating and drinking opportunities, heritage attractions, and low key retail opportunities are also important.

Objective 3: Focus on large-scale investment

To move over the next ten years, from a position as 'emerging destination' to achieve the vision as a 'recognised destination', a really proactive approach is needed to attract large scale investment. The National Forest Company should identify ways to target a range of high quality, unusual or special forest or woodland attractions, activities, events and visitor accommodation. These major development schemes will ensure that The National Forest continues to exploit its proximity to such a large potential market. It will also ensure it continues to develop as a genuinely distinctive destination.

In doing this, it will build on what The National Forest has been doing over the first twenty years of its existence.

The Strategy for the next ten years should focus on securing the next generation of major leisure attractions and accommodation.

[1] These segments have been defined specifically for The National Forest based on an analysis of visitors

Objective 4: Exploit the existing assets

In the right markets, The National Forest currently has significant assets and a strong offer. Alongside new developments, it should continue to exploit these to grow the visitor economy.

More can be made of key markets that surround The National Forest. The National Forest Company and its partners should refine and improve the existing offer by refreshing key attractions like Conkers, supporing existing businesses and continuing to develop the environment and trails.

3 The route to get there

This section summarises the things that the National Forest Company and its partners should do, grouped under six different headings.

3.1 Accommodation development

3.1.1 Priorities

Increasing short break and holiday business is a priority. New high quality accommodation, that is relevant to The National Forest and suitable for visitors, is key to achieving this. It will both drive and enable new business.

Stimulating new accommodation will be a priority.

In looking at the market place and the National Forest's needs there is a 'sweet spot' between what is wanted and what can realistically be attracted. This is:

- self catering accommodation such as holiday cottage barn conversions, additional holiday lodges;
- large-scale holiday/eco lodge parks with central leisure, sports and catering facilities;
- caravan and camping – for example, small touring sites, camping pod developments and glamping sites;
- accommodation in woodland or waterside settings;
- accommodation linked to outdoor activities – for example, fishing lodges and treehouses and accommodation linked to the National Forest Way;
- family-orientated accommodation;
- children's activity holiday centres and outdoor education and field study centres;
- accommodation with strong environmental credentials; and
- good quality pub accommodation.

A key opportunity is to **attract a major family activity holiday park**. This will not be a quick win and more work is needed to understand whether and how this could be delivered. Significant commercial investment will need to be secured, probably through a development partner. A major new park like this would attract its own market (rather than relying on existing Forest visitors) and would make a step change in the volume and value of holiday business in The National Forest. Although this is a long term ambition, it should be prioritized because of the value it will bring.

There are also opportunities for smaller developments. Given current demand for the existing, smaller, non-serviced accommodation, the development of additional properties and rooms should be encouraged slowly over time, to avoid displacing existing business. Investment and improvement should be encouraged however in the existing accommodation stock.

Case Study – Activity holiday park

The Watermark Club at the Cotswold Water Park near Cirencester is the UK's largest holiday lodge development. It comprises over 400 privately owned New England style lakeside holiday lodges around 6 lakes that have gradually been developed over the last 20 years. Each lake is unique and the holiday homes are individually designed and furnished. They range from one to four-bedroom holiday homes and lodges in a variety of different styles.

The majority of homes are retained by their owners for their exclusive use. The Club also offers a rental service for owners. Other owners let out their homes themselves or through letting agencies.

The development offers a range of water sports, including cable-tow water skiing, wind surfing, sailing and fishing. Two of the lakes have lakeside brasseries and one has a gym. The club is currently selling the latest phase of 50 holiday homes around the Summer Lake.

3.1.2 What could be done

Key activities that could be undertaken over the next five years:

- target major new accommodation schemes, beginning with market testing and business case development, then through an Investment Marketing Campaign that identifies potential investors, supportive planning policy, available sites, current intelligence; and
- support investment in existing and new smaller scale accommodation developments – through a range of measures including: tailored business support and training; securing small grant schemes for businesses and providing a positive planning framework.

Case Study - Tree camping

Tree camping in tents and structures suspended in trees is an interesting, although very niche, emerging trend.

The Lost Meadow Tree Tent in Bodmin, Cornwall, is one small scale example of how woodlands can provide an exciting environment for original and low impact accommodation.

Suspended from strong cables 3m above the ground, each treepod offers two single beds, double doors to let in the sun and a ceiling window from which to look at the night's sky. Below each tent is a kitchen hut and fire circle. Campers are free to explore and roam in the woodlands around.

Prices for two people are from £95 per night.

(www.canopyandstars.co.uk/britain/england/cornwall/broom-park-farm/lost-meadow-tree-tent).

3.2 Visitor attraction and activity development

3.2.1 Priorities

Providing exciting, high quality activities and things to do will be a key driver of all visits, whether from local people or those coming from out of the area. These need to be reinvented and refreshed as part of the Forest experience.

The priorities should be:

- to support the redevelopment and refreshment of the existing attractions in the Forest, particularly those like Conkers and Rosliston Forestry Centre which, for many people, are synonymous with the Forest; and

- identify and attract potential major commercial leisure partners which are in keeping with The National Forest brand. The National Forest Company and its partners should look in particular at the leisure developments which continue to grow in popularity and which would appeal to visitors. This will also be a long term ambition, and one which will be an important priority because of the significant impact it would have on the destination. The types of experiences to look for include:
  - high ropes courses which do not require mature trees;
  - freestyle trampolining experiences;
  - big scale zip wires (static or touring);
  - adventure play.
- The National Fortest Company and its partners should also keep a watchful eye out for any major visitor attraction development opportunities and go after any that could have a good fit and realistic potential for The National Forest.
- Encourage the ongoing development of activities and attractions which are not attractors in themselves but could add to the existing offer. The type of development which would be appropriate includes:
  - indoor caving;
  - climbing walls;
  - segway trails;
  - zorbing; and
  - treetop walks.
- Continue to improve 'bread and butter' activities: cycling trails, walks and horse riding routes. Ensure that these activities remain accessible to everyone.

3.2.2 What could be done

Key activities that could be undertaken over the next five years:

- undertake market testing then proactively market the opportunity to suitable developers. In order to do this it will be necessary to identify suitable sites, develop a prospectus, identify a list of target prospects and ensure that all partners understand and assist in promoting the opportunity;
- identify suitable funding sources including development partners who can assist in bringing these attractions to the Forest;
- encourage the redevelopment and refreshment of the Forest's existing major attractions and help to secure grant or loan funding for reinvestment;
- create the right climate within which smaller attraction and activity owners and operators can expand and develop their offer. Champion and identify business support schemes and grants;

ensure that there is a favourable planning policy which supports growth; and continue to drive footfall through marketing; and

- continue to improve cycling trails, walking routes and bridleways. Improve access to and from the trails to ensure that they are easy to get to; explore options to create new loops off The National Forest Way; increase the range of accessible trails; improve signage and way finding and increase the use of digital communication.

Case study – Big Zip Wires

Over the last two years, a small number of very high and very fast zip wires have been developed in the UK. **Zip World** is located in Snowdonia and features a pair of one-mile long zip lines which begin 500 feet in the air and reach speeds of up to 100 miles per hour. The Eden Project in Cornwall also features a zip wire attraction. It is operated by **Hangloose Adventures**. The zip wire reaches speeds of 60 miles per hour from a starting height of 300 feet travelling over half a mile. The **Mellors Group** of Nottingham have a touring zip wire that has just spent the summer in Liverpool city centre where participants were charged around £15 to experience the half mile long zip wire which started from over 115 feet high.

3.3 Event development

3.3.1 Priorities

Major events are important to the future of the Forest in many ways. They bring footfall and spend to the area. They build profile and generate media coverage. They change and refresh the experience. They attract new and different audiences.

The priorities should be:

- attract one major new family festival which will be bespoke to The National Forest and which will attract new, as well as current, or local audiences;
- look at ways in which The National Forest can support the growth of at least one of the current big Forest events e.g. The National Forest Woodfair and the Walking Festival; and

- encourage appropriate 'footloose' events to the Forest, particularly cycling and running events.

3.3.2 *What could be done*

Key activities that could be undertaken over the next five years:

- make contact with 'on brand' festival operators and developers and discuss the opportunity in the Forest. Identify suitable sites; look into potential 'pump priming' funding sources; draw up a target list of potential operators or event developers and work with partners in the Forest to ensure any existing contacts or opportunities are exploied;
- discuss with opportunities with partners for expanding existing major events to create events with a genuinely national profile. Explore: where there is evidence of capacity for expansion; ambition and any barriers to growth; possible sources of 'pump prime' funding; potential to support growth through marketing or business support;
- research and draw up a list of footloose events which match The National Forest Brand values and which could be hosted in the Forest. Identify what is needed to attract them and work with venues and local authority partners to create a positive environment for event organisers; and
- identify suitable touring attractions and events which would add new experiences to the Forest. Research new and exciting attractions and activities in the UK and internationally, find suitable sites and develop a 'prospectus'.

Case Study – Latitude

Festivals have fared well during the recession with many continuing to sell out. Festivals which cater for the family market are a relatively new, but seemingly successful, sub set of the festival market.

Latitude is one of the best known family festivals which attracts around 35,000 visitors to Suffolk over four days each year. The festival began in 2006 and was quickly dubbed 'the thinking person's festival'.

Entertainment includes music, poetry, theatre, comedy, arts activities and play. There is a strong emphasis on families enjoying activity together and accommodation is provided in family friendly camp sites.

3.4 Marketing and information

3.4.1 Priorities

The National Forest is still young and awareness in general, and as a visitor destination, remains relatively low. It is important to increase awareness and the desire to visit. Potential visitors need to be provided with the right tools to make a decision and plan their trip. Funding is always going to be limited for marketing The National Forest (as it is for most destinations). The National Forest Company needs to be smart and focused with its resources – but also realistic.

Historically the National Forest Company has marketed under the banner of '*The National Forest and Beyond*' and used a combination of print and online media. This has largely worked but changes are needed for the future. Print is less cost effective with less support from, in particular, the accommodation sector - as booking is increasingly online. Online content, partnerships, use of social media and presence in guidebooks can all be strengthened.

In future, the emphasis should be on:

- developing clear brand messages and propositions and ensuring these are communicated consistently by all those with an interest in promoting The National Forest. Find more effective ways of working between the National Forest Company, Destination Marketing Organisations (DMOs) and Local Authority partners, to allow businesses to contribute to marketing campaigns;

- refocusing marketing campaigns away from print to online media and developing stronger online content. This should not just rely on a website but will need to embrace effective forms of proactive online advertising and social media;
- creating a series of changing propositions through the website. These will be tactical and targeted at the key markets: fun families and easy active adults; and
- building awareness through media work, social media and work with national guidebooks.

While the central thrust of the wider National Forest marketing and information will be online, traditional media should still be used where there is still a strong rationale to do so – for example: attractions guides, walks and cycle route leaflets and leaflet racks.

3.4.2 What could be done

Key activities that could be undertaken over the next five years:

- develop and refine The National Forest tourism brand and ensure its adoption by partners;
- strengthen The National Forest's online presence and develop the content;
- develop annual campaigns that use a range of different media and seek to increase awareness and sell specific propositions; and
- maintain and develop a portfolio of 'in destination' information print such as the attractions guide.

3.5 Place development

3.5.1 Priorities

A key idea in previous National Forest Strategies has been the development of 'visitor hubs'. These are essentially distinct areas with a range of facilities in places which have the potential to appeal to visitors.

The National Forest lacks a strong 'tourism town' (like Bakewell, or Keswick). These are important – they provide a focus for visitors but also create opportunities for inceasing visitor spend. Encouraging the towns and villages which have some natural appeal to visitors to improve their tourism offer should continue to form an important part of the long term strategy.

It is important, however, to be realistic about places which have something which can be built on and those which do not. This will be a long term process – there are no quick fixes and developing places involves many different organisations coming together.

Within The National Forest, the places which offer some potential as visitor hubs or 'honeypots' are:

- Ashby de la Zouch;
- Melbourne and surrounding villages;

- the villages around Charnwood; and
- Burton upon Trent.

The National Forest Company should work with partners to develop Destination Development Plans for these places. These will focus on improving the core elements of the experience for visitors such as: public realm; independent retail; food and drink; pubs; local visitor information (Tourist information points etc); visitor accommodation; signage and interpretation; toilets and parking.

3.5.2 What could be done

The National Forest Company should encourage Local Authority partners to develop and implement Destination Development Plans for the four potential hub areas and work with them to identify funding to support this.

3.6 Underpinning activities

3.6.1 Priorities

Underpining the priorities outlined above are a number of supporting activities. By themselves, these will not necessarily bring new visitors to The National Forest but they are essential in improving the experience for the visitor – making them happy and encouraging repeat visits.

There are a number of gaps and weaknesses in the current visitor experience and, in the future, the National Forest Company and its partners will need to work to address these. In many cases, the National Forest Company will need to work with organisations that sit on the periphery or outside the tourism sector.

There are a number of priorities.

Business support schemes are important. There are a number of good examples such as the scheme run by the Staffordshire DMO with European Regional Development Funding (ERDF) funding. These work best when they are addressing a particular subject or 'issue of the moment' (for example, social media, or funding opportunities) or addressing a particular geographic cluster (for example, businesses in Charnwood Forest) or both. The priority is to develop a tactical programme of business support that is fresh and relevant. This will need to be taken forward with a range of partners including the Local Economic Partnerships (LEPs).

Public transport to and within The National Forest is a weakness. Public transport is generally not shaped by tourism considerations and will be hard to influence. However, there are a number of measures that could be introduced relatively easily and the National Forest Company should seek to influence these. Examples include specific services and timetables which meet visitor's needs, such as bike racks on buses and joined up multi-transport timetable information and, in the longer term, improved public transport links both to and within the Forest.

Distinctive local **food and drink** is becoming increasingly important in a destination's offer and many areas are proactively developing their food offer. The National Forest area does not have a distinctive food heritage but does have a rich brewing history. The priority should be to develop a stronger local food and drink supplier network and promotion and ensure local food is championed by the tourism sector.

Finally the **intelligence and research** base is adequate, but not exceptional. Data is available on the impact of tourism but less on visitor behaviour and characteristics and business performance. Quality research can be expensive but the National Forest Company should look to improve the information to help guide marketing and investment activity.

3.6.2 What could be done

Key activities that could be undertaken over the next five years:

- develop business support schemes;
- encourage improvements in public transport;
- develop food and drink suppliers' networks; and
- improve research and intelligence gathering.

4 How this could be delivered

This report has identified:

- the genuine strengths and points of differentiation for The National Forest;
- the gaps in the current offer; and
- the potential development opportunities which would strengthen the destination offer and could potentially be realised.

At the next stage, the National Forest Company should carry out a more detailed assessment of these development opportunities, considering:

- the cost of development and the likely return on investment;
- the likelihood of secruring a development partner or development funding;
- the likely impact of the developments in terms of net additional impact on the visitor economy (over and above what is happening already);
- any issues or barriers to development;
- timescales.