The National Forest Company

The National Forest - Situation Report and Taking Shape

A Report

January 2015

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1 Introduction

In October 2014, The National Forest Company commissioned AMION Consulting, working with TEAM Tourism and Hotel Solutions, to produce a Destination Development and Management Plan. The work will sit alongside the wider strategy for The National Forest (2014 to 2024) focusing specifically on the development of the visitor economy.

It will update the Vision and Action Plan for Sustainable Tourism in The National Forest, produced in 2009 by the Tourism Company.

The work involves three core stages. The first stage provides a baseline of evidence about the current performance and offer. It also involves detailed consultation with key stakeholders and a business survey to understand the key development opportunities and any constraints to development.

The second stage identifies potential development opportunities. Soft market testing will be conducted, where relevant, with potential developers to provide an assessment of the key opportunities.

The findings are summarised in this Situation Report which sets out the current position and potential areas of opportunity.

Key stakeholders will be invited to discuss and comment on this interim report at a workshop in February 2015.

Following the workshop, the third stage of the work will provide a Destination Development and Implementation Plan which will summarise the findings from the first two stages, set out a vision for the 'future Forest' and identify the growth priorities and targets. A supporting Implementation Plan will translate the priorities for action into a series of discrete and deliverable projects, divided into short term and longer term actions. The process is summarised in Appendix A.

2 Current situation

2.1 National context and current tourism trends

There are a number of factors and trends which are currently impacting on The National Forest and will influence visitor expectations in the future.

UK domestic tourism (UK residents taking holidays in the UK) has thrived over the last five or six years giving rise to the term 'staycation'. The number of holiday trips taken by UK residents grew by 15% between 2008 and 2013. Over the same period, the number of holiday trips taken abroad has fallen by 20%. It is, however, urban and city destinations which are thriving rather than seaside or rural destinations. London, Manchester, Liverpool and Birmingham have performed exceptionally well. Oxford, Leeds and Milton Keynes have also seen strong growth.

On the back of a growth in urban, city breaks it appears that **short breaks are getting shorter** - many city breaks are only for one night. Manchester, for example, has a very short average length of stay with visitors motivated by shopping, football and nightlife. **The car remains the preferred form of transport, however,** when taking a short break in the UK with 80% of tourists using their car to access destinations.

Aside from short breaks there is a particular **trend towards large groups holidaying together** in the UK, such as extended families, groups of families or large groups of friends without children. There is **also a very significant trend towards self-catering** - lodges, cottages and luxury camping (yurts and glamping) have all proved to be popular in recent years. The four Center Parcs resorts in the UK (as an example) have traded at around 95% occupancy throughout the last few years with the company opening a fifth site in 2014.

A number of key consumer trends relating to tourism and leisure have emerged following the recession and economic downturn of the last few years:

- much **more *discerning* customers** as expenditure has been squeezed and visitors only visiting those destinations which represent excellent quality and value for money;
- much **more *informed* customers** as a result of much greater internet usage and the dramatic growth of review sites such as Tripadvisor; and
- much **more *savvy* customers** as people (across all socio economic groups) seek out a discount, a deal or a special offer.

Meanwhile, **the number of tourists coming to the UK from overseas has continued to grow,** albeit with some decline between 2007 and 2010. The number of people coming to the UK for a holiday (as opposed to business purposes or visiting friends and relatives) continued to increase all throughout the recession and economic downturn. **The number of people coming to the UK for a holiday has increased by 65% over the last ten years**. **London, however, is the destination of choice** for most overseas tourists and the number of people staying in London far outweighs any other UK destination. Edinburgh, Manchester, Birmingham and Liverpool are next with 3.5m visits collectively which has grown by 1m over ten years. Traditional destinations like York, Bath and Stratford have seen some long term decline. The four and five star branded accommodation offer in major cities is the major contributory factor in this.

International tourists give the following motivations for visiting the UK: heritage, culture, sport and shopping. Whilst overseas tourists are keen to 'see the sights' they also come to the UK to indulge themselves and seek luxury, authenticity, health and wellbeing. Further information is provided in Appendix B.

2.2 Progress since 2009

The previous National Forest Vision and Action Plan for Sustainable Tourism covered the period 2009 to 2014. This set a growth target of 3% per annum in expenditure terms.

The five strategic objectives were to:

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

These translated into 27 action areas, a summary of which is provided in Appendix C.

There is clear evidence that significant progress has been made since 2009.

Overall, the most significant indicator is that the 3% growth target has been met. This is explored in Section 2.3 below.

Some of the most significant specific developments and interventions include:

- major accommodation developments at: St George's Park; Whitemoor Lakes Centre; new Premier Inn and Travelodge budget hotels in Burton-upon-Trent and Ashby Woulds boutique holiday lodge park at Overseal;
- a range of smaller scale accommodation developments across The National Forest;
- creation of the 75 mile National Forest Way long distance walking trail from the National Memorial Arboretum in Staffordshire to Beacon Hill Country Park in Leicestershire;
- Creation of new woodlands, including the flagship Woodland Trust 170ha Queen Elizabeth II Diamond Jubilee Wood;
- ongoing development and investment at the area's attractions including: Conkers; Rosliston; Hicks Lodge: The National Forest Cycle Centre ; Bradgate Park; Catton Hall; the National Memorial Arboretum; and
- The National Forest and Beyond partnership and campaign which provides an opportunity for partners to work together under The National Forest brand.

These developments were brought forward by a variety of organisations, most of which recognised the importance of The National Forest Strategy as providing a valuable enabling framework for development. In particular, The National Forest brand was seen as playing an important role in creating strategic profile for the area and the planning policies were seen as supportive of suitable development[1].

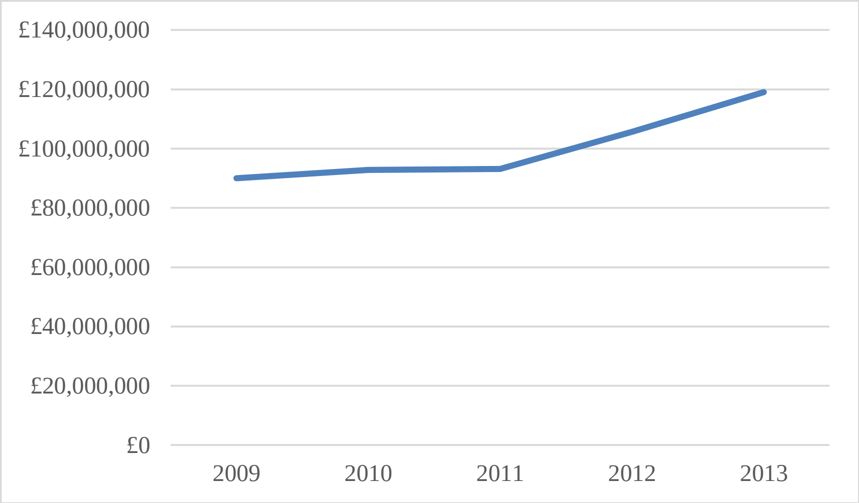
2.3 Economic impact

Tourism is clearly a very important part of the economy within The National Forest. STEAM data[2] commissioned on behalf of the National Forest Company indicates that the visitor economy was worth around £337m in 2013. This expenditure by visitors is estimated to support around 4,500 full time equivalent jobs.

Around £119m of this visitor expenditure is attributable to staying visitors which equates to around 35% of all visitor expenditure. The remaining £218m (65%) is attributable to day visitors.

Over the last five years, the number of **staying visitors** has increased by 30% from 550,000 in 2009 to 720,000 in 2013. Most of this growth can be attributed to the development of the new hotels at (and in close proximity to) St George's Park. This increase in the ***volume*** of people staying in The National Forest has led to a corresponding increase of 30% in the ***value*** of tourists staying in The National Forest. In 2009, staying visitors generated expenditure of around £90m in the economy. In 2013, this figure had increased to £120m (even after allowing for the effects of inflation) supporting an additional 360 full time equivalent jobs.

Figure 2.1: Expenditure of staying visitors (including inflation)



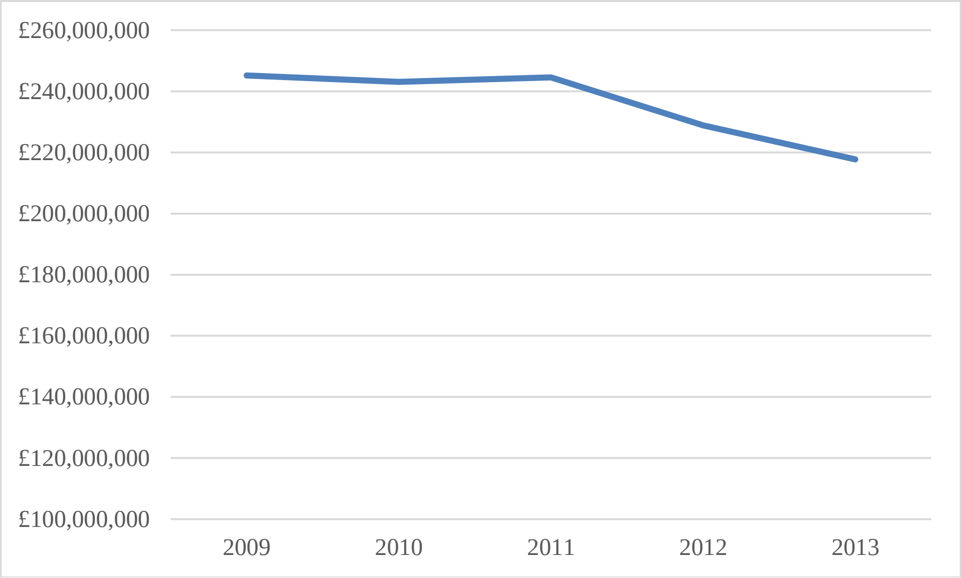
[1] Feedback from consultations as part of this process.

[2] STEAM is a method for measuring the economic impact of tourism developed by Global Tourism Solutions and used widely by local authorities. It provides an indication of the number of staying visitors and day visitors in a given area based on known supply of accommodation and visitor attractions. Estimates of visitor expenditure are made which are used to estimate the number of jobs supported by tourists and visitors. The STEAM model has its limitations and flaws and is more useful as a tool to monitor trends over time than a precise indicator of visitor numbers.

Source: STEAM 2013, Global Tourism Solutions for The National Forest Company

Whilst the volume and value of ***staying visitors*** has increased over the last five years (by 30%), the volume and value of ***day visitors*** has, in fact, declined by 11%. In 2009, there were 7.26m day visits to The National Forest which generated £245m of visitor expenditure. By 2013, the number of day visitors had declined to 6.44m (over 800,000 fewer people visiting for the day) and visitor expenditure declined by £27m to £218m (equivalent to 164 jobs).

Figure 2.2: Expenditure of day visitors (including inflation)



Source: STEAM 2013, Global Tourism Solutions for The National Forest Company

It appears that the growth in the volume and value of *staying* visitors has compensated for the decline in *day* visitors. In summary:

- in 2013, 720,000 people stayed in The National Forest for at least one night which is an increase of 30% since 2009. The 720,000 staying tourists generated £120m of expenditure which is an increase of 30% since 2009 (even after allowing for inflation);
- 355,000 of the 720,000 staying tourists stayed in hotels or guest houses (49%) staying for an average of 1.8 days and spending £110 per day on average;
- 325,000 stayed with friends and relatives for an average of 2.4 days spending £44 per day on average;
- 40,000 stayed in self-catering accommodation (including caravans and campsites) for an average of 6.7 days and spending £51 per day on average;
- in 2013, 6.44m people visited The National Forest for the day which is a decrease of 11% since 2009. The 6.44m day visitors generated £218m of expenditure which equates to an average spend per day of £34.

Drawing comparisons with other destinations is difficult because there are always a range of different factors influencing different destinations. Some rural and forest destinations have seen growth and some have seen decline. Those destinations which are able to 'behave' more like urban destinations i.e. they have been able to foster the development of new hotels, holiday parks and attractions have seen growth whilst those that are more constrained have seen decline:

- Brecon Beacons – the number of staying visitors has declined by about 18% over 5 years.
- New Forest – the number of staying visitors has declined by about 5% over 5 years.
- Newark and Sherwood Forest – the number of staying visitors has increased by about 40% over 5 years.
- Forest of Dean – the number of staying visitors has increased by about 15% over 5 years.

Unfortunately, comparable data is not available for day visits for all of these destinations although figures for Brecon Beacons suggest that the number of day visits to this area have remained static over the period.

2.4 Market segments

Table 2.1 summarises market segments for The National Forest and their potential size (in terms of relative value). Segments are divided into day and staying visits in the first instance and then segmented on the basis of primary motivation to visit/activity.

While some work has previously been undertaken on market characteristics, there is no current comprehensive research on segments for The National Forest so this assessment is based on STEAM data and key activities (derived from national surveys – GBTS and GBDVS – but weighted by data from the survey of businesses in The National Forest and our knowledge of its offer).

In terms of value the key segments are probably:

- visiting friends and relatives (either day or staying) – about a fifth of the market (22%);
- day visitors using The National Forest area (and its settlements) for entertainment, eating out and/or visiting a pub/bar (an estimated 17% of the market);
- staying business visitors including a small number in the area for conferences and large meetings (about 12% of the market); and
- day visitors taking part in outdoor activities, and 'general' short breaks (i.e. leisure staying trips not motivated by specific activities such as special interests or family events, etc.) which accounted for about 7% of the market.

Table 2.1: Market segments for the National Forest and their potential size

Segment		Market size (approximately % spend)	Growth potential (1-5)	Destination Influence (1-5)
Day visitors	VFR	12%	2	2
	Special shopping	5%	1	2
	Meal/bar/entertainment	17%	2	2

	Sports - watching/participating	3%	3	4
	Outdoor leisure activities	7%	4	5
	Visiting attraction	5%	2	3
	Event	2%	3	4
	Personal event	2%	2	1
	Beauty / health	2%	4	2
	General day out / explore	5%	2	3
	Other	4%	3	1
Leisure staying	General short break	5%	3	3
	Personal event	4%	2	1
	Spa / health treatment	1%	4	2
	Events	1%	3	2
	Activities (special interest)	2%	3	4
VFR staying		10%	2	2
Business staying	General business	11%	2	1
	Conference/large meeting	1%	3	2
Other staying		1%	2	1

Table 2.1 also provides a qualitative rating of the growth potential of each segment and the potential of the destination (as opposed to an individual business) to influence their growth. These are rated on a score of 1 to 5 – 1 is low potential / influenceability, 5 is good potential / influenceability.

Five segments are rated as having good growth potential and as relatively influenceable (highlighted in blue above) and these are three day visitors' segments:

- outdoor leisure activities – including walking, cycling, etc.;
- sports – watching / participating; and
- events.

And two staying markets:

- 'general' short breaks; and
- special interest activities.

Data on lifestage (and other) characteristics of The National Forest segments is relatively limited. The profile of visitors will vary from activity to activity to some extent. Available research suggests that 'typical' National Forest visitors are from middling socio-economic groups (typically C1s), from a regional catchment and comprise two primary lifestage segments – younger families (the largest group) and older people/empty nesters (55+ couples). Older families and young singles are probably less significant lifestage groups.

Data on value based segmentation (like Arkenford) is not available but we would hypothesise that the dominant group would be 'High Streets'.

3 Policy context

The policy framework in which The National Forest sits is complex. The England Tourism Strategy aims for 5% growth per annum to 2020 through four objectives: collaborative marketing, offering compelling destinations, championing a thriving industry and facilitating greater engagement between the visitor and experience.

At a regional and local level, The National Forest sits in the context of LEP and Local Authority economic development strategies. **LEP** strategic themes and interventions tend to be crosscutting (for example, Business Growth Fund, sector skills development, innovation, etc.), with some emphasis on place development and key economic sectors. Tourism is generally recognised as a key economic sector and The National Forest is also generally identified by the LEPs as a potential asset in terms of culture and visitor economy but not necessarily as a core one or as an area for place based economic development. At a **LEP and Local Authority** level, there are few specific visitor economy policies – although specific examples include the D2N2 LEP, and Staffordshire. South Derbyshire, within their economic development strategy, highlight the potential of The National Forest to maximise tourism and the woodland economy to address rural related issues. The **planning framework** across The National Forest is generally supportive of tourism development.

The **National Forest Strategy (2014-24**) identifies the progress since 1991 – the visitor economy has grown, woodland coverage has increased from 6% to nearly 20%. The priorities for The National Forest to 2024 include:

- being a national exemplar, centre of excellence and research partner;
- continued creation of the Forest but with an emphasis on how and why (rather than how much – i.e. quality over quantity);
- a systematic approach to all aspects of forest management (including non-woodland habitats and visitor attractions) to ensure value (of all kind) is maximised;
- a great experience on the ground – including improving the customer journey through effective marketing and information, maintaining the quality of existing infrastructure, new investment and connecting up facilities, experiences and information;
- building the brand and making it more entrepreneurial; and
- 'The Forest for everyone' – an inclusive, accessible and welcoming place for everyone.

A full summary of policies is provided in Appendix D.

4 Consultation overview

As part of this process, a wide range of organisations from the public, private and not-for-profit sectors have been invited to share their opinions about the future of the visitor economy in The National Forest. A list of those who have taken part to date is included in Appendix E.

Two consultation workshops took place in the National Forest Company's offices and a number of individual telephone interviews were arranged.

As well as being asked about their own organisation's plans, consultees were invited to comment on the current strengths and weaknesses of the visitor economy in The National Forest and to consider how these may be built on or overcome in the future. Consultees were also asked about the relevance of the vision for tourism and what could be updated.

The following sub-sections summarise the key findings.

4.1.1 Strengths

For most people, the strength which was mentioned first and with greatest passion was the fact that the Forest exists at all. As a relatively recent and manmade concept, there is a commitment to, and an appetite for, its success which is thought to be lacking in most mature destinations. This hunger amongst all of its stakeholders is both a strength and an opportunity.

Easy access to a large percentage of the English population was also generally perceived as the area's greatest natural asset[3]. For many people living locally, The National Forest is already well established as an important place for recreation, relaxation and leisure.

Two main themes emerged as existing strengths: a place for family activity and an accessible area for healthy outdoor activity for people of all ages. The green foundations of the Forest and the area's reputation for beer were also mentioned by some people.

A number of specific venues and places were frequently quoted as being major visitor 'hubs' or focal points within the Forest. These included: St George's Park (although used only by specific markets); Conkers; Calke Abbey; and some of the towns and villages such as Ashby de la Zouch, Staunton Harold, the area around Charnwood, Tutbury; (which is outside of The National Forest area) and Burton (but with need for improvement).

Several people commented on the supportive planning policy and the range of activity-based things to do.

4.1.2 Weaknesses

Almost all consultees highlighted the lack of major attractions or hooks as one of two biggest weaknesses in The National Forest visitor offer. Many commented on the lack of an accommodation based attraction (like Center Parcs) whilst most talked about the existing attractions being relatively low key and requiring investment. Some people summed this up as 'a lack of anything really special' or a lack of things which would draw people far from home.

[3] C19% of the population of England lives within a 90 minute drive time of The Forest.

The second greatest weakness was the natural environment although most stakeholders were fairly sanguine about the importance of this. Stakeholders generally see the physical landscape as flat and unremarkable and, although the amount of tree cover is growing, it is recognised that it will never feel like the New Forest or the Forest of Dean. Comments along these lines were usually followed by statements which suggested that the area should not attempt to mimic or compete with areas of greater natural beauty but should instead find its own position in people's minds.

Opinion was somewhat divided about The National Forest brand. Most consultees felt that like The Forest itself, the brand is still work in progress. At present, it is not used consistently by all potential partners and is often just added as a logo amongst many on websites and literature. There was greater disagreement, however, about the extent to which The National Forest could ever realistically become a true destination brand for the whole of the designated area. Some people felt it was a matter of time (and money) but that eventually the brand should be the overarching destination brand for the whole area. More people, however, discussed the challenges around the fundamental lack of coherence of the area (often summarised as a middle and two ends) and the fact that the most appealing parts of The Forest will always have stronger individual identities than the whole. Nearly everyone felt that, at present, the brand is probably thought to relate to the heart of the Forest area only.

Specific weaknesses raised included: public transport links; poor leisure retail; confusing signage featuring too many different brands; general lack of appealing towns and villages; and a general lack of breadth of things to do other than specific activities.

4.1.3 Opportunities

There is still a lot of excitement about the opportunity which The National Forest offers as one of the country's only new and developing destinations. Many consultees reflected on the relatively static nature of many competitor destinations which are often far more constrained in terms of fixed consumer perceptions and difficulties in attracting new development. This ability and desire for development presents a raft of future opportunities.

Specific opportunities suggested by consultees generally related to perceived existing strengths, namely the family activity market and the healthy outdoor activity market. People felt that the destination (whatever area this covers within the designated footprint) was likely to achieve a step change through: development of major family-based resort type destination; new big scale activities (not just more cycling, walking, etc.) and more high profile marketing.

Alongside these major new interventions, however, opportunities were felt to exist by building on the existing offer. Particular areas mentioned included: further development and exploitation of the National Forest Way; ongoing improvements to link up cycling and walking trails; more leisure based accommodation; refreshment of the existing attractions; and better partnership working.

4.1.4 The vision for the visitor economy

Consultees were asked to comment on the relevance of the current vision for tourism (provided in Appendix F).

Although most people felt that the majority of the aims remained relevant, the elements which really matter are swamped by the range of things which is covered. Some consultees summed this up as ‘wasted words’.

Generally, there was a feeling that whilst much remains valid, the vision statement needs to be a sharper and more memorable call to action and reminder for all stakeholders. This vision statement should convey very simply the core purpose and the key future opportunities: importance to LOCAL people; ease of access to the outdoors and the intention to develop some genuine ‘crown jewels’.

5 Product offer and performance assessment

5.1 Visitor accommodation supply, development and performance

Our visitor accommodation audit (Appendix G) has identified 128 visitor accommodation businesses that are currently operating in The National Forest area, with a total of 5,542 letting bedspaces. The greatest bedspace capacity is in hotel accommodation and caravanning and camping provision. Self-catering accommodation accounts for just under 13% of the total stock, while group and youth accommodation, health spas and other types of serviced accommodation (inns, restaurants with rooms, guest houses and bed and breakfast establishments) each account for around 7% of supply (see Table 5.1).

Table 5.1: National Forest Visitor accommodation supply – January 2015

Type of Accommodation	Total Establishments	%	Total Bedspaces	%
Hotels	23	18.0	2058	37.1
Inns	11	8.6	114	2.0
Restaurants with Rooms	1	0.8	9	0.2
Guest Houses/ B&Bs	32	25.0	254	4.6
Self-Catering	38	29.6	713	12.9
Caravan & Camping Sites	19	14.8	1658	29.9
Glamping Sites	0	0	0	0
Group & Youth Accommodation	2	1.6	370	6.7
Health Spas	2	1.6	366	6.6
Total	**128**	**100**	**5542**	**100**

From our assessment of this visitor accommodation supply, how it has been changing and how it is currently performing, we highlight the following points:

- serviced accommodation across The National Forest area is generally fit-for-purpose but largely functional. The quality of independent hotels, guest houses and pub accommodation is variable. There is little high quality, distinctive serviced accommodation with strong appeal for leisure break stays;
- hotels and guest houses are primarily located in relatively unattractive town, business park and roadside locations and cater mainly for non-discretionary markets - business visitors, contractors working in the area, wedding parties and people visiting friends and relatives. Leisure breaks are a minor market. Serviced accommodation that is attracting leisure break business is primarily being used as a base for visiting attractions, towns and cities in the surrounding area. The National Forest does not appear to be a key driver of the leisure break business that most serviced accommodation businesses are attracting;
- the area's hotel supply increased significantly in 2011 and 2012 with the opening of the Hilton and Hampton by Hilton hotels at St George's Park and the Premier Inn and Travelodge budget hotels in Burton-upon-Trent. The development of these hotels was not, however, driven by The National Forest;
- bed and breakfast accommodation supply has reduced;

- serviced accommodation performance is generally good but not exceptional, other than for the St George's Park hotels (which attract strong demand from the National Football Centre), the two health spas (which are very much destinations in their own right) and the area's budget hotels (which benefit from their strong branding and national marketing). Few other serviced accommodation establishments achieve an annual room occupancy of over 70% (a key indicator of potential for additional supply) and there is little evidence of their consistently denying business (a key indicator of the need for new supply). Room rates charged by independent hotels are generally low;
- The National Forest has played a key role in terms of encouraging the development of non-serviced accommodation, the supply of which has gradually increased. It was the key driver for the establishment of the YHA National Forest hostel and the Conkers Camping and Caravanning Club site and has been a factor behind many of the log cabin/holiday lodge, self-catering barn conversion and touring caravan and camping site developments that have come forward over the last 20 years. It is these types of accommodation that are primarily attracting short break and holiday business to The National Forest;
- demand for self-catering, caravanning and camping breaks and holidays is largely seasonal. The current performance of these types of business is good but not particularly strong. There is little evidence of consistent shortfalls in supply to meet demand other than at weekends in July and August. Occupancies have plateaued or fallen for some self-catering businesses as the supply of holiday lodges has increased. Some have switched more to catering for long stay business demand or people that require temporary housing between house moves or while work is being undertaken on their home, as short break and holiday demand has become more competitive;
- two touring caravan and camping sites in The National Forest area now offer a few camping pods;
- glamping has not so far developed in The National Forest;
- there is a gradually increasing market for holiday lodge ownership and rental in The National Forest area, with two established holiday lodge parks and the new Ashby Woulds boutique holiday lodge park now open for business;
- The National Forest area has a small number of large self-catering properties and holiday cottage and lodge complexes that attract family and friend ‘get togethers’ and celebrations; and
- group and youth accommodation has slowly developed, with the opening of the YHA National Forest hostel in 2008 and the Whitemoor Lakes Centre in 2011.

5.2 Overview of attractions and activities

Appendix H provides an audit of the existing attractions, activities and events in The National Forest, as well as an overview of market developments in these sectors.

The National Forest offers a wide range of visitor attractions and activities although many are fairly small scale.

There are, however, a small number of regionally (and in some cases nationally) significant **visitor attractions.** The National Memorial Arboretum attracts 280,000 visits and' although military personnel and families make up a significant percentage, the site is also increasingly popular with groups. The National Trust's Calke Abbey House and Estate attracts similar numbers, many of whom are National Trust Members. Conkers is a family attraction which is averaging around 200,000 visits annually, mostly from the local or 'day visit' area. Catton Hall is used as a venue for a wide range events some of which, such as country fairs, attract public visits. Many events, however, are open only to invited guests.

Of the 16 visitor attractions within The National Forest boundary, only four or five (if the National Brewery Centre is included) attract over 100,000 public visits[4].

Table 5.2: Visitor attractions within The National Forest boundary

Attraction	Visitor Numbers
National Memorial Arboretum	280,000
Calke Abbey House & Estate	270,000
Conkers	200,000
Catton Hall (some private events)	200,000
Ashby de la Zouch Castle	160,000
National Brewery Centre	*Not known*
Snibston Discovery Museum	90,000
Sharpe's Pottery Museum	72,000
National Forest Adventure Centre	60,000
Melbourne Hall & Gardens	6,000
Ashby de la Zouch Museum	5,000
Marston's Brewery Tours	3,000
Measham Museum	1,500
Tropical Birdland	*Not known*
Battlefield Line Railway	*Not known*
Moira Furnace Museum	*Not known*
Beehive Woodland Lakes Farm	*Not known*

[4] Although the National Brewery Centre does not publish its visitor numbers it is likely that these are around 100,000 annually. We have excluded the number of visits to country parks from this table since these types of facilities are used in a different way, for example by dog walkers, which generate a significant number of repeat visits, but of a different type. Including them in this list would not therefore present a like for like comparison. Similarly, it would not be comparable to add visitor numbers for Barton Marina.

The area's country parks and reservoirs, which include Bradgate Park, Beacon Hill Country Park, Elvaston Castle Country Park, Sence Valley Forest Park, Staunton Harold Reservoir and Thornton Reservoir also attract large numbers of visits, the majority from local people. Barton Marina with its waterfront shops and pub is similarly one of The National Forest's attractions.

Amongst the **activities** on offer, there are a number of dedicated places for off road cycling, all aimed at novices, families or people looking for sedate riding conditions. Ashby Woulds, Conkers, Rosliston Forestry Centre and Hicks Lodge National Forest Cycle Centre all offer safe, accessible trails and cycle hire is available at Hicks Lodge. Some of the area's country parks including Beacon Hill and Sence Valley also provide way marked accessible cycle trails. Bradgate Park currently allows cycling on tarmacked roads but is considering off road accessible trails. For road bikers, the 113 mile National Cycle Route 63 begins at Burton on Trent and follows along quiet lanes, linking up with Conkers.

The walking provision within The National Forest is also fairly extensive. The National Forest website includes 15 walks with additional walking offered within the country parks and around the reservoirs and lakes. The National Forest Way is a 75 mile linear route divided into 12 stages. The routes offer a wide range of distances for walkers, nearly all routes are on easy, flat or safe terrain and are accessible to a wide range of users.

A round 2 HLF application has been submitted which aims to improve orientation and interpretation in the heart of the Forest[5]. The proposed masterplan includes new signage, interpretation boards and on and off line information aimed at enhancing the experience for walkers, cyclists, local residents, visitors and schools.

Other activities include: fishing on rivers, lakes and reservoirs (23 locations are offered on The National Forest website); horse riding trails on woodland, farm and country park tracks; tank and off road driving and a ski and snowboard centre. Watersports on the reservoirs are restricted to club members.

Throughout the year there is a large and varied programme of small **events** which take place in towns, villages and venues across The National Forest. There are, however, two large regular public events: the National Wood Fair in Beacon Hill Country Park on August Bank Holiday, attracting 5,000 visitors and The National Forest Walking Festival over 13 days in May, organised by South Derbyshire District Council and supported by Leicestershire County Council and the National Forest Company.

There are a number of points which are significant when assessing the current attractions and activities on offer:

- whilst there is a wide range of visitor attractions which includes stately homes, visitor centres, museums and gardens, there are few which are of sufficient scale or uniqueness to draw visitors from beyond a 30 minute drive time and very few for which people would travel for over an hour[6]. From talking to operators, it seems that the majority of visitors set out to visit a single attraction and that the area does not yet have a reputation for

[5] Heart of the Forest Project, Orientation & Interpretation Masterplan, October 2014
[6] From discussions with operators. There is limited research data available for most attractions.

offering 'lots of things to do'. In other words, people are generally not heading to the area with an open agenda.

- The Heart of the Forest offers a good mix of family activities although the offer is fairly traditional and includes activities and attractions which can be found in most parts of the UK. Both Conkers and Rosliston require ongoing investment to continue to meet visitor expectations and are largely dependent on external funding sources to achieve this.
- other than relatively small scale ongoing product refreshment at existing attractions, there appears to be little major new attraction development in the pipeline. Calke Abbey has plans to develop a new 'hidden building' in the park with café, toilets and a multipurpose activity centre. A small visitor centre and café is also currently being discussed at The Outwoods. Conkers has been considering options for new product development for some time, potentially involving a development partner although, to date, a suitable opportunity has not been identified. Bradgate Park has plans for a new visitor centre to be delivered over two phases. Plans for the extension of Barton Marina include the introduction of a new hotel and potentially additional retail but, to date, a developer has not been secured. The National Memorial Arboretum has plans to build a new pavilion with a multipurpose functions space, interpretation, café and shop;
- the area has a small number of quarries and gravel pits which present potential opportunities for major development. Barton Quarry already offers angling and yachting facilities and has permissions for quiet watersports. Newbold is intended as a country park with a visitor centre. Both of these are long term projects, however, and are some decades away. The Staffordshire Wildlife Trust have recently purchased Trucklesholme Quarry with the intention of creating a new nature reserve in stages beginning within the next five years;
- The National Forest provides a reasonable range of sports and outdoor activities and, in particular, it offers a safe and accessible environment for walking and cycling. As with the family activities in general, however, there is little on offer which cannot be found elsewhere or is sufficiently special to encourage large numbers of people to travel any distance. The areas which are successfully developing their reputations as places for outdoor or indoor activity are increasingly seeking to attract the new breed of fun, accessible adventure activities which are popular with a fairly wide range of ages from children through to adults. (See Appendix E);
- The National Forest Way is an important initiative and one which could encourage a wide range of people to explore the area. At present, however, it is a largely linear route which requires people either to walk short sections out and back, or to arrange transport from the finish back to the start. Unlike some other national walking routes, the terrain and views are unlikely to be sufficiently compelling to encourage large numbers to see the full journey as a challenge. The introduction of more loops and circular sections would almost certainly encourage greater use.
- The two large annual events are very well suited to the area and support The National Forest brand and its natural strengths. The area does not, however, regularly host high

profile 'footloose' sporting events which would attract new users (competitors and visitors) and raise the profile of the area[7]. There are also no major regular festivals.

- The National Forest area as a whole offers very few towns and villages which act as natural visitor hubs. The importance of places like Bakewell and Ashbourne in the Peak District, for example, should not be underestimated. Whilst many visitors to the national park may say that they are drawn by the beauty of the natural environment, many will spend most of their time and money pottering round pretty towns and villages, eating in tea rooms, shopping and browsing. These hubs form the focal point of the visit to the destination. Within The National Forest, Conkers, Calke Abbey and Barton Marina act as hubs for certain types of visitors but they do not offer the same breadth or type of experience as an attractive town or village. Ashby de la Zouch, Melbourne, Tutbury (which is outside of The National Forest area) and Staunton Harold are generally considered by stakeholders to be the most appealing visitor destinations and, although there is no data available, they are likely to be attracting some day visits. The National Brewing Centre is also probably encouraging some out-of-area visitors to explore Burton. Working with Local Authority partners to encourage a small number of destinations to develop their offer for visitors could, over time, improve the appeal of these potential hubs.

5.3 Marketing and Positioning Review

5.3.1 Awareness

Comprehensive research is not available on perceptions of The National Forest. Available research and evidence[8] highlights that broad awareness of The National Forest has increased since 2006. However, awareness of where The National Forest is and what is in it is low.

The barriers that were thought to exist included: a lack of awareness; being an undefined area (the area is better known for specific attractions within it than The National Forest) and competition from other destinations – for example, the Peak District.

5.3.2 Online Marketing

Any Google search involving the term 'National Forest' will return The National Forest website and/or its relevant pages (for example, visit). Searches for things of visitor interest in The National Forest yields more mixed results. For the main attractions (like Calke Abbey, Bradgate Park and Rosliston) The National Forest site will typically feature in the first page of Google returns (Conkers is an exception – mainly due to its broader meaning/usage). However, for accommodation related searches (when The National Forest is not included in the search) The National Forest site does not feature – typically, a search will return either individual establishments in the specific area or third party accommodation booking sites.

[7] Some smaller scale sporting events such as the Addidas 24 Hour Thunder Run already take place at Catton Hall.

[8] Impact of Sustainability and Greening Issues on Tourism Visits (QA Research 2007. Based on two focus groups in Derby – empty nesters and caring parents) and The National Forest Location Study (TNS 2012 – based on an omnibus home survey (sample = 2009 people).

At present, The National Forest's tourism site lacks inspiration. Content, on balance, is supply-led – a bit 'something for everyone' rather than market focused. The site is also weak in some areas in providing really usable information at the Planning and In Destination stages of the customer journey – this is particularly the case in terms of walking and cycling activities. It is, however, currently under re-construction, focusing on key themes like things to do, forest experiences, time with the family, where to stay, closer to nature, outdoor leisure activity, food and drink and The National Forest Way.

Among Local Authorities and DMOs, tourism content coverage of The National Forest is patchy. It is strongest on the East Staffs, Lichfield, North West Leicestershire, South Derbyshire and Enjoy Staffordshire sites but, even here, The National Forest is typically positioned as simply an attraction within the respective area and not a wider destination or a central part of the pull of the area. South Derbyshire is the exception and, within this site, The National Forest is positioned as the central destination / brand.

5.3.3 Print

The National Forest and Beyond range of print is of high quality in terms of imagery and the themes used and its support of the brand development. However, despite the positive findings of the 2012 Conversion research, there is a question over the continued efficiency of the main Visitor Guide in terms of how well it is distributed and used in a web / mobile age. The operator survey (and 2012 conversion survey) supports this and it was not seen as an effective form of marketing for the accommodation sector. The resource involved (financial and time) could be better employed supporting a digital campaign.

The attractions guide, targeting a day visitor audience, has a stronger rationale and the operator research indicates attraction operators tend to value it as a marketing tool (albeit this may also reflect its cost effectiveness combined with the main guide).

6 Summary SWOT analysis

Based on all of the above information, the following table summarises the key strengths, weaknesses, opportunities and threats for The National Forest.

Strengths	Weaknesses
• Already an important recreational asset for people living around the area. • Fairly broad range of family based activities. • Fairly wide range of accessible outdoor activities for people of all ages. • Area embraces a wide range of different places and venues. • TNF is built on green credentials which underpin everything it does. • There is long term strategy for increased forest cover and ongoing regeneration. • There is now a strong relationship between TNFC and key stakeholders. • Existing range of accommodation which includes independent and branded hotels, B&Bs, guest houses, self-catering and camping/ caravan sites. • Existing range of attraction and leisure assets including some nationally significant attractions: St George's Park; Calke Abbey; Conkers; National Memorial Arboretum; Rosliston Forestry Centre; Bradgate Park; the reservoirs etc.	• Lack of coherence and connectivity across TNF area. The area is not currently perceived as a single destination. • Lack of major accommodation draws. • Lack of special attractions. • Variable quality of existing accommodation and attractions. • Need for investment in existing accommodation and attractions. • Flat and relatively uninteresting landscape. • Not perceived as a destination for staying visits. • Decline in day visits. • Day visits tend to be made to individual attractions rather than to 'the destination' as a whole which limits cross selling benefits. • Area straddles a number of public authority boundaries which makes development and progress more difficult. • Limited marketing budget and over reliance on print-based media. • TNF brand is not used consistently and is probably not widely recognized.

Opportunities	Threats
• Access to a very large market. • Availability of land suitable for development. • Planning policy which supports appropriate development. • Growth in demand for domestic visits (day and staying). • Growth in awareness of health issues and need for outdoor activities. • Reputation of the Heart of The Forest as a family activity destination which could be built on. • Reputation of the Forest as a place for outdoor activity which is accessible to all. • Opportunities for water-based activities. • Desire amongst stakeholders to continue to develop and build the visitor economy. • Good relationship between public and private sector partners.	• Current lack of demand for leisure staying visits which will limit the ability to develop new accommodation. • Challenge of creating sustainable visitor attractions (nationally) and the lack of developers in this market. • Fragmented land ownership means development will always require long term planning and collaboration. • Questions around the extent to which TNF brand will ever be genuinely recognized by visitors across the whole area. • Competition from regenerated urban destinations which continue to attract major new investment. • Competition from other rural destinations such as national parks which have more appealing natural environments.

7 Taking shape

In this final section of the Situation Report, we consider what the research, consultation, product assessment and market trends are suggesting and how this could influence the strategic direction for the visitor economy over the next ten years.

Working with the National Forest Company, we will discuss and test this emerging thinking with key stakeholders before producing the draft of the final Destination Development and Management Plan.

7.1 Current position and future direction

The National Forest Company and its partners have clearly made a lot of progress from a standing start in the last twenty years. There is a strong body of support from stakeholders and a shared desire to continue to grow and exploit the value of the visitor economy.

What is also clear, both from consultation with stakeholders and from looking at successes elsewhere, is that **The National Forest needs to focus on the areas of genuine strength in order to deliver this growth**.

The National Forest 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.

There is perhaps more value in looking at how regenerated cities like Liverpool, Manchester and Newcastle have used investment in accommodation, attractions, events and marketing to establish themselves firmly on the domestic short break 'must visit' list (see Appendix B).

There are, of course, some important differences between The National Forest and these cities but the basic principles of destination development are the same:

- identify a distinctive proposition which is grounded in genuine recognised strengths;
- work hard at attracting major investment into a few big, notable development schemes; and
- secure funds to support the critical visitor infrastructure which includes bidding for events, improving the consistency of the visitor experience and targeted marketing aimed at viable market segments.

The National Forest's previous and current strategies are already built on these principles to some extent. Greater clarity and a more focused expression of what this means, however, is needed to underpin the Destination Management Plan for the next phase.

It is important that The National Forest is clear about its three major competitive advantages:

- it is an area which already has a good range of outdoor activities and attractions for families and offers accessible outdoor recreation for people of all ages;
- it is an area which is very accessible to a large percentage of the English population;

- and it is an area which has available land and a policy of encouraging and facilitating appropriate development.

To move over the next ten years from 'emerging destination' to 'recognised destination', a really proactive approach is needed to attract large scale investment into a wider range of high quality, unusual or special forest or woodland attractions, activities, events and visitor accommodation. These major development schemes will allow The National Forest to exploit its access to a mass market and create a distinctive position as a destination.

This direction in essence continues to build on what The National Forest has been doing over the first twenty years of its existence. It was created as a large scale, ambitious scheme and, over the years, has had a number of successes in delivering major investment projects. We believe that it is important that this scale of ambition is not lost. The strategy for the next ten years should focus on securing the next generation of major leisure attractions and accommodation.

We also believe that it is important that the National Forest Company and its partners have a succinct, credible and deliverable position firmly in mind. We suggest that this should be that:

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.

This position assumes a number of things:

- that The National Forest as a destination will 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 suggest that the destination is more than a niche offer (although there will always be individual businesses which will target specific niche markets);
- that this will be a **long term strategy** which will take time and consistent application to achieve but that all the necessary and possible actions will be taken to enable this '**big thinking' vision** to be realised; and
- in the meantime, The National Forest will implement a range of short term measures to **exploit the value of its existing visitor economy offer**. This will not only continue to boost the local economy in the short to medium term but will help to make the delivery of the longer term vision achievable.

In the sections which follow, we summarise the key development opportunities which could form the basis of the Action Plan[9].

7.2 Visitor accommodation development opportunities

Increasing short break and holiday business is a key objective going forward. New accommodation provision with strong appeal for leisure breaks and holidays that is closely related to The National Forest and can be influenced by its continuing development will be a key requirement in this respect. The priorities and strongest potential will be for:

[9] At this stage, we are aiming to identify the core areas for development rather than a comprehensive list of development actions.

- non-serviced accommodation;
- accommodation in woodland or waterside settings;
- accommodation linked to outdoor activities;
- family-orientated accommodation;
- group and youth accommodation; and
- accommodation with strong environmental credentials.

Key opportunities will be for:

- a gradual increase in holiday cottage barn conversions - particularly in terms of holiday cottage complexes ideally with leisure and large properties that can cater for family and friend get-togethers and celebrations
- some additional provision in terms of holiday lodges - both individual units and small complexes;
- large-scale holiday/eco lodge parks with central leisure, sports and catering facilities;
- fishing lodges;
- a few more small touring caravan and camping sites;
- some camping pod developments;
- glamping sites;
- treehouses;
- children's activity holiday centres; and
- outdoor education and field study centres.

A number of proposals for new holiday lodges, log cabins and self-catering barn conversions have been granted planning permission across The National Forest. Several land owners who responded to our online survey and consultations expressed interest in bringing forward glamping, camping pod, caravan and camping site and holiday lodge development projects, including a large-scale development in one case. A national holiday lodge park operator expressed interest in developing a large-scale holiday lodge park in The National Forest area, given a suitable site.

The current performance of small-scale, non-serviced accommodation businesses points to a need **for relatively slow, incremental supply growth**. Care will be needed not to encourage too rapid an expansion of stock and to give clear information on realistic business performance potential to those who may be contemplating investment in the development of such accommodation. The priority should be to encourage more non-serviced accommodation in those parts of The National Forest area that currently have limited provision of such accommodation, in particular, Charnwood and Needwood Forests.

Our research and consultations suggest potential for some non-serviced accommodation developments of significant scale that might include a mix of different types of accommodation and on-site leisure, sports, catering and entertainment facilities. Such developments would function very much as destinations in their own right, could attract substantial commercial investment and would contribute to achieving a step change in the volume of short break and holiday business in The National Forest. They would also generate significant new employment and could play a role in increasing tree cover. Therefore, bringing forward such schemes should be a key priority going forward but will require sustained action by the National Forest Company and its partners if they are to be successfully delivered.

There are some pipeline proposals for new hotels in The National Forest area and further proposals could come forward for budget hotels, for example, at Ashby de la Zouch, Swadlincote or Coalville, however, such hotel development would be unrelated to The National Forest. There could be scope for a major golf resort in The National Forest area (given a suitable site), the development of hotels and golf lodges on golf courses, or country house hotels (given suitable properties for conversion). Again, such developments are unlikely to be driven by The National Forest.

Other accommodation development requirements and opportunities are in terms of:

- encouraging the opening of new bed and breakfast establishments to replace those that close;
- the potential development of more good quality pub accommodation;
- encouraging accommodation provision on the National Forest Way; and
- the need for the upgrading of most independent hotels and guest houses and some bed and breakfast accommodation, self-catering accommodation and touring caravan and camping sites.

Most accommodation operators appear to recognise the need for improvement and many have plans for investment. Current performance levels suggest that many independent accommodation businesses in The National Forest area are not generating sufficient profits to radically change their offer. Some appear to be stuck in a downward cycle of poor quality, low prices and reducing profits. The process of improvement is likely to be slow and challenging for some accommodation businesses.

7.3 Visitor attraction and activities development opportunities

Improving and developing the visitor attraction and activities offer will play a key role in arresting the decline in day visits and realising the potential of the large market on the doorstep.

The development plan will have three interlinked key actions in relation to visitor attractions, namely to:

- provide support for the refreshment and development of existing attractions, which may include identifying land on these existing attraction sites and helping to secure private sector development partners;

- identify potential major commercial leisure partners which are 'on brand' with The National Forest i.e. suppliers of family activity or adventure activity products. Suitable sites should be identified and proactive approaches be made; and
- ensure that there is an environment which encourages development plans to come forward from new or existing operators or developers.

Specifically, we see the following type of development opportunity as presenting the most valuable and viable proposition for The National Forest:

- high ropes course developers which do not require mature trees (there are several of these);
- freestyle trampoline experience developers. These would probably require indoor accommodation);
- big scale zip wire experience developers, potentially initially from a touring operator;
- adventure golf developers;
- Bewilderwood. This attraction is currently operated by a private landowner in Norfolk. He has been in dialogue with Cheshire East Council (CEC) for several years about developing a second site at Tatton Park. The Council has been facing significant opposition to the plans from local residents and, if these cannot be overcome, The National Forest could provide a viable alternative location. (It should be noted that CEC was proposing to fund part of the capital development and, therefore, funding would almost certainly be required to attract the development. The scheme could be eligible for funding from various sources, however, on the basis of job creation and economic development); and
- smaller scale add-on activities which are not attractors in themselves but could add income and excitement to existing attractions or major new attractions including: indoor caving; climbing walks; Segway trails; zorbing; tree top walks. Whilst these types of development are likely to be easier to attract than the major attractions, they will not, in themselves deliver a step change in experience or halt the decline in day visits.

Appendix H provides names of the developers who will be approached and 'soft tested' although it will be useful to have identified some potential sites to discuss on an indicative basis at the next stage.

At this stage, we think it is unlikely that major watersports developers (such as Wavegarden) would be attracted to the area although we will consult further with the reservoir and quarry owners/ operators[10].

[10] Smaller scale watersports (such as kayaking and rowing) are often not economically viable and are usually run as small lifestyle businesses or by the public sector. As such, whilst they could contribute to the overall offer, they are unlikely to assist in delivering growth in The National Forest.

7.4 Event development opportunities

A major family focused festival would generate significant footfall and economic benefit over the duration of the event but would equally importantly raise the profile of The National Forest as a destination.

Although many festivals are one-offs (rather than chains) there are some examples of festival organisers who run festivals on more than one site in a year.

We recommend a dialogue with the organisers of the five major family festivals, Latitude, Womad, Camp Bestival, Green Man and Just So, to find out what is required to organise a similar event and potentially to identify if there is any interest from them (or other organisers they might be aware of) in an event in The National Forest.

It would also be valuable to have potential sites identified prior to any discussions. These could include Bradgate Park, Catton Hall or other country parks.

7.5 Destination hub development opportunities

Encouraging the towns and villages which have some natural appeal to visitors to improve their tourism offer will 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 upon and those which do not.

The places which appear to offer some potential as visitor hubs or 'honeypots' are:

- Ashby de la Zouch;
- Staunton Harold;
- the villages around Charnwood; and
- Burton.

The Local Authorities with responsibility for these places should be encouraged to develop Destination Development Plans which focus on improving the core elements of the visitor experience namely: independent retail; food and drink; pubs; visitor information; visitor accommodation; signage, toilets and parking. The National Forest Company could work with the relevant departments/ individuals in the Local Authorities and Destination Management Organisations (DMOs) to ensure consistency of approach.

7.6 Marketing development opportunities

Funding is always going to be limited for marketing The National Forest (as it is for most destinations). The emphasis therefore needs to be on:

- finding ways of working more effectively with Local Authority partners to allow businesses to contribute to marketing campaigns. This will include development of joint membership schemes between The National Forest Company and its Local Authority partners;

- refocusing marketing campaigns away from print to online media. This should not just rely on a website but will need to embrace effective forms of proactive online advertising. (Destinations like Blackpool have proved the effectiveness of targeted online advertising based on consumers' previous search history for example). This could also enable more cost effective analysis of campaign monitoring;
- sales of 'packages' through the website, targeted at the major development markets: domestic family day visits; domestic family overnight visits; empty nest accessible activity-based overnight visits. (Leicestershire Promotions have had some success at developing these as an example).

7.7 Visitor infrastructure development opportunities

In nearly all cases, the National Forest Company will need to work with Local Authority partners to address the weaknesses and gaps in the current visitor experience. These include:

- business support schemes (for example, building on the scheme run by the Staffordshire DMO with European Regional Development Funding (ERDF) funding);
- improving public transport links and specific services and timetables which meet visitor's needs (such as bike racks on buses and joined up multi-transport timetable information);
- developing local food and drink supplier networks and promotion; and
- visitor information provision.

8 Next steps

This Situation Report should provide the basis for discussion with key stakeholders about the vision for the next ten year strategy.

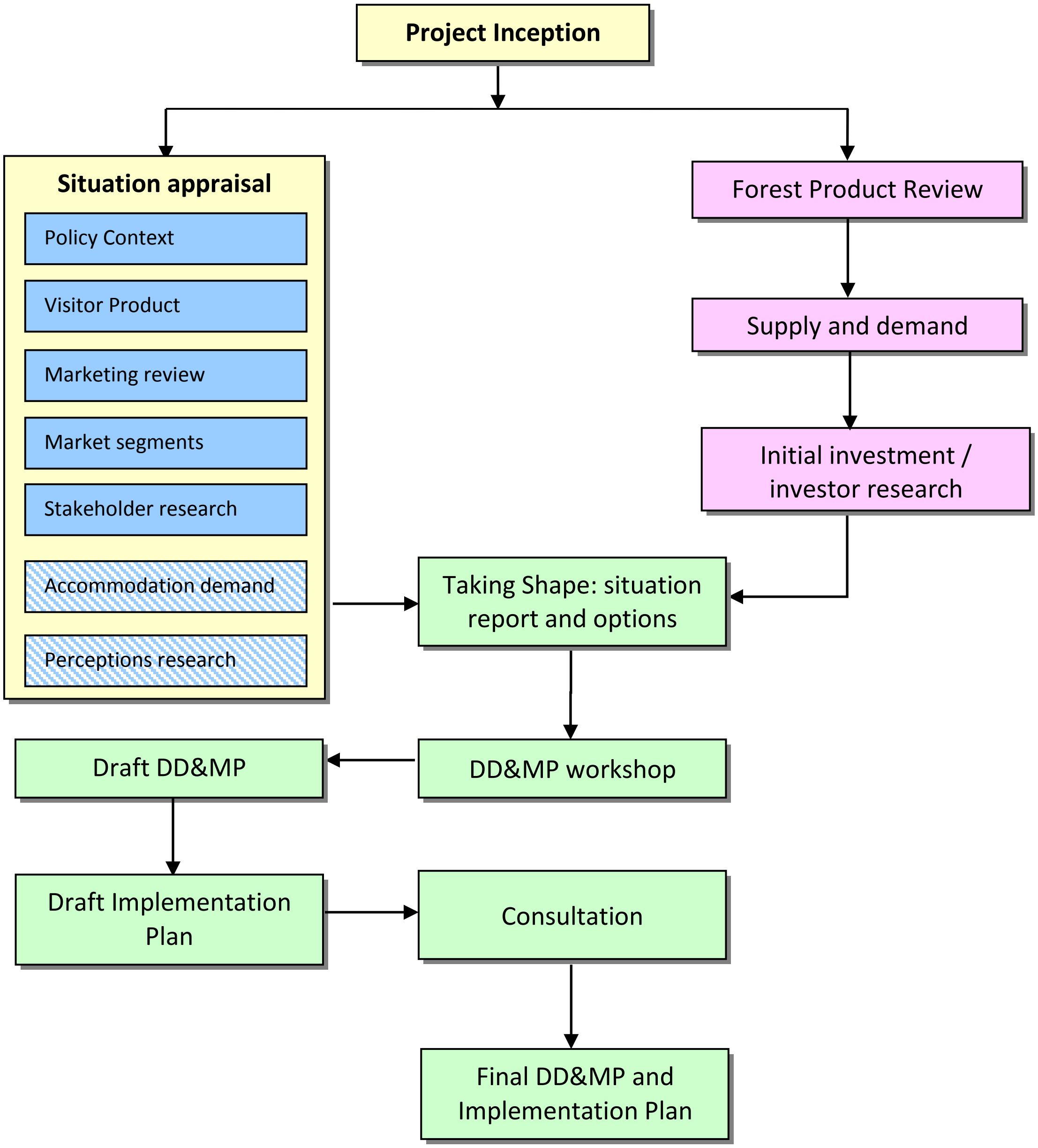
The following is the suggested process for the next stages of this work:

- The National Forest Company should consider and comment on the proposed approach. In particular, we would highlight the importance of the more succinct vision and the key recommendations for development in this report;
- we will refine and amend in light of feedback;
- with The National Forest Company we will test the key areas with stakeholders in late February; and
- after receiving further stakeholder feedback we will:
  - carry out soft market testing as identified;
  - based on the findings in this paper, any subsequent refinements and the soft market testing, produce a draft Destination Development and Management Plan and supporting Action Plan. This will focus, in particular, on the actions required to deliver the Plan and we will work these actions up in more detail. It will also consider future delivery structures;
  - invite feedback from The National Forest Company and a selected list of key stakeholders on the draft Plan. (Extensive consultation at this stage should not be necessary given the consultation already undertaken); and
  - refine the draft in light of feedback and produce the final document.

Appendix A – Study Methodology

Approach

Tasks


Project Inception
Situation appraisal
Policy Context
Visitor Product
Marketing review
Market segments
Stakeholder research
Accommodation demand
Perceptions research
Forest Product Review
Supply and demand
Initial investment / investor research
Taking Shape: situation report and options
DD&MP workshop
Draft DD&MP
Draft Implementation Plan
Consultation
Final DD&MP and Implementation Plan

Appendix B – National context and trends

National demographic trends

- **An ageing population –** the generation known as the 'baby boomers' are at the time in their lives where they are about to retire. This generation is very different to the retired generations of the last twenty years. They prioritise and protect their expenditure on leisure, tourism and recreation. They are more affluent and discerning than the previous generations. They also have a longer life expectancy. This generation is much more technologically savvy than the previous generation of retirees. They are also more likely than the previous generation to organise their own travel arrangements as opposed to using travel agents, packages or tours. As people get older, they are less likely to travel long distances.
- **Changing family structure** – UK family life is very different to that of 20 or 30 years ago. There are now many more single parent households. There are also many more people who have re-married, creating extended families and there are now many more gay parents. Families also have fewer children than in the past. Linked to the ageing population, grand-parents and even great grand-parents now play a much more active role in the upbringing of their grandchildren often providing pre-school care. Families are much more likely to take holidays and days out with grandparents than in the past.
- **Dispersed families** – it is much more common for people to live away from the place of their birth or the place in which they grew up. People today have a much greater propensity to move away for work or education. This means that, in some cases, families see much less of each other than previous generations. Large family functions, get-togethers and occasions such as weddings have an increased importance in this context.
- **A more diverse population** – the proportion of black and minority ethnic people has increased from 6% to 14% between 1991 and 2011[11]. Similarly, the proportion of people born outside of the UK has increased from 7% to 13% between 1991 and 2011[12]. This has had a particular impact on the number of people coming to the UK to visit friends and relatives.

Post recessionary leisure trends

- **Prioritising leisure spend** - whilst there is no doubt that consumers have had to tighten their belts over the last six or seven years, there are elements of the tourism and leisure industry that have remained resilient, with certain sectors and organisations even *thriving*. This reflects a broader societal shift that has taken place over the last 20 - 30 years. Leisure, recreation, tourism and culture were once seen as 'discretionary spend items'. Today, however, they are viewed by many consumers as essential. Taking short breaks, eating out and visiting attractions have become a normal part of life for many people in a way that wasn't seen 30 years ago.

[11] UK Census 2011
[12] UK Census 2011

- **More discerning customers** - the economic downturn has brought about a more discerning nature amongst leisure consumers as the 'cash-rich, time-poor' society of the middle of the last decade has given way to a 'cash-tight, time-poor' society of today. Consumers vote with their feet, spending time and money only at venues that provide quality and value for money. Consumers are less willing to 'try things out' or give somewhere a 'second chance'. They want to be assured that their precious time and limited cash will be spent at a venue that represents excellent value for money and provides an excellent experience. Those venues that have invested in high quality experiences are benefitting. There are many poor quality operators that have left the industry over the last six years.

- **Pre-trip research –** the ever-growing popularity of Tripadvisor and other consumer review sites reflects the discerning nature of consumers today. Tripadvisor has fundamentally changed the way in which people research and book their trips (accommodation, attractions and restaurants in particular). Customers no longer rely on *professional* reviews such as guide books, hotel gradings or newspaper reviews in the way that they did in the days before the internet. With over 150 million people using Tripadvisor each month and 115 new reviews every minute, operators have had no choice but to embrace it.

- **The importance of a 'good deal' –** special offers, deals and discounts have become a fact of life for many operators within the sector. A sensible strategy can work well in off-peak periods and by encouraging multiple visits but it has led to serious problems for some operators who came to rely on the discount to drive volume. Research undertaken by Mintel in 2013[13] revealed that 44% of people who visit attractions usually try to find special offers, deals or discounts before visiting a particular attraction.

- **Memberships, season tickets and annual passes –** linked to the appetite amongst consumers for a 'good deal' is the rise of memberships, season tickets and annual passes. A well-priced annual pass can represent excellent value for money especially when it allows entry to a number of different venues. Historic properties, zoos and theme parks have used them to good effect and have seen significant increases in volume as a result.

- **Cultural capital –** there has been a trend away from conspicuous consumption or frivolous spending. One particular trend has been towards *cultural capital* i.e. using holidays to learn new skills, undertake activities, engage in crafts and hobbies or acquire new knowledge.

- **100% internet penetration –** virtually all UK consumers now have access to the internet. Older consumers still tend to use the internet more for practical things such as banking, booking travel and email but are less likely to use it for social media, socialising and gaming.

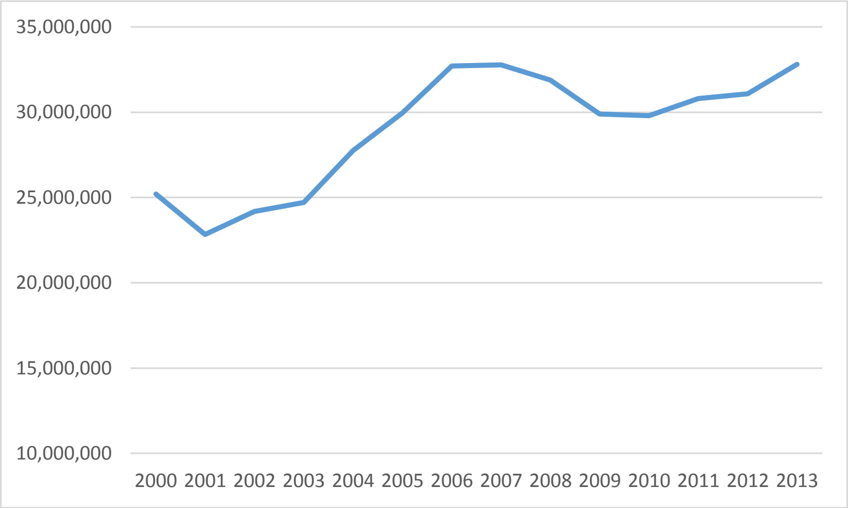
- **Mobile and tablet –** most internet usage will shift towards mobile and tablet devices in the near future. This has implications for site design and functionality. Customers have also come to expect good Wi-Fi connections in hotels, restaurants, cafes and attractions.

[13] Visitor Attractions, Mintel, 2013

UK inbound tourism trends[14]

- **Strong and sustained growth –** the number of tourists coming to the UK from overseas grew significantly between 2002 and 2007 from 24m to 33m. Between 2007 and 2010, this fell to 30m but, between 2010 and 2013, this lost ground was recovered and the number of inbound tourists in 2013 was almost 33m.

Figure 1: Number of inbound tourists to the UK 2000 - 2013

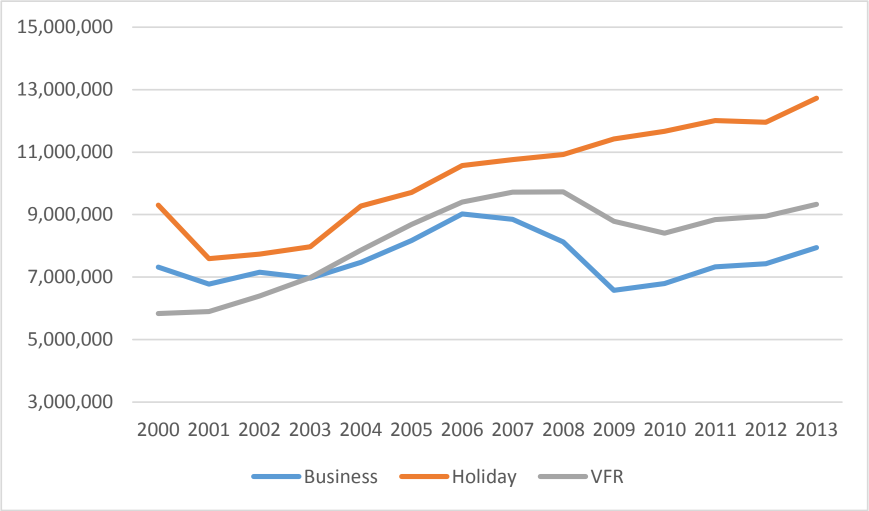


Source: International Passenger Survey, Office for National Statistics

- **Holidays trips to the UK particularly strong –** behind the top line trend, **holiday** trips to the UK have increased very significantly over the last ten years by 65% from 7.7m to 12.7m.
- **Some decline in business trips –** Business trips to the UK grew from 7m in 2002 to 9m in 2006 and then declined to about 6.8m in 2010. There has been some growth in the last three years to around 8m business trips in 2013.

[14] Taken from International Passenger Survey 2013, Travel Trends, Office for National Statistics

Figure 2: Inbound tourists to the UK 2000 – 2013 by purpose of trip



Source: International Passenger Survey, Office for National Statistics

- **Growth markets –** the top inbound markets for holidays are France, Germany, USA and Ireland (although visits from the USA and Ireland have seen a big decline since 2006). Other growth markets over the last five years include: Belgium, Italy, Denmark and Australia. Strong growth is also being seen from China, Russia, India, Brazil and the Middle East but from a low base.

- **London is the destination of choice –** the number of overseas tourists staying in London far outweighs any other UK destination. 50% of all tourists to the UK stay in London which is around 16m tourists. Edinburgh, Manchester, Birmingham and Liverpool are next with 3.5m visits collectively which has grown by 1m over ten years. Traditional destinations like York, Bath and Stratford have seen some long term decline. The competing (branded) accommodation offer in major cities is probably a contributory factor to this.

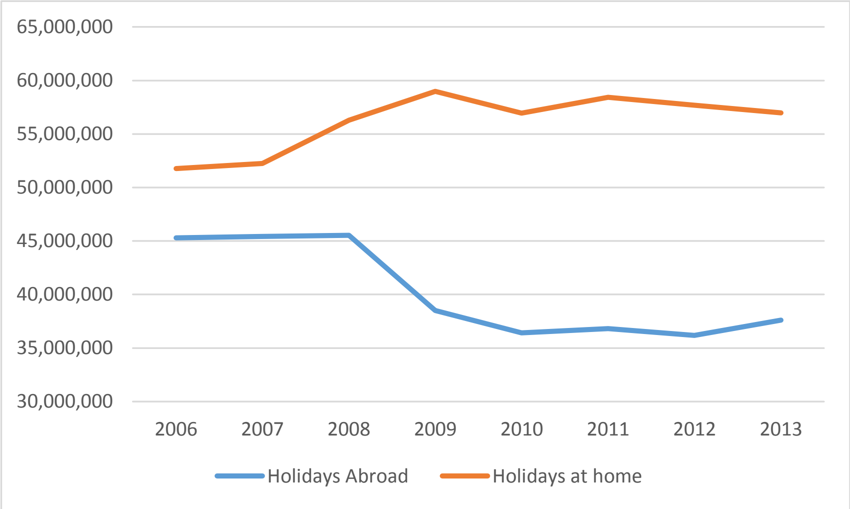
- **Motivations for visiting UK –** international tourists give the following motivations for visiting the UK: built heritage, cultural heritage, contemporary culture, sport and shopping. Whilst overseas tourists want to ‘see the sights’ in the UK they also come to indulge themselves and seek luxury, authenticity, health and wellbeing.

UK domestic tourism trends[15]

- **Staycation here to stay –** UK domestic tourism (UK residents taking holidays in the UK) has thrived over the last five or six years giving rise to the term, ‘staycation’. The number of holiday trips taken by UK residents grew by 15% between 2008 and 2013. Over the same period, the number of holiday trips taken abroad has fallen by 20%.

[15] Taken from Great Britain Tourism Survey 2013, Visit England.

Figure 3: Number of holidays taken at home compared to holidays taken abroad 2006 - 2013



Source: Great Britain Tourism Survey, Visit England and International Passenger Survey, Office for National Statistics

- **Urban destinations thriving –** city and urban destinations appear to be driving the growth in domestic tourism with London, Manchester, Liverpool and Birmingham performing well. Oxford, Leeds and Milton Keynes have also seen strong growth. Traditional seaside destinations or heritage destinations, such as Southport, Blackpool, Newquay, Torquay, and Stratford upon Avon have seen declining or stagnant numbers of domestic tourists.
- **Short breaks are getting shorter –** many city breaks are only for one night. Manchester, for example, has a very short average length of stay with visitors motivated by shopping, football and nightlife.
- **Dominance of the car –** the car remains the preferred form of transport when taking a short break in the UK. 80% of tourists take their car.
- **The rise of self-catering –** there is a particular trend towards large groups holidaying together in the UK, such as extended families, groups of families or large groups of friends without children. Lodges, self-catering cottages and luxury camping (yurts and glamping) have all proved to be popular in recent years. The four Center Parcs resorts in the UK (as an example) have traded at around 95% occupancy throughout the last few years with the company opening a fifth site in 2014.
- **Major attractions becoming resort destinations –** Drayton Manor Theme Park, LEGOLAND Windsor, Chessington World of Adventures and Gullivers World Theme Park have all made major investments in on-site hotels over the last five years reflecting the ‘staycation’ trend and the appetite amongst the family market for extending the stay at leisure attractions. Many other major visitor attractions are investigating on-site hotels and accommodation.

Liverpool tourism case study

Liverpool has seen a phenomenal growth in the number of tourists visiting the city over the past fifteen years. It now ranks as the fifth most visited destination in the UK, both in terms of domestic visitors and visitors from overseas.

2.2 million people stayed in the city in 2013. 75% of these visitors came from the UK and 25% came from overseas. Only 20% of visitors came to Liverpool for business purposes meaning that the vast majority of visits are for holiday or leisure purposes. Average weekend occupancy rates in Liverpool are around 85%. In addition, Liverpool now attracts around 31 million day visitors per annum.

The number of staying visitors in Liverpool has increased by 60% (from 1.4m to 2.2m) over the last ten years whilst the number of day visitors has increased by 55% (from 20m to 31m).

The very significant growth in tourism which has created many thousands of jobs did not happen fortuitously. It was planned and encouraged and much of it can be linked to the physical regeneration of the city.

In one sense, Liverpool had a head start with a number of cultural and heritage assets such as the Beatles, the football clubs, the cathedrals, the river, the ferries, the museums and the theatres. For many years however, it lacked the basic infrastructure that was required to attract visitors, most notably hotels.

With a concerted programme of regeneration and development orchestrated largely by the public sector, Liverpool was beginning to see a reversal of fortunes by the early 2000s. It had secured the European Capital of Culture (for 2008) and a deal with property developers had been signed to build the £1bn Liverpool One retail complex to open in time for 2008. Tourism was seen as a real engine of growth for the city. The council and the regional development agency identified priorities and actions which would help the visitor economy to flourish.

New hotels have been developed at a very significant pace. Ten years ago, there were 2,500 hotel rooms available in Liverpool mainly in low quality unbranded facilities. Today there are 6,500 hotel rooms in Liverpool with an offer that ranges from branded budget hotels to four star brands such as Marriott, Crowne Plaze, Radisson, Hilton and Malmaison. New visitor attractions, infrastructure and facilities have emerged such as the Museum of Liverpool, the Echo Arena, the new cruise terminal as well visitor signage, tourist information centres, refurbished railway station and a programme of major events and festivals.

In addition to the public and private sector investment that went into hotels, attractions, retail, entertainment and visitor facilities, significant investment went into the public realm to make the city centre a more attractive place to be and to remedy the dereliction of the 1970s and 1980s.

To complement all of the investment, a sustained and well-funded programme of marketing has continued over the course of the last ten years to position Liverpool as an international tourism destination.

Appendix C – The National Forest Vision and Action Plan for Sustainable Tourism 2009 - Action Areas

Action points		
No	**Action point**	**Priority**
Strategic objective 1: Developing a high quality, good value visitor experience		
1	Maintain, monitor and extend production and dissemination of tourist information	1
2	Develop a short 'local information' course, supported by familiarisation trips for key people who interact with visitors in their place of work	2
3	Review the strategy for information provision across TNF every five years	2
4	Work with highway authorities to review tourism signposting policy and provision of new branded signs	2
5	Prepare visitor accommodation market review, clarify planning policy and identify potential hotel and holiday village development sites	1
6	Support the upgrading of visitor accommodation as appropriate, including the provision of meeting facilities	1
7	Support the planning, development and maintenance of a Forest-wide network of public waymarked footpaths; multi-use and all-abilities trails and related services	1
8	Support the maintenance and development of the canal network and related facilities and services, including the restoration of the Ashby Canal	2
9	Review the opportunities for new (and improved access to) high quality, sustainable outdoor activity facilities	1
10	Prepare an events strategy with a view to identifying new opportunities Review every three years	1
11	Support the development of the Heart of the Forest and upgrading of the major gateway attractions	1
12	Co-ordinate the presentation and interpretation of TNF in all attractions	2
13	Review the opportunities for, and support appropriate attraction enhancement and new attraction developments at key locations	2
14	Support initiatives to improve the quality and distinctiveness of catering and retailing in town centres and at attractions and events	1
15	Support TNF food/craft producers, fostering networks and promoting quality standards	2
Strategic objective 2: Enhancing the environment and infrastructure		
16	Plan and implement landscape and environmental improvements on key arterial routes, including the A38 and A511 through TNF	2
17	Support the development – and maintenance – of high quality urban environments in towns and villages with local themes, including appropriate landscaping	1

Action points		
No	**Action point**	**Priority**
Strategic objective 1: Developing a high quality, good value visitor experience		
18	Support continual improvement of public transport provision for, and promotion to, visitors within TNF, linking gateway towns and attractions	1
19	Support new public transport initiatives that will improve access for visitors travelling to TNF	2
20	Engage with all tourism facilities (attractions and accommodation) to encourage and facilitate appropriate environmental management of their sites	1
Strategic objective 3: Improving business practice and performance		
21	Undertake a training and skills needs analysis	2
22	Prepare a tourism awareness campaign for local businesses and residents – including schools and colleges	1
Strategic objective 4: Stepping up the marketing effort		
23	Prepare marketing framework with other tourism marketing agencies and review promotional plan on regular basis	1
24	Develop the destination brand concept and encourage its use by stakeholders	1
Strategic objective 5: Working together effectively		
25	Review options for tourism organisation in TNF	1
26	Set benchmarks, agree performance indicators and set appropriate targets	1
27	Establish and implement a research programme	1

Appendix D – Summary of policies

Nationally

Nationally the policy is provided by two documents. The **Government Tourism Policy** (DCMS – March 2011) highlights the growth potential of the domestic tourism industry. The policy aims to:

- fund the most ambitious marketing campaign ever to attract visitors to the UK after 2012. The £100m campaign, co-funded by the government and the private sector, aims to attract 4 million extra visitors to Britain over the next four years;
- increase the proportion of UK residents who holiday in the UK to match those who holiday abroad each year; and
- improve the sector's productivity to become one of the top five most efficient and competitive visitor economies in the world.

The policy identifies that destinations are not effectively marketed and long term planning is hard due to uncertainties in public funding. The emphasis is therefore on creating smaller, highly focused, industry-led partnerships between tourism firms and government and broadening the tourism offer by creating alternative destinations which match London. The intention is to create DMOs (Destination ***Management*** Organisations) which are industry-led with boundaries defined by industry - not administrative boundaries.

Other proposed initiatives include reviewing Bank Holidays and white on brown signs, giving consumers and industry responsibility for quality grading, increasing apprenticeships, making visas easier to obtain, cutting passport control queues and helping industry prepare for technological change.

VisitEngland's Strategic Framework for Tourism (2010-20) aims for 5% growth per annum to 2020 and identifies four objectives namely to:

1. increase England's share of global visitor markets through collaborative marketing campaigns, an 'attract and disperse' approach domestically and utilising technology;
2. offer compelling destinations through effective, integrated visitor management, regeneration, world class accommodation and customer service;
3. champion a thriving industry through relationship across different bodies and sectors, research and intelligence, training and wise growth; and
4. facilitate greater engagement between the visitor and experience through modern information provision, welcome at 'gateways', improved transport provision and access for disabled people.

Regionally

The National Forest falls within four **LEP** areas – Leicester and Leicestershire LEP, D2N2 LEP, Stoke and Staffordshire LEP, and Greater Birmingham and Solihull LEP.

In physical terms **the Leicestershire and Leicester LEP** covers the largest part of The National Forest. Their Economic Development Strategy (2011 to 2030) recognises significant opportunities to develop sustainable tourism and employment creation, particularly in relation to The National Forest. Measures and priorities are typically thematic and cross cutting or sector specific. Tourism, per se, does not feature strongly although Priority A2

(Stimulating innovation and creativity) identifies a need to focus support on emerging businesses where there is specific expertise and capabilities – these include (among others) tourism businesses (including culture and sport businesses).

The **Stoke and Staffordshire** Strategic Economic plan recognises tourism as a key sector with economic growth potential. The National Forest is identified as a part of this offer. The Strategy highlights that the sector's priority is to make more consumers aware of Staffordshire as a destination for a short break, so encouraging greater volume of overnight stays, increased revenue and more employment in the industry. Developing conference tourism will be part of this. Burton-on-Trent is identified as a key centre for place led growth.

Within the **D2N2** Strategic Economic Plan tourism is recognised as a priority sector and a priority for 2033 is seen as presenting a world-class destination of choice for visitors and investors alike. The National Forest is identified as a key cultural / visitor economy asset in Southern Derbyshire but is **not** flagged as D2N2 wide visitor economy asset or opportunity. The plan identifies a need for capital investment in visitor attractions and for a sector specific development plan for the Visitor Economy.

The **D2N2 Visitor Economy** Review and investment Study (May 2014) identifies a number of priorities including improving access, securing accommodation development, supporting the development of anchor attractions, examining the potential for a dedicated conference centre, destinations and hubs (including development plans, hubs and sustainability for cultural and heritage facilities), retail (supporting markets and independents), food and drink (supporting pubs and micro-breweries). The National Forest is not identified as a destination / hub.

The **Greater Birmingham and Solihull LEP** covers Lichfield (also covered by the Stoke and Staffordshire LEP). Their Strategic Economic Plan focuses on four growth pillars and three themes (business, people and place). It identifies the need for a Greater Birmingham brand. The visitor economy is not a priority growth sector.

LEP Priorities can be summarised as follows:

Leicestershire and Leicester LEP	Stoke and Staffs LEP	D2N2 LEP	Greater Birmingham and Solihull LEP
Increasing productivity and private sector job growth	Core City – growth of Stoke	Business Support and access to funding	Growing Business
Creating a balanced and sustainable knowledge economy	Connected County	Innovation	Enhancing the regional economic hub
Addressing the physical requirements for success	Competitive Urban centres	Employment and Skills	UK Central, the enterprise belt and wider Birmingham area
Raising skills levels and educational attainment	Sector growth	Infrastructure for Economic Growth	Enhancing Growth Sectors – supporting delivery of key sites, infrastructure, skills and innovation

Provide effective business support	Skilled workforce	Housing and regeneration	
Stimulating investment and international trade			
Growing the green economy and investing in our communities.			

Locally

The National Forest falls within the boundaries of nine Local Authorities (3 counties and six districts). A summary of their economic and tourism policies is provided in the following table.

Local Authority	Policies	Key points
Charnwood		Economic strategy is focused on Loughborough Town Centre. There is no specific Tourism Policy.
Derbyshire County		Promotion is delivered by Visit Peak District and Derbyshire DMO. There is no county wide tourism/visitor economy strategy.
East Staffordshire	ES Regeneration and Growth Plan (2012-15)	While there is no specific tourism policy, East Staffs in 2010 did look at the strategic development of tourism. This identified 4 core themes: enhancing existing facilities/attractions, encouraging sustainable development to create a more competitive destination, improving the image of the Borough, and supporting tourism businesses through effective business support and training. They identified 3 key projects: • Maximising the impact of the waterways – the Trent and Mersey Canal, the River Trent and Washlands. A package of activities – many of which link to the National Forest. • Festival and events • Leasowes Farm Extraction Pits Development(Uttoxeter)
Hinckley and Bosworth	Economic Regeneration Strategy (2009-14)	The strategy identifies 6 priorities. Priority outlines a series of measures to promote Hinckley and Bosworth as a place to invest and visit. Hinckley & Bosworth has a Tourism Partnership which is a working group of tourism business Hinckley & Bosworth Borough Council and Leicestershire Promotions.
Leicestershire County		Tourism is externally contracted and currently delivered by Leicestershire Promotions. There is no specific Tourism Strategy.
Lichfield	Tamworth and Lichfield Economic Strategy (2011)	Developed by The Business and Economic Partnership (BEP). Theme 2 is concerned with place promotion – largely in investment terms but also tourism. The National Forest is not highlighted as a strength or opportunity.
North West	None found	

Leicestershire		
South Derbyshire	South Derbyshire Economic Development Statement 2013	The Economic Statement identifies 9 ambitions. A number of these are relevant to tourism development – e.g.: • Ambition 3 – developing tourism and the woodland economy, maximising the potential of The National Forest to address rural issues • Ambition 7 - Continuing the revival of Swadlincote town centre as a service centre and focus for the community and visitors
Staffordshire	Tourism Strategy 2012-14	The policy context for tourism in Staffordshire is provided by the Staffordshire County Council Tourism Strategy, 2012-2014. Priority activities include • Improving the quality and impact of the attract marketing and brand awareness campaigns, • Working with the inward investment teams to target the hotel sector • Understanding and capitalising on the nature of the overlap between Staffordshire's tourism economy and those of the Peak District and others.

National Forest Policy

The **National Forest Strategy (2014-24**) identifies the progress since 1991 – the visitor economy has grown and woodland coverage has increased from 6% to nearly 20%. The priorities for The National Forest to 2024 include:

- being a national exemplar, centre of excellence and research partner;
- continued creation of the forest but with an emphasis on how and why (rather than how much – i.e. quality over quantity);
- a systematic approach to all aspects of forest management (including non-woodland habitats and visitor attractions) to ensure value (of all kind) is maximised;
- a great experience on the ground – including improving the customer journey through effective marketing and information, maintaining the quality of existing infrastructure, new investment, and connecting up facilities, experiences and information;
- building the brand, and making it more entrepreneurial; and
- 'The Forest for everyone' – an inclusive, accessible and welcoming place for everyone.

Specific objectives to 2019 are:

- forest cover is increasing and, at the same time, forest sites are well-managed for tree health, climate change, people, beauty and biodiversity;
- the woodland economy grows in line with the maturing forest and sustains good management;
- an emerging visitor destination is promoted and nationally recognised;
- The National Forest brand is adopted widely;

- people from all backgrounds enjoy the Forest more readily and experience it as a place for their health and wellbeing; and
- it matures as a national exemplar, a centre of excellence and a test bed for research.

The **2014 National Forest Annual Report** highlights a number of Visitor Economy related targets:

- 10m visitor days by 2024, a 25% increase on 2012; and
- Full-time equivalent jobs in visitor economy, leisure and recreation, reaching circa 8,000 by 2025, an increase from the current circa 5,800.

The **previous National Forest Strategy (2004-14)** identifies six principal landscape zones, namely:

1. Needwood and South Derbyshire Claylands;
2. Trent Valley Washlands;
3. Mease and Scence Lowlands;
4. Leicestershire and South Derbyshire Coalfields;
5. Melbourne Parklands; and
6. Charnwood.

The highest concentration of pre-Forest woodland lies in areas 1, 5 and 6. Core principles of this strategy (in tourism terms are) sustainable tourism, National Forest Brand, quality assurance, accessibility, and partnership working.

Potential gateways include: Conkers, Rosliston, National Memorial Arboretum, Snibston Discovery Park, Calke Abbey, Foremark, Staunton Harold and Thornton Reservoir Visitor Centres, Bradgate Park Visitor Centre, Coors Visitor Centre, Barton Marina, Byrkley Park Garden Centre, and Bosworth Battlefield. Seven potential clusters are identified:

- Heart of the Forest;
- Melbourne Parklands and Reservoir;
- Mease Farms and Woods;
- Trent Valley Water Park;
- Snibston-Thornton Forest Parks;
- Charnwood Forest; and
- Needwood Forest.

Conclusions

Nationally the emphasis is on collaborative marketing (predicated on an attract and disperse model), creating compelling destinations and facilitate greater engagement between the visitor and experience through modern information provision, welcome at 'gateways', improved transport provision and access for disabled people.

LEP strategic themes and interventions tend to be crosscutting (for example, Business Growth Fund, sector skills development, innovation, etc), with some emphasis on place development (the principal city or cities and some key towns in their respective areas) and key economic sectors.

Stoke and Staffordshire and D2N2 LEPs both recognise tourism as a key sector - less so in Leicestershire and Leicester and the Birmingham and Solihull LEPs. The National Forest is also generally identified by the LEPs as a potential asset in terms of culture and visitor economy but not necessarily as a core one or as an area for place based economic development.

At a **LEP and Local Authority** level, there are few specific visitor economy or tourism strategies/ policies - specific examples include the D2N2 LEP, and Staffordshire (albeit at the end of its time framework). South Derbyshire, within their economic development strategy, highlight the potential of The National Forest to maximise tourism and the woodland economy to address rural related issues. However, aside from this, the economic development framework does not generally explicitly support The National Forest as an economic or tourism development opportunity.

The National Forest is concerned with the delivery of economic, environmental and social benefits. Access for all, health and wellbeing are key objectives. Within tourism importance of developing the experience, brand and information provision are priorities in the current National Forest Strategy.

In tourism terms, previous strategies have, not surprisingly, focused on similar elements and themes – for example, sustainability, quality, access, strengthening existing attractions, accommodation development and generating overnight stays, strengthening The National Forest brand, food and drink, events development and improving marketing communication etc. To an extent, previous work has adopted a supply / led approach rather than market led, with market segments typically broadly defined by visitor group and lifestage.

Appendix E – Consultees

The following is a list of the stakeholders who have taken part to date. Further consultations will take place in the second stage.

Workshop 1:

Mike Roylance – Economic Development Manager, South Derbyshire District Council

Goff Lewis – Cultural Services Team Manager, North West Leicestershire District Council

Frank Horsley – Head of Economic Regeneration, Derbyshire County Council

Workshop 2:

Sharon Earp – Owner, Dandelion Hideaway

Anne Bourne – Tourism Co-ordinator, Ashby Tourist Information Centre, North West Leicestershire District Council

Gail Archer – Tourism Information Centre Manager, Swadlincote, North West Leicestershire District Council

Neil Frazer – Land Agent, Savills

TBC, Twycross Zoo

Telephone conferences:

Julie Harrington, Managing Director - St George's Park

Paul Costiff, Head of Built Environment - East Staffordshire Borough Council

Sarah Oakden, Head of Marketing - The National Memorial Aboretum

Debbie Chesterman, Owner - Rosliston Forestry Centre

Steve Holdsworth - Community Woodland Manager, Forestry Commission - Central Forest District

Robin Neilson, Estate Office - Catton Hall

Guy Corbett-Marshall, Chief Executive - Staffordshire Wildlife Trust

Chas Bishop, Chief Executive, Space Centre

Mike Ballantyne, Project Director, The Heart of The National Forest CharitableTrust

Peter Tyldsley, Land Agent, Bradgate Park Trust

Christina Joachim, People Engagement Officer, The Woodland Trust

Graeme Whitehead, Group Manager, Tourism & Marketing, Staffordshire DMP

Jo Dilley, Acting Director, Visit Peak District

Jennifer Spencer, Chief Executive, Experience Nottinghamshire

Lesley Law on behalf of the National trust, Calke Abbey

Jane Kirkland - Seal Brook Farm Cottages, Grangewood

Alastair Chapman - Beehive Woodland Lakes, Rosliston

Cheryl Alldritt - Spinney View Barn/Park View Barn, Botany Bay

Jason Darkes - Premier Inn Head Office

Janice Pearson - Hill Farm Camping & Caravan Site, Packington

Carol Mallen - Lakeview Lodges, Shortheath

Isabel Stanley - Ingles Hill Caravan Park, Ashby de la Zouch

Maxine Brown - Blithfield Lakeside Barns

Accommodation Business Visits:

Graham Hughes - Whitemoor Lakes Centre

Tom Hartley - Tom Hartley Park Homes

Richard Robinson - YHA National Forest

Josh Fitzsimmons - Mercia Marina

Louisa Herrero - Wychnor Park Country Club

Appendix F – Current vision for tourism in The National Forest

The following is the vision for tourism in The National Forest as set out in the 2009 Vision and Action Plan for Sustainable Tourism in The National Forest[16].

A Vision for tourism in TNF

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

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

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

[16] Vision & Action Plan for Sustainable Tourism in The National Forest, The Tourism Company, 2009

Appendix G - Accommodation audit

Current visitor accommodation supply

The Scope of Our Review

Our starting point for assessing the current visitor accommodation supply of the National Forest was to review the 2014 visitor accommodation supply audit undertaken by GTS to populate the STEAM Model for The National Forest. We crosschecked this audit against key online booking accommodation sites (booking.com, LateRooms, Tripadvisor, Homeway, Holiday Lettings, Owners Direct, UK Campsite, Pitchup, Love Camping, Go Glamping and Canopy and Stars) and holiday cottage letting agency websites and undertook other internet searches to identify visitor accommodation operations in the area. This work identified a few additional visitor accommodation operations in The National Forest that GTS had not picked up, most notably Whitemoor Lakes Centre and Wychnor Park Country Club, and showed some errors in the GTS audit, most significantly the inclusion of the Donington Park Farmhouse Caravan Site and the omission of the owned holiday lodges at Swainswood Park.

We have reviewed the websites of most of the accommodation businesses currently operating in The National Forest and looked at customer reviews for them on Tripadvisor to get a feel for the quality of visitor accommodation that is currently available in The National Forest.

We have reviewed the visitor accommodation supply information and assessment contained in The National Forest Accommodation Needs Assessment undertaken by The Tourism Business in 2008, the Vision and Action Plan for Sustainable Tourism in the National Forest produced by the Tourism Company in 2009 and The National Forest Accommodation Analysis completed by Penny Wilkinson in 2010.

Total visitor accommodation supply in The National Forest

On the basis of our visitor accommodation audit we have identified 128 visitor accommodation businesses that are currently operating in The National Forest area, with a total of 5,542 letting bedspaces. The greatest bedspace capacity is in hotel accommodation and caravanning and camping provision. Self-catering accommodation accounts for just under 13% of the total stock, while group and youth accommodation, health spas and other types of serviced accommodation (inns, restaurants with rooms, guest houses and B&Bs) each account for around 7% of supply.

Table 1 – The National Forest Visitor accommodation supply – January 2015

Type of Accommodation	Total Establishments	%	Total Bedspaces	%
Hotels	23	18.0	2058	37.1
Inns	11	8.6	114	2.0
Restaurants with Rooms	1	0.8	9	0.2
Guest Houses/ B&Bs	32	25.0	254	4.6
Self-Catering	38	29.6	713	12.9
Caravan & Camping Sites	19	14.8	1658	29.9
Glamping Sites	0	0	0	0
Group & Youth Accommodation	2	1.6	370	6.7
Health Spas	2	1.6	366	6.6
Total	**128**	**100**	**5542**	**100**

The National Forest area's visitor accommodation supply comprises the following:

- two destination health spas - Champneys Springs and Hoar Cross Hall;
- two significant hotels at St George's Park (a Hilton and a Hampton by Hilton), which primarily cater for business from the National Football Centre and sport-related conferences;
- a number of budget hotels in town, business park and roadside locations;
- a range of independent 3 star and ungraded hotels in the towns;
- only one small country house hotel - Dovecliff Hall Hotel at Burton-upon-Trent;
- a range of guesthouses, B&Bs and farmhouse B&Bs across the area;
- a small number of inns;
- three holiday lodge parks with holiday lodges available for outright or timeshare ownership and rental - Swainswood Park and Ashby Woulds Luxury Lodges at Overseal, operated by Tom Hartley Park Homes, and the Wychnor Park Country Club timeshare resort operated by Diamond Resorts;
- a choice of self-catering holiday accommodation, including holiday lodges, self-catering barn conversions and residential properties let out for holidays and other short stay purposes;
- The National Forest YHA hostel at Moira;
- the Whitemoor Lakes Centre residential group activities centre run by Action Centres UK;
- the Conkers Camping and Caravanning Club site at Moira;
- a number of small touring caravan and camping sites and certificated sites across The National Forest area;
- two touring caravan and camping sites that offer a small number of camping pods; and
- no glamping provision currently.

Analysis by location

Tables 2 and 3 provide an analysis of The National Forest's current visitor accommodation supply by county in terms of numbers of establishments and bedspace capacity for each category of accommodation. The most significant bedspace supply is in the Staffordshire parts of The National Forest area, particularly in terms of hotel provision, with the two large hotels at St George's Park and 11 hotels in and around Burton-upon-Trent and group and youth accommodation, with the Whitemoor Lakes Centre.

The next most significant bedspace supply is in the Leicestershire parts of the National Forest area, especially in terms of touring caravanning and camping provision, with the largest site (Conkers Camping and Caravanning Club Site at Moira) here.

The smallest proportion of The National Forest's visitor accommodation supply are in Derbyshire, although this part of the area accounts for the most bedspaces in inns and self-catering accommodation, primarily as a result of the Swainswood Park and Ashby Woulds holiday lodge parks at Overseal. The Derbyshire section of the Forest has very little hotel accommodation, however, and there is no hotel currently serving Swadlincote. This part of

The National Forest has no group and youth accommodation and the area's two health spas are in the Leicestershire and Staffordshire parts of the Forest area.

There is very little visitor accommodation currently in Charnwood Forest or Needwood Forest, other than the two hotels at St George's Park and the Hoar Cross Hall health spa.

The area's hotels are predominantly located in relatively unattractive town, business park or roadside locations.

Table 2: The National Forest visitor accommodation supply, January 2015 – Analysis by county - establishments

County	Hotels		Inns/RWRs		Guest Houses/B&Bs		Self-Catering		Caravan & Camp Sites		Group & Youth Accom		Health Spas		TOTAL	
	Estabs	%	Estabs	%	Estabs	%	Estabs	%	Estabs	%	Estabs	%	Estabs	%	Estabs	%
Derbyshire	2	8.7	8	66.6	13	40.6	20	52.6	7	36.8					50	39.1
Leicestershire	8	34.8	2	16.7	10	31.3	11	29.0	8	42.2	1	50.0	1	50.0	41	32.0
Staffordshire	13	56.5	2	16.7	9	28.1	7	18.4	4	21.0	1	50.0	1	50.0	37	28.9
Total	**23**	**100.0**	**12**	**100.0**	**32**	**100.0**	**38**	**100.0**	**19**	**100.0**	**2**	**100.0**	**2**	**100.0**	**128**	**100.0**

Table 3: The National Forest visitor accommodation supply – January 2015, Analysis by County - Bedspaces

District/County	Hotels		Inns/RWRs		Guest Houses/B&Bs		Self-Catering		Caravan & Camp Sites		Group & Youth Accom		Health Spas		TOTAL	
	Beds	%	Beds	%	Beds	%	Beds	%	Beds	%	Beds	%	Beds	%	Beds	%
Derbyshire	46	2.2	80	65.0	98	38.6	379	53.2	490	29.6					1093	19.7
Leicestershire	522	25.4	24	19.5	92	36.2	106	14.9	928	55.9	85	23.0	186	50.8	1943	35.1
Staffordshire	1490	72.4	19	15.5	64	25.2	228	31.9	240	14.5	285	77.0	180	49.2	2506	45.2
Total	**2058**	**100.0**	**123**	**100.0**	**254**	**100.0**	**713**	**100.0**	**1658**	**100.0**	**370**	**100.0**	**366**	**100.0**	**5542**	**100.0**

Analysis by Standard

Tables 4 and 5 provide an analysis of The National Forest's visitor accommodation supply by standard. This analysis does not rely solely on the National Quality Assurance Scheme. For hotels we have also used the gradings used by the key online booking agents booking.com and Tripadvisor. We have also used our professional judgment to identify luxury and boutique establishments, for which there are no national standards. While we have clearly not been able to visit all accommodation establishments that are currently trading in The National Forest area we have reviewed their websites to give us an insight into the quality of accommodation that they are marketing. On the basis of these assessments, we make the following observations on the quality of current visitor accommodation provision in The National Forest:

- very few accommodation businesses are graded under the National Quality Assurance Scheme. Increasing numbers of accommodation operators across the country are opting out of the Scheme either due to the cost or because they feel that it is no longer relevant at a time when customers are increasingly booking through online travel agents that use their own grading systems or allow self-rating, or take much more notice of customer reviews and ratings on Tripadvisor. This also appears to be happening in The National Forest;

- hotels in The National Forest area appear to be fit-for-purpose but largely offering a functional standard of accommodation. The Hilton at St George's Park is the area's only 4 star hotel. There is only one small country house hotel and no boutique hotel provision. Independent 3 star hotels appear to offer fairly dated accommodation. Ungraded hotels seem to offer a fairly basic standard of accommodation and appear to be catering largely for the contractor market;

- the supply of inns, guest houses and B&Bs is also variable in terms of quality. There are some good quality 4 star establishments and one 5 star B&B. Other establishments seem to offer a relatively low standard of somewhat dated accommodation. High quality inns and B&Bs are as follows:

  - the Staff of Life, Ticknall - offers 2 superior bedrooms alongside 5 standard bedrooms;

  - the 3 Horseshoes, Barton-under-Needwood - a gastropub with 3 contemporary bedrooms;

  - Curtain Cottage, Woodhouse Eaves - a boutique B&B with 2 bedrooms, featured in Alastair Sawday's Special Places to Stay; and

    Horseshoe Cottage Farm at Cropston - a recently restored 5 star Gold farmhouse B&B marketing through Wolsey Lodges;

- the quality of The National Forest's self-catering supply is similarly variable. The majority of self-catering establishments are ungraded, some of which appear to offer a fairly basic standard of accommodation. There are, however, some good quality 4 star properties and a few 5 star and boutique establishments, for example:

  - Deerpark Lodge, Staunton Harold Estate - a contemporary holiday lodge that has been built on the Staunton Harold Estate;

   - Southwood House Farm, Ticknall - a National Trust holiday cottage on the Calke Abbey Estate;
   - Upper Rectory Farm Cottages, Appleby Magna - a barn conversion complex of 9 4 and 4 star Gold holiday cottages; and
   - Ashby Woulds Luxury Lodges - Tom Hartley's new 5 star boutique holiday lodge park which has 20 luxury lodges with hot tubs for sale and rental;
- touring caravan and camping sites similarly appear to vary in quality;
- the YHA National Forest hostel offers a modern, contemporary standard of hostel accommodation. The Whitemoor Lakes Centre offers a good standard of accommodation for the group and youth market; and
- the two health spas both offer luxury accommodation.

Table 4: The National Forest visitor accommodation supply – January 2015, analysis by standard/grade - establishments

District/County	Hotels		Inns/RWRs		Guest Houses/B&Bs		Self-Catering		Caravan & Camp Sites		Group & Youth Accom		Health Spas		TOTAL	
	Estabs	%	Estabs	%	Estabs	%	Estabs	%	Estabs	%	Estabs	%	Estabs	%	Estabs	%
Luxury													2	100.0	2	1.6
Boutique							2	5.3							2	1.6
5 star					1	3.1	2	5.3							3	2.3
4 star	1	4.3	3	25.0	13	37.5	6	15.8	1	5.3	1	50.0			24	18.7
3 star	5	21.8			2	6.3	3	7.9	1	5.3					11	8.6
2 star					1	3.1									1	0.8
Branded Budget Hotel	9	39.1													9	7.0
Ungraded	8	34.8	10	75.0	15	50.0	25	65.7	17	89.4					75	58.6
No national grading											1	50.0			1	0.8
Total	**23**	**100.0**	**13**	**100.0**	**32**	**100.0**	**38**	**100.0**	**19**	**100.0**	**2**	**100.0**	**2**	**100.0**	**128**	**100.0**

Table 5: The National Forest visitor accommodation supply – January 2015, analysis by standard/grade - bedspaces

District/County	Hotels		Inns/RWRs		Guest Houses/B&Bs		Self-Catering		Caravan & Camp Sites		Group & Youth Accom		Health Spas		TOTAL	
	Beds	%	Beds	%	Beds	%	Beds	%	Beds	%	Beds	%	Beds	%	Beds	%
Luxury													366	100.0	366	6.6
Boutique							20	2.8							20	0.4
5 star					6	2.4	182	25.5							188	3.4
4 star	295	14.3	24	19.5	82	32.3	82	11.5	360	21.7	85	23.0			928	16.7
3 star	361	17.6			16	6.3	6	0.9	51	3.1					434	7.8
2 star					12	4.7									12	0.2
Branded Budget Hotel	1147	55.7													1147	20.7
Ungraded	255	12.4	99	80.5	138	54.3	423	59.3	1247	75.2					2162	39.0
No national grading											285	77.0			285	5.2
Total	**2058**	**100.0**	**123**	**100.0**	**254**	**100.0**	**713**	**100.0**	**1658**	**100.0**	**370**	**100.0**	**366**	**100.0**	**5542**	**100.0**

Analysis by Size

Tables 6 to 10 provide an analysis of the current supply of different types of visitor accommodation in The National Forest by size. They show that the majority of visitor accommodation businesses are small in scale. Key observations regarding the size of visitor accommodation businesses are as follows:

- other than the Hilton at St George's Park and some of the area's budget hotels, The National Forest hotel supply comprises largely relatively small hotels: over two thirds of the area's hotels have fewer than 40 bedrooms;
- The Hilton at St George's Park is the only hotel with more than 100 bedrooms;
- Inns in The National Forest range from 2 to 8 bedrooms;
- 59% of guest houses and B&Bs have 1-3 letting bedrooms. The National Forest area has some larger guest houses and B&Bs in Ashby-de-la-Zouch, Burton-upon-Trent and Coalville;
- 79% of self-catering establishments have only one or two units;
- there are only 3 holiday cottage complexes in The National Forest with 5 or more letting units. None of them have leisure facilities, such as swimming pools and games rooms;
- The National Forest has 3 holiday lodge parks with 20-48 lodges for outright or timeshare ownership or rental;
- the majority of self-catering units have 1,2 or 3 bedrooms;
- there are only 4 large self-catering properties (super cottages) across The National Forest that can sleep 10 or more guests:
  - House-on-the-Hill, Woodhouse Eaves (15 bedspaces);
  - The Poplars, Newborough Cottages (14 bedspaces);
  - Piano Barn, Newborough Cottages (14 bedspaces); and
  - Southwood House Farm, Ticknall (14 bedspaces);
- three holiday cottages at Upper Rectory Farm Cottages, Appleby Magna can connect to provide one large cottage sleeping 22; and
- 84% of touring caravan and camping sites have under 40 pitches and just under 53% have 10 or fewer pitches.

Table 6: The National Forest hotel supply – January 2015 – by size		
Number of Bedrooms	**Hotels**	**%**
1-10	2	8.7
11-20	5	21.7
21-30	5	21.7
31-40	4	17.4
41-50	0	0
51-100	6	26.1
101-150	1	4.4
TOTAL	**23**	**100**

Table 7: The National Forest Inns supply – January 2015 – by size		
Number of Bedrooms	**Inns**	**%**
2	2	18.2
3	1	9.1
4	2	18.2
6	2	18.2
7	3	27.2
8	1	9.1
Total	**11**	**100**

Table 8: The National Forest Guest House/ B & B supply – January 2015 – by size		
Number of Bedrooms	**Guest Houses/ B&Bs**	**%**
1	2	6.2
2	7	21.9
3	10	31.3
4	3	9.4
5	3	9.4
6	3	9.4
7	2	6.2
8	1	3.1
10+	1	3.1
Total	**32**	**100**

Table 9: The National Forest self-catering supply – January 2015 by size of operational (number of letting units)		
Number of Letting Units	**Estabs**	**%**
1	23	60.5
2	7	18.4
3	2	5.3
5-9	3	7.9
20+	3	7.9
Total	**38**	**100**

Table 10: The National Forest supply of touring caravan and camping sites – January 2015 by size (number of pitches)		
Number of Pitches	**Sites**	**%**
5/6	7	36.8
10	3	15.8
11-25	4	21.1
30-40	2	10.5
50-100	3	15.8
Total	**19**	**100**

Accessible accommodation

Our audit of visitor accommodation in The National Forest has not included a full review of the provision of accessible visitor accommodation across the area. The new Hilton and Hampton by Hilton hotels at St George's Park provide a number of accessible bedrooms, as do the area's budget hotels. The provision of accessible bedrooms at other hotels, inns, guest houses and B&Bs is likely to be patchier. Some of the holiday cottages and holiday lodges in The National Forest may provide units that have been adapted for people with mobility difficulties. Rosliston Forest Lodges stands out as a fully accessible self-catering business. All six of its lodges are designed to be wheelchair accessible, with level access, kitchen. The YHA National Forest hostel has three accessible bedrooms and Whitemoor Lakes Centre has accommodation that is adapted for a range of disabilities and special needs.

Visitor accommodation just beyond The National Forest

There are a significant number of hotels just on the edge of The National Forest at the East Midlands Airport, Castle Donington, Kegworth, Loughborough, the north western fringe of Leicester, Newton Solney, Willington, Appleby Magna, Market Bosworth, Fradley and Tutbury. Further afield there are also concentrations of hotels in Leicester, Derby, Lichfield, Hinckley and Uttoxeter that are not far from The National Forest.

Table 11: Hotels on the edge of The National Forest			
Hotel	**Location**	**Grading**	**Bedrooms**
East Midlands Airport/Castle Donington/Kegworth			
Radisson Blu East Midlands Airport	Castle Donington	4 Star	218
Thistle East Midlands Airport	Castle Donington	4 Star	164
Hilton East Midlands Airport	Kegworth	4 Star	152
Best Western Premier Yew Lodge	Kegworth	4 Star	103
The Priest House On The River	Castle Donington	4 Star	42
Donington Park Farmhouse	Castle Donington	3 Star	19
Donington Manor	Castle Donington	3 Star	33
Kegworth Hotel	Kegworth	3 Star	79
Holiday Inn Express East Midlands Airport	Castle Donington	Budget	90
Premier Inn East Midlands Airport	Castle Donington	Budget	80

Table 11: Hotels on the edge of The National Forest			
Hotel	**Location**	**Grading**	**Bedrooms**
Travelodge Nottingham EM Airport	Castle Donington	Budget	78
Loughborough			
Burleigh Court	Loughborough	4 Star	225
Ramada Loughborough	Loughborough	3 Star	78
The Link Hotel	Loughborough	3 Star	94
The Cedars	Loughborough	3 Star	36
Premier Inn Loughborough	Loughborough	Budget	112
Travelodge Loughborough Central	Loughborough	Budget	87
Mountsorrel/Quorn/Rothley/A6 Corridor			
Quorn Country Hotel	Quorn	4 Star	36
Quorn Grange	Quorn	3 Star	38
Rothley Court	Rothley	3 Star	36
Leicester Fringe/ A46 Corridor			
The Castle Hotel	Kirby Muxloe	3 Star	22
Ibis Budget Leicester	Birstall	Budget	73
Newton Solney			
Mercure Burton Upon Trent	Newton Solney	4 Star	50
Willington			
Ibis Budget Derby	Willington	Budget	81
Appleby Magna			
Best Western Appleby Park	Appleby Magna	3 Star	95
The Appleby Inn	Appleby Magna	3 Star	25
Market Bosworth			
Bosworth Hall	Market Bosworth	4 Star	192
Fradley			
Premier Inn Lichfield North A38	Fradley	Budget	30
Tutbury			
Dog & Partridge	Tutbury	3 Star	9

In terms of other types of visitor accommodation, the following establishments are worthy of note just beyond the boundary of The National Forest:

- Kingfisher Holiday Park at Fradley Junction, near Alrewas - a 5 star holiday park with 93 owned static caravan holiday homes and 6 for hire;

- Proctors Pleasure Park at Barrow-on-Soar - a holiday park with 70 owned static caravan holiday homes and a small number of pitches for touring caravans and tents and seasonal tourer use;
- Mercia Marina at Willington - which has 16 owned holiday lodges. The marina, which opened in 2008, started with an initial phase of 6 lodges in 2009, which it has gradually added to as lodges have been sold. A further 2 lodges are in the pipeline, to be followed by a further phase of 8. The marina operator provides a lodge rental service for lodge owners if they want to use it;
- Blithfield Lakeside Barns - a complex of 6 self-catering barns on the edge of Blithfield Reservoir; and
- Dandelion Hideaway at Osbaston - one of only two glamping sites in Leicestershire, offering 6 canvas cottages.

There are also a number of sizeable touring caravan and camping sites immediately surrounding The National Forest, a number linked to inland marinas and water sports lakes:

- Donington Park Farmhouse Camp Site - 60 pitches;
- Kingsmills Camping and Caravan Park - 60 pitches;
- Meadow Farm Marina and Caravan Park - 50 pitches;
- Shardlow Marina and Caravan Park - 60 pitches; and
- Bosworth Water Trust Leisure Park - 77 pitches.

Changes in The National Forest visitor accommodation supply

Our research has identified the following changes to the visitor accommodation supply in The National Forest since 2008:

Hotels

- the 4 star Hilton hotel (142 bedrooms) and Hampton-by-Hilton budget hotel (86 bedrooms) opened at St George's Park in 2012. The hotels are also supported by 19 meeting rooms and a health club and spa;
- the Premier Inn Burton-on-Trent Central opened in 2011, with 64 bedrooms; and
- the Travelodge Burton-upon-Trent Central opened in 2012, with 68 bedrooms.

Inns

Three inns have ceased trading or stopped offering accommodation:

- The Melbourne Arms, Melbourne;
- The Brant Inn, Groby;
- New Inn, Needwood.

Guest houses and B&Bs

A number of guest houses and B&Bs have ceased trading, including:

- Derby House B&B, Ticknall;
- Keepers Cottage, Walton-on-Trent;
- Station Farmhouse, Melbourne.
- Overseale House at Overseal is currently closed for renovations.
- A few new B&Bs have opened, including The Old Band Room B&B, which opened in 2013.

This is typical of the churn in this sector of the accommodation market.

Self-catering

There appears to have been a gradual increase in the supply of holiday cottages, log cabins and holiday lodges, for example:

- Rosliston Forestry Centre added two more lodges in 2008/9;
- Shortheath Water added a second holiday lodge in 2010;
- Spinney View Barn at Botany Bay opened in 2009, followed by Park View Barn in 2012;
- HillFarm Packington added two holiday log cabins in 2014.

Holiday Lodge Parks

- Tom Hartley opened Swainswood Park in 2008 (38 holiday lodges for ownership and rental) and Ashby Woulds Luxury Lodges (20 lodges for ownership and rental) in 2014, both at Overseal.

Touring caravan and camping sites

- The Conkers Camping and Caravanning Club site opened in 2008 (90 pitches);
- Springwood Fisheries in Melbourne has added 4 camping pods, including two new deluxe pods in 2014.

Group and youth accommodation

- The YHA National Forest opened in 2008 (with 85 bedspaces)
- Whitemoor Lakes Centre opened in 2011, with group accommodation for up to 285.

The role of The National Forest in stimulating visitor accommodation development

The National Forest clearly played a direct role in bringing forward the development of the YHA National Forest hostel and the Conkers Camping and Caravanning Club site. It has also been a key factor behind the development of the forest lodges at Rosliston Forestry Centre as well as many of the holiday cottage, holiday lodge and touring caravan and camp site operations that have opened across The National Forest area. It was also a factor behind the development of Tom Hartley's Swainswood Park and Ashby Woulds Luxury Lodges holiday lodge parks.

The National Forest has not, however, been a driver of hotel development. It was not a factor behind the development of the hotels at St George's Park, which were built to service demand from the National Football Centre. It is unlikely to have been a factor behind the development of the new Travelodge and Premier Inn budget hotels in Burton-upon-Trent. Neither was The National Forest a factor in the development of the Whitemoor Lakes Centre. It came about because the land owner wanted to gift his land and an endowment for a centre that would provide activity holiday opportunities for young people.

Current demand for visitor accommodation in the national forest

Hotels

Our research shows the following key findings regarding the current performance of hotels in The National Forest area:

- the hotels at St George's Park are trading at very high occupancies, typically over 80% for most of the year. They primarily cater for football teams coming to train at the National Football Centre, sport-related conferences and some local corporate demand. They have very limited availability for leisure breaks;
- budget hotels in The National Forest area are achieving very high occupancies, typically 77-80% in 2014. They frequently fill and turn business away during the week and on Friday and Saturday nights during the summer. In line with budget hotels generally, we would expect them to be catering for a mix of corporate business and contractor demand during the week and wedding parties and people visiting friends and relatives at the weekend. Leisure breaks are likely to be a minor market for them; and
- we have no information about the performance of the independent 3 star hotels in The National Forest area, other than that they are generally trading at relatively low room rates. Based on our knowledge of how similar hotels trade in other comparable destinations we would expect their occupancies to be relatively low (probably not much more than 60-65%) and would expect their key markets to be local business visitors, contractors, wedding parties and people visiting friends and relatives. They are not the sort of hotels that will attract strong leisure break business, other than price-driven business through online travel agents and daily deals sites.

Guest Houses and B&Bs

Our business survey provides the following insight into the current performance of guest houses and B&Bs in The National Forest:

- guest house and B&B occupancies vary significantly. The majority of guest house and B&B respondents to our survey reported an average annual room occupancy for 2014 of 61-70%. A few recorded an occupancy of over 70%, while some indicated lower occupancies of 51-60% and in one case 31-40%. Low occupancies do not necessarily indicate a lack of demand, however, as guest house and B&B operators may choose to limit the amount of business they take because of the lifestyle they wish to pursue;

- occupancies have generally increased strongly for guest houses and B&Bs in the last 3 years. Only one respondent reported a decrease;
- most guest houses and B&Bs are busy between April and October, both during the week and at weekends. Quieter periods for some are weekends between November and March and weekdays during these months for some;
- key markets are business visitors, short break customers, wedding parties, people visiting friends and relatives and contractors for some; and
- key attractors for leisure breaks are the ease of getting to the area and its accessibility to attractions, towns and cities and events and festivals in the surrounding area. Woodlands and family attractions in The National Forest are generally of less or no importance.

Self-Catering

On the basis of our research, the following are our key findings regarding the current performance of self-catering holiday cottages and holiday lodges in The National Forest:

- average annual self-catering occupancies vary significantly. They are generally, relatively low at around 50-60% for most holiday cottages and holiday lodge operations. Some establishments reported occupancies of 61-70% but none indicated an occupancy of over 70%.
- self-catering demand is seasonal and weekend-focused. Self-catering operators generally achieve high weekend occupancies between April and September and during the week in July and August but much lower occupancies in the winter, other than over the Christmas and New Year period, unless they can attract long stay demand from people working in the area or those requiring temporary accommodation between house moves or while work is being undertaken on their home;
- self-catering businesses in The National Forest are only consistently turning business away at weekends in the peak summer months;
- occupancies have generally remained static or reduced for self-catering properties over the last 3 years. Most operators attributed this to the increase in self-catering supply in the area. A minority of self-catering operators reported an increase in occupancy levels;
- key markets are short breaks, long holidays and people visiting friends and relatives. Wedding guests and overseas tourists are secondary markets;
- large units (super cottages) and self-catering complexes attract strong weekend demand for family and friend get togethers and celebrations;
- some self-catering operators are focusing more on business and contractor demand as they feel that the leisure break and holiday market has become too competitive as the supply of self-catering properties has increased; and

- as a fully accessible site, Rosliston Forest Lodges attracts good demand and substantial repeat business from the disabled holiday market. 20% of guests have some form of disability.

Holiday Lodge Parks

Our research provides the following evidence of demand for holiday lodge ownership in The National Forest area:

- while we have no information about holiday lodge sales at Swainswood Park it is not unreasonable to assume that most of its lodges have now been sold, as Tom Hartley opened a second holiday lodge park at Overseal in 2014 - Ashby Woulds Lodges;
- Mercia Marina has gradually increased its stock of holiday lodges as they have sold from an initial phase of 6 lodges in 2009 to 16 currently, with a further two lodges currently available for sale. A second phase of another 8 lodges is planned for 2015; and
- Wychnor Park Country Club achieves very high occupancies through the Diamond Resorts timeshare points system.

Touring caravan and camping sites

Our research provides the following insight into the current performance of touring caravan and camping sites in The National Forest:

- demand for touring caravan and camping sites is highly seasonal and weekend-focused. Most sites achieve good pitch occupancies at weekends between Easter and October and are generally fully booked and turning business away on Bank Holiday weekends and weekends in July and August. Midweek pitch occupancies are much lower during these months, typically running at around 40%, possibly higher in July and August. Winter occupancies are low for those sites that remain open all year. Average annual pitch occupancies range from 30% to 60%;
- the key market for touring caravan and camping sites in The National Forest is weekend breaks. Much of this demand comes from within a 30 mile radius;
- other markets are long holidays, overnight stops by touring caravanners and campers, people visiting friends and relatives, family get togethers, people attending weddings, and contractors working in the area;
- touring caravan and camping sites in The National Forest attract some demand from overseas caravanners, motor homers and campers, especially from the Netherlands and Germany; and
- one of the caravan sites that we spoke to attracts strong demand for seasonal tourer pitches - where touring caravan owners leave their caravan on a site for the season to use it when they want to.

Group and youth accommodation

Our research has provided the following information on the current performance of group and youth accommodation establishments in The National Forest:

- The YHA National Forest hostel is underperforming compared to other YHA hostels: its average annual bed occupancy was 11 percentage points below the national average for YHA hostels in 2014. Families are the key market at weekends, school and youth groups the main market during the week. Demand is seasonal. The hostel operates on a reduced opening pattern between November and February. Weekend demand from families is strong in the summer months and the hostel can be fully booked and turning people away on some weekends in the peak summer months. Conkers is a key draw for families. The hostel also attracts strong demand from groups of families going away for the weekend and for family get togethers and celebration weekends. The hostel generally has a school or youth group staying for 2-3 nights each week between March and October. It works closely with Conkers to cater for these groups. They stay at the hostel and undertake activities at Conkers during the day. Groups also use the Ashby Canal for kayaking and Carver's Rocks at Foremark for climbing. The hostel also attracts some demand from YHA members and overseas tourists stopping off for a night and from walking and cycling groups.
- Whitemoor Lakes Centre caters for school groups during the week in term time and sometimes also at weekends and youth, religious and specialist groups at weekends. The centre generally has a number of groups staying every weekend. It can cater for up to 7 groups at a time, although rarely has more than 5 groups staying at any one time. The centre generally trades at capacity with school groups between mid-May and mid-July and mid-September and mid-November and attracts strong demand for youth camps in the summer. Midweek occupancies are, however, very low in the winter.

Examples of visitor accommodation development elsewhere

We discuss below some of the key trends in rural tourist accommodation development that we think could have potential in The National Forest:

Holiday lodge parks

Holiday lodge parks offering timber holiday lodges for outright or timeshare purchase and/or rental are an accommodation offer that has rapidly developed across the UK over the past 20 years. They have developed primarily in inland locations, often woodland or waterside settings and/or associated with other developments and activities such as marinas, golf courses (golf lodges), fishing lakes (fishing lodges), watersports or alongside hotels. Most holiday lodge parks are small – the average holiday lodge park covers 32.2 acres and has 35 lodges - but some can be much larger in scale, up to at least 100-150 lodges. Timber holiday lodges are generally seen as a more up-market and exclusive alternative to the traditional caravan holiday home: they are particularly popular with older and more affluent customers. Most holiday lodges have two or three bedrooms. Holiday lodge parks increasingly have a number of on-site leisure facilities, including restaurants, bars, swimming pools, gyms and children's play areas. Holiday lodges are generally purchased as second homes for holiday purposes. Most park operators offer a holiday rental service to owners and many make participation in such a service a condition of purchasing a lodge. Lodge owners typically live within three hours of their holiday lodge and are aged over 50. The lodge rentals market attracts a younger clientele, with rental holidaymakers most typically aged 31-50. The recession resulted in a significant slowdown in UK holiday lodge sales, with the reduced consumer confidence and falling house prices resulting in far fewer buyers for such holiday properties. Some operators have changed their strategy to holiday letting as a result. With the economy now starting to recover there is renewed interest in holiday lodge ownership.

There are a growing number of holiday lodge letting agencies and websites. The leading one is Hoseasons (www.hoseasons.co.uk/lodges), which has also developed the sub-brands of Autograph Lodge Holidays (www.autographlodgeholidays.co.uk) and Evermore Lodge Holidays (www.evermorelodgeholidays.co.uk).

Others include Book Holiday Lodges (www.bookholidaylodge.co.uk) and its sister brand Lodges With Hot Tubs (www.lodgeswithhottubs.org.uk) and Just Lodges (www.justlodges.com).

Key holiday lodge park operators/developers in the UK are as follows:

- The Dream Lodge Group (www.thedreamlodgegroup.co.uk) – 6 sites in East Sussex, Essex, Norfolk, Cambridgeshire, Devon and Cornwall.
- Forest Holidays – part of the Forestry Commission (www.forestholidays.co.uk/choose-a-cabin) – offers Golden Oak Cabins at 9 sites in Scotland, Wales, the Forest of Dean, Gloucestershire, Hampshire, Norfolk and Nottinghamshire. Its most recent development has been a complex of 60 cabins in Blackwood Forest in Hampshire in 2013 and 63 cabins in Thorpe Forest in Norfolk in 2014. Planning permission granted for a development of 78 forest cabins in Delamere Forest in Cheshire was overturned in December 2014 following a public enquiry as the site lies in the Green Belt.
- Natural Retreats (www.naturalretreats.co.uk) has developed eco lodge parks in the Yorkshire Dales and North Scotland and luxury holiday home developments in Cornwall and North Wales. The company is currently progressing a scheme at Kilvington Lakes in Nottinghamshire to restore the former gypsum quarry to provide 34 holiday lodges; a central building providing 25 letting bedrooms, a cafe and gym, swimming pool and spa; a conference and education centre; 15 luxury camping pods; a watersports and activity building; lakes for watersports and swimming; networks of walking trails, boardwalks and cycle paths and a range of biodiversity features.
- Darinian Leisure Resorts (www.darinian.co.uk) has two holiday lodge parks in Essex and the Yorkshire Dales offering luxury, contemporary lodges for rental and ownership.
- Sheffield-based Coppergreen Developments has developed the Woodland Lakes Lodges holiday lodge park at Thirsk in North Yorkshire and is currently seeking planning permission for a holiday lodge park with 139 lodges on land adjacent to Clumber Park in Nottinghamshire.
- Tom Hartley Park Homes (www.tomhartleyparkhomes.co.uk), a park home operator with sites in the East Midlands and Home Counties opened the Swainswood Park holiday lodge park at Overseal in Derbyshire in 2008 and is currently developing Ashby Woulds Lodges (www.ashbywouldslodges.co.uk) in the same location as a boutique leisure park with a first phase of 20 luxury holiday lodges for holiday home ownership.
- Lancashire-based holiday park operator Pure Leisure Group (www.pureleisuregroup.com) operates the South Lakeland Leisure Village holiday lodge park and two golf lodge

developments in Cambridgeshire and East Yorkshire alongside 6 caravan holiday home parks in the Southern Lake District, Northamptonshire and East Anglia, some of which also offer holiday lodges for ownership or rental.

Examples of recent and current holiday lodge park developments include:

- Scampston Park Lodges, Malton, North Yorkshire (www.scampston.co.uk/park-lodges.html) – a development of 75 luxury holiday lodges for sale;
- Westholme Estate (www.westholme-estate.co.uk) – Darinian Leisure Resorts' £10 million development of a former caravan holiday home park;
- The Lakes by yoo, Cotswolds (www.thelakesbyyoo.com) – a development of luxury second homes around a series of lakes;
- The Sherwood Hideaway, Nottinghamshire (www.sherwoodhideaway.com).

Fishing lodge complexes

Fishing lodges complexes are clusters of timber lodges around fishing lakes for sale or rental. They can range in size from 2-3 lodges up to more extensive developments of 40-50 lodges. They vary in standard but are frequently high quality, luxury 4 and 5 star lodges. Examples include:

- Heron Lakes, East Yorkshire (www.heron-lakes.co.uk) – 50 lodges.
- Woodland Lakes Lodges, Thirsk (www.woodlandlakeslodges.co.uk) - 19 eco-friendly holiday lodges around a complex of 13 fishing lakes.

- Eye Kettleby Lakes, Leicestershire (www.eyekettlebylakes.com) - 12 luxury log cabins around a complex of fishing lakes, together with a 61-pitch 5 star touring caravan site.

Eco lodges and eco lodge parks

Eco lodges and eco lodge parks are a more recent product development. These are individual timber lodges or complexes of lodges that are built to the highest possible environmental sustainability standards and designed and operated to minimise their carbon footprint. Eco lodges will typically include features such as the use of sustainable materials in their construction, grass or sedum roofs, renewable energy sources, waste recycling, energy conservation measures and water conservation systems. Their green credentials are a key part of their marketing and many customers are increasingly choosing these types of accommodation because they want to go an eco-friendly holiday and reduce their carbon footprint. Eco lodge operators will usually also encourage their guests to take part in green activities in terms of car-free days out, walking and cycling, nature study, foraging, bird and wildlife watching, and buying local produce. Examples include:

- Natural Retreats' Yorkshire Dales eco lodge park development near Richmond (www.naturalretreats.co.uk/yorkshire-dales/self-catering-holidays.php)
- Brompton Lakes, Yorkshire (www.bromptonlakes.co.uk/log-cabins-yorkshire.asp)
- Mill Meadow Eco Homes, Somerset (www.millmeadow.co.uk)
- Rosehill Lodges, Cornwall (www.rosehilllodges.com)
- Wheatland Farm Eco Lodges, Devon (www.wheatlandfarm.co.uk)

Watersports Holiday Parks

Examples of holiday parks that have been successfully developed alongside watersports lakes are as follows:

- Tallington Lakes, near Stamford in Lincolnshire is a 205-acre site providing a series of lakes for water sports including water skiing, jet skiing, wakeboarding, dinghy sailing, canoeing and fishing. Other facilities include a dry ski slope, off-road karting, a climbing tower, an outdoor swimming pool, a children's adventure playground and a restaurant and bar. Mature trees surround the site. In terms of accommodation, the site offers a range of 2 and 3-bedroom lakeside mobile homes to buy or rent and a touring caravan and camping site with 83 pitches. The park is currently developing a number of new luxury 2 and 3 bedroom lakeside lodges for sale and rental.

- Away Resorts' Tattershall Lakes Country Park is a 350-acre site set in woods located at Tattershall in Lincolnshire. The site has a 60-acre lake for water skiing and wake boarding and 4 fishing lakes. Other facilities include an 18-hole golf course, and indoor swimming pool, gym and spa, and a restaurant and bar. The park has around 200 privately owned static caravans, park homes and Swiss style log cabins and a small number of log cabins for rental. The park is gradually shifting over to park homes and log cabins as the demand for these types of unit increases and demand for static caravans reduces. More recently the site has added a canvas village of luxury bell tents.

- 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, which around 40 owners are currently using. Other owners let out their homes themselves or through letting agencies such as Orion Holidays (which specialises in letting properties at The Watermark) and

some of the national self-catering 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. There are a number of other accommodation businesses at the Cotswold Water Park, which includes 140 lakes created as a result of sand and gravel extraction. These include the recently developed Waters Edge, Lake Pochard and Lakes by yoo holiday lodge developments; the Hoburne Cotswold holiday park, with holiday lodges, chalets, static caravans and touring caravan and camping pitches; and the 4 star Cotswold Water Park Four Pillars Hotel which opened in August 2007 with 234 bedrooms, a leisure club and spa, extensive conference facilities and 27 lakeside apartments.

Touring caravan and camping sites

The focus of product development in the UK touring caravan and camping sector has been primarily on the upgrading and development of existing sites and the extension of opening periods, rather than on new site development. Where new sites have been developed, they have generally been relatively small sites. Planning constraints impose a significant barrier on the development of large, new touring caravan and camping sites in many parts of the UK, particularly for schemes that involve new buildings and/or winter caravan storage. Achieving commercially viable large touring caravan and camping site development projects is also very difficult. The Caravan Club and Camping and Caravanning Club are the main operators that have opened large new sites. They are motivated more by providing additional choice for their members than entirely commercial considerations. The Camping and Caravanning Club is continually looking for opportunities for new club sites. Sites associated with visitor attractions and leisure and sports facilities are of particular interest, for example the Club's site at the Gulliver’s Kingdom theme park in Milton Keynes. The Caravan Club has acquired established touring parks in a number of locations and upgraded and developed them into new club sites. These have included sites in West Sussex, Cheshire, Lincolnshire and Scotland. It also opened entirely new club sites in Barnard Castle in County Durham in 2010, Bridlington in East Yorkshire in 2011, Strathclyde Country Park near Glasgow in 2012 and Stonehaven in Aberdeenshire in 2013. The development of Caravan Club sites is carried out using local suppliers and contractors where possible, and with an emphasis on landscaping using native species to promote biodiversity. The Club has developed an expertise in land reclamation, with a number of new sites having been developed on brownfield sites such as worked-out quarries, former railway stations and ex-service camps.

Both the Caravan Club and the Camping and Caravanning Club are investing substantially in improving their sites. The Caravan Club typically invests in excess of £10million annually in site improvement and development, while the Camping and Caravanning Club embarked on a 5-year, £29 million investment programme in 2009 to position its site network amongst the best in the UK by 2015. The Club has invested £1.9 million is 2014 and will invest a further £1million during winter 2014/15 in site improvements including upgrading toilet and shower blocks, new reception buildings and site shops, resurfacing site roads, more hard standing and electric hook-up pitches, new children's play areas and site security measures.

Many independent touring caravan and camping parks are also investing in improving and developing their sites and facilities. The sorts of investments that are being made include the following:

- the installation of electric hook-up points;
- the development of hard standing pitches, which allow winter use by tourers and motor homes;
- the development of fully serviced pitches with water and drainage connection;
- investment in site infrastructure e.g. drainage, roads, lighting, signage, entrances;
- improvements to landscaping and site layouts;
- better quality, heated toilet and shower blocks;
- new laundry facilities; and
- leisure facilities, for example, games rooms, saunas, gyms, internet rooms:
  - the development of children's play areas and improvements to existing play areas;
  - catering operations;
  - on-site shops;
  - installation of Wi-Fi;
  - improved access and facilities for disabled guests;
  - the introduction of camping pods and glamping units.

The 'greening' of touring caravan and camping sites in terms of promoting biodiversity, reducing environmental impact and encouraging guests to engage in environmentally sustainable activities has also been a key trend in the sector that looks set to continue. Examples include investing in environmentally sustainable technologies for electricity generation, water heating and waste recycling; promoting bio-diversity through creating wildlife areas and planting to encourage butterflies and bees; and providing nature and orienteering trails, cycle hire and wildlife watching activities. The Caravan Club is firmly committed to boosting its green credentials with a number of policy initiatives across its sites network, including using biodegradable and environmentally-friendly products, building with timber from sustainable sources, shredding tree prunings on site to use as mulch, and using low-energy lighting. The Club has made a major commitment to eco-friendly caravanning through a £1.8 million investment in its Poolsbrook Country Park Club site near Chesterfield in Derbyshire, including trialing a whole range of energy and water efficient technologies such as solar panels and photovoltaic cells, wind turbines, rain water harvesting and grey water recycling, geothermal energy and heat recovery ventilation systems, for possible roll out to other sites. The Club also has 43 sites that have signed up to its Boosting Biodiversity programme.

The other key development trend in the sector has been the **lengthening of the season** with many site operators now wanting to operate over a longer period and increasing numbers of sites looking to stay open throughout the year. The higher specifications of today's touring caravans and motor homes is resulting in growing numbers of owners wanting to use their caravans and motor homes throughout the year. Sites are increasingly investing in hard standing pitches to enable them to cater for this demand. Planning restrictions have not necessarily kept pace with this market demand, underpinned by concerns about permanent residential use.

The recession, together with innovations in easy-to-erect tents and camping equipment, have stimulated strong growth in demand for camping in the UK, despite the poor summer weather in 2011 and 2012. In a survey undertaken by Campsites UK in 2013, 23% of campers indicated that the current economic climate had made them more likely to choose a camping holiday in the UK and nearly two thirds said that wet weather would not force them to pack up and go home.

Eco camping

Another emerging trend is the development of eco camping sites. These are small, low impact, environmentally friendly, off-grid camp sites with solar or wind powered showers and eco/ compost toilets. They often have a central campfire area and/or allow campers to have their own campfires. Some sites offer secluded and isolated pitches for individual camping. Sites may have wildlife areas and some offer nature study and environmental activities and courses. Examples are Cerenety Camp Site in Cornwall (www.cerenetycampsite.co.uk), Northlodge in Pembrokeshire (www.eco-camping.co.uk) and Comrie Croft in Perthshire (www.comriecroft.com/sleep/eco-camping.html). In some cases eco camping sites also offer glamping units or glamping sites have opened eco camping sites. Eco Camp UK (www.ecocampuk.co.uk), for example, offers fully equipped bell tents alongside forest tent pitches at its Beech Estate ecological woodland camp site in East Sussex, while The Secret Camp Site (www.thesecretcampsite.co.uk), also in East Sussex offers a glamping unit and a tree tent alongside its eco camp site. Comrie Croft has 5 Norwegian Kata tents. Dernwood Farm (www.dernwoodfarm.co.uk/wild-camping) offers wild camping alongside safari and bell tents and a woodland log cabin.

Tree camping

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

- Red Kite Tree Tent in Mid Wales (www.sheepskinlife.com/relax-at/red-kite-tree-tent);
- Treehotel in Sweden (www.treehotel.se), which features 5 quirky, individually designed 'treerooms' and a tree sauna;
- The Tree Tent at The Secret Campsite in East Sussex: (www.thesecretcampsite.co.uk/secret-shelters); and

- Lost Meadow Tree Tent in Bodmin, Cornwall: (www.canopyandstars.co.uk/britain/england/cornwall/broom-park-farm/lost-meadow-tree-tent).

Camping pods

Camping pods were first introduced in the UK at the Eskdale Camping and Caravanning Club site in the Lake District in 2008. The site has 10 camping pods priced at £43.75 per night. They are made from locally sourced timber and insulated with sheep's wool. They have hard foam floors, French windows, wooden decking areas, heaters and electric lighting. Each pod sleeps 4 people. They have proved extremely popular and have even attracted demand during the winter. The Camping and Caravanning Club has now introduced camping pods and dens at its club sites in Bellingham, Northumberland; Hayfield in the Peak District; Ravenglas in Cumbria; Skye; Gulliver's Kingdom at Milton Keynes; and Thetford Forest www.campingandcaravanningclub.co.uk/ukcampsites/club-glamping/camping-pods.

Newfoundland Leisure Lodges, the company that manufactured the pods for these sites, reports huge interest in the concept, which is rapidly developing throughout the UK. The company has now supplied camping pods to over 70 sites across the country.

The YHA has introduced camping pods alongside its hostels at Malham and Grinton in the Yorkshire Dales, Hawkshead and Borrowdale in the Lake District and the South Downs hostel in East Sussex (www.yha.org.uk/places-to-stay/alternative-accommodation/camping-pods). The National Trust is another organisation that has started to offer camping pods at three sites in the Lake District, Clumber Park in Nottinghamshire and a site in Northern Ireland www.nationaltrust.org.uk/holidays/camping/camping-pods.

Camping pod encampments and parks are now starting to develop across the UK. Examples include:

- West Stow Pods in Suffolk (www.weststowpods.co.uk);
- Bryn Dinas Camping Pods in Snowdonia (www.bryndinascampingpods.co.uk);

Holiday parks, holiday lodge parks, touring caravan and camping sites and hotels are increasingly introducing camping pods as an alternative accommodation option. Examples are:

- the Pure Leisure Group has introduced camping pods at three of its holiday parks (http://www.pureleisuregroup.com/holidays/camping-pods);
- the Hillcrest Park touring caravan park at Caldwell in County Durham (www.hillcrestpark.co.uk/pods) introduced 3 camping pods in August 2011, increasing this to 5 pods in March 2012 and 10 in October 2012 due to the strength of demand.
- the Old Thorns Manor Hotel and Golf Club at Liphook has developed a number of luxury eco pods adjacent to the hotel as an alternative accommodation option (www.oldthorns.com/home/accommodation-old-thorns-hotel-hampshire/luxury-eco-pods); and
- Woodland Park Lodges at Ellesmere in Shropshire has 5 camping huts alongside 11 holiday lodges (www.woodlandparklodges.co.uk/camping-huts.html).

Glamping

A key trend in recent years has been the rapid growth of glamping (glamorous camping) offers, in terms of ready-erected, fully-equipped tents, yurts, tipis and other unusual forms of camping and caravanning accommodation. These types of accommodation have proved to be popular with more affluent families that want to experience camping holidays but without the hassle of having to bring their own tents and camping equipment. As a new form of accommodation they have attracted significant media coverage and wherever they have opened such accommodation operations have quickly attracted strong demand. Go Glamping (www.goglamping.net), the leading online directory of luxury camping sites, now lists 200 locations in the UK. Key luxury camping products that have so far emerged in the UK are as follows:

- **Feather Down Farms** (www.featherdown.co.uk) is a concept that has been operated in the UK since 2005 by the Feather Down Farm Days Company as a seasonal luxury camping holiday option. Originally developed in Holland, the concept involves Feather Down Farm Days providing working farms with 5-10 fully equipped Feather Down tents for erection between Easter and October. The tents provide spacious, ready-to-use camping accommodation including beds, bedding, a toilet, wood-burning cooking stove, cool chest and cooking equipment. The farmer is responsible for providing a cold water supply to each tent and connection to a mains sewer or septic tank, together with the provision of a communal hot shower facility. Feather Down Farm Days runs a national marketing, advertising and PR campaign and provides a central booking system. The company now has 34 sites across the UK. Their development strategy has focused initially on locations that are within a 2 hour drive time of London, as this is their core market. These holidays require some affluence, at circa £1000 for the week, and they recognise that they are aiming at the educated city dweller wanting rural family 'experience' for themselves and their children.

- The team behind Feather Down Farms launched a sister company, **Country Retreats** www.featherdown.co.uk/country-retreats), in November 2014 aimed at other land and country estate owners that want to provide canvas lodges and/or fully collapsible log cabins and become part of The Country Retreats Collection. The company hope to roll out 50 of the new log cabins across country estates and farms in the UK by the end of 2015.

- **Ready-pitched luxury camps:** Jolly Days Luxury Camping (www.jollydaysluxurycamping.co.uk) in North Yorkshire is a boutique campsite that offers the ultimate in luxury camping, with 8 large lodge tents with four poster beds, sofas and chandeliers, 7 vintage style tents and 7 bell tents. Shieling Holidays (www.shielingholidays.co.uk) on the Isle of Mull provides 16 fully equipped Shieling cottage tents, which take their name from the summer cottages that Highland shepherds traditionally use. The tents are equipped with proper beds and fully equipped kitchens and have electricity and gas heaters. Some also have shower and toilet facilities. Dandelion Hideaway (www.thedandelionhideaway.co.uk) in Leicestershire offers a number of canvas cottages.

- **Yurts**, based on the Mongolian yurt, are wooden frame, insulated circular tents that are usually furnished with beds, wood burning stoves and kitchen equipment. The Bivouac (www.thebivouac.co.uk) on the Swinton Estate in the Yorkshire Dales has 8 yurts and six timber frame shacks. Each yurt sleeps 5 and comes with beds, bed linen, a terracotta cold store, wood burning stove and gas burner for outdoor cooking on a wooden veranda. Lincoln Yurts at Welton in Lincolnshire (www.lincolnyurts.com) offers 5 themed yurts that are fully equipped with beds, bedding, a gas stove, BBQ and decked seating area and supported by a bathroom cabin with a Jacuzzi bath. Other examples area Hidden Valley Yurts in Monmouthshire (www.hiddenvalleyyurts.co.uk) and Yurtshire (www.yurtshire.co.uk) which has two yurt camps in North Yorkshire and one in Warwickshire.

- **Tipi** sites offer a similar set up. Examples include Wild Northumbrian Tipis and Yurts (www.wildnorthumbrian.co.uk); Lincolnshire Lanes Camp Site in the Lincolnshire Wolds (www.lincolnshire-lanes.com); Eco Retreats in Powys, Wales (www.ecoretreats.co.uk); and 4 Winds Lakeland Tipis (www.4windslakelandtipis.co.uk) in the Lake District.

- Wooden **wigwams** rented out at around 20 sites in Scotland and the North East of England are another alternative. Northumbria's Pot-a-Doodle-Do (www.northumbrianwigwams.com) has 12 wooden wigwams sleeping 4/5 people. Each wigwam is fully insulated and has electric lighting and heating. Foam mattresses are provided. The site has a central shower and toilet block, kitchen for guests' use and licensed restaurant on site. Springhill

Farm in Northumberland (www.springhill-farm.co.uk/wigwams) offers a number of wooden wigwams alongside self-catering cottages and a touring caravan and camping site. Wigwam Holidays (www.wigwamholidays.com) that supplies wooden wigwams to farmers and landowners that the company then markets under its Wigwam Holidays brand. The company now has 60 sites across the UK.

Other examples of glamping camping offers include:

- **Geodesic domes** for example, The Dome Garden (www.domegarden.co.uk) at Coleford in Gloucestershire has 10 geodesic ecodomes equipped with wood burning stoves, beds, private flushing toilets, a fully-equipped outside kitchen area with fridge and timber en-suite hot shower. Another example is Ekopod (www.ekopod.co.uk) in Cornwall.
- **Persian alachigh tents**, similar to yurts for example, Penhein Glamping near Chepstow in Monmouthshire (www.penhein.co.uk).
- **Gypsy caravans** for example, Gypsy Caravan Breaks in Somerset (www.gypsycaravanbreaks.co.uk) and Roulotte Retreat in the Scottish Borders (www.roulotteretreat.com), which has 4 French roulette caravans for hire.
- **Retro caravans** for example, Vintage Vacations on the Isle of Wight (www.vintagevacations.co.uk), which has a collection of 13 vintage American Airstream and Spartan caravans for hire; Happy Days Retro in East Dorset (www.happydaysrv.co.uk) with four airstream caravans available for hire for holidays; and Mad Dogs and Vintage Vans in Herefordshire (www.maddogsandvintagevans.co.uk), which has four vintage caravans.

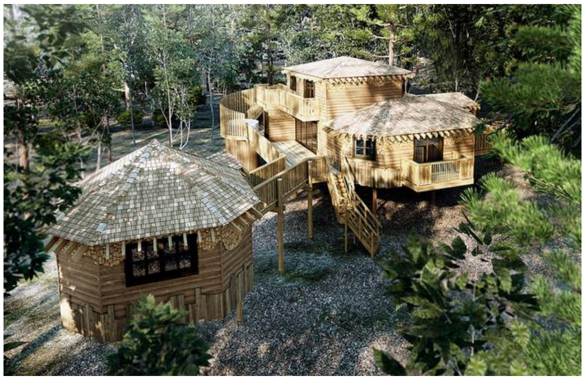
- **Shepherds Huts** for example, Herdy Huts in the Lake District (www.herdyhuts.co.uk) and Shepherds Huts South East (www.shepherdshuts-southeast.com) in Kent.
- **Safari Tents** for example, the Camping and Caravanning Club has four safari tents for hire at its club site at Gulliver's Kingdom theme park at Milton Keynes and one at its club site at Teversal in Nottinghamshire.
- **Bubble camping** in transparent inflatable tents was introduced in France in 2010 but has yet to come to the UK.
- **VW camper van pop-up camps** for example, Volkswagen Commercial Vehicles partnered with booking website LateRooms in 2014 to provide 6 VW California camper vans for hire on a nightly basis at Temple Island in Henley-on-Thames.
- **Cargo pods**, converted from shipping containers have been introduced at the Lee Wick Farm glamping and touring site at St Osyth, near Clacton-on-Sea in Essex (www.leewickfarm.co.uk).

Treehouses

An interesting, although very niche self-catering accommodation product that has emerged in the UK in recent year, is self-catering treehouses. A number of these have been developed across the UK, primarily as individual units. They are generally very high quality. They clearly have appeal to the family market. Center Parcs has opened a small number of luxury two-storey treehouses at its holiday villages in Sherwood Forest and Longleat Forest. Aimed primarily at the family market the treehouses include 4 en-suite bedrooms; an open plan kitchen, dining and living area; a games den (accessed along a timber walkway) with plasma TV, pool table, games console, Blu Ray player and a bar area with fridge; and a private hot tub. (www.centerparcs.co.uk/accommodation/By_Type/treehouse.jsp). Forest Holidays (the Forestry Commission) has introduced luxury Golden Oak Treehouse Cabins at its forest cabin holiday sites in Cornwall, Forest of Dean, Blackwood Forest in Hampshire, Sherwood Forest, Thorpe Forest in Norfolk and North Yorkshire (www.forestholidays.co.uk/cabins/cabins/treehouse.aspx).

Other examples in the UK include:

- The Treehouse at Lavender Hill Holidays, Somerset (www.lavenderhillholidays.co.uk/properties.asp?id=101)
- Gwdy Hw, Powys, Wales (www.canopyandstars.co.uk/britain/wales/powys/living-room/gwdy-hw)
- Brockloch Treehouse in Dumfries & Galloway (www.brockloch.co.uk);
- The Lime Treehouse, Worcestershire (www.canopyandstars.co.uk/britain/england/worcestershire/little-comberton/lime-treehouse).



Children's activity holiday centres

The children's activity holiday centre sector has expanded in the UK in the last 10 years and is identified as having potential for further expansion. The sector is made up of many different operators, from those with multiple centres across several countries to smaller, family-run independents. Centres range in size from 50 to 900 beds and are operated largely by the private sector but also by local authorities and charitable organisations.

The two main commercial players in the sector are PGL and Kingswood. Both companies have been the subject of high profile acquisitions. PGL was acquired by Holidaybreak plc in May 2007 for £100m. Kingswood was acquired by DJL Merchant Banking (a division of Credit Suisse Bank) in July 2008, also for £100m. Both companies have since nearly doubled in size and now handle around 500,000 children each year. PGL opened the former Windmill Hill Place Tennis Centre near Herstmonceux in East Sussex as a children's activity holiday centre in May 2009 following a £7m revamp. The centre now offers activity courses for school and youth groups, together with summer camps and family activity holidays during the summer. The centre can accommodate up to 450 guests in bunk–bedded accommodation and new 4-6 person en-suite lodges. Facilities include a sports hall, swimming pool, climbing tower and zip wires and a multi-sports area. Existing lakes are used for canoeing and raft building. The centre has created 130 jobs. PGL also opened a new holiday centre at Liddington, near Swindon, in 2010 through the conversion of the former Liddington Hotel. It can accommodate up to 1,000 children and employs 250 staff.

The other key player in the children's activity holiday centre market is JCA Adventure, which became part of TUI Travel plc in 2007. It works with 13 UK centres and two centres in France to provide multi-activity courses of 2-4 nights, netball tournaments and summer camps for young people. The company launched its first JCA-owned activity holiday centre at Condover Hall in Shropshire in 2011.

For new centres, these operators would require properties of a substantial size within their own formal grounds ideally with access to lakes, rivers and woodland. They will consider leaseholds and freeholds in rural and semi-rural locations. A residential institution use class (C2) on properties, such as former boarding schools or residential colleges, can be an advantage but is not essential.

Future interest in visitor accommodation development in The National Forest

Accommodation development proposals

Our research has identified the following proposals for additional visitor accommodation in The National Forest area:

- planning permission has been granted for a number of new holiday lets in terms of log cabins, holiday lodges and chalets, and self-catering barn conversions. These are either for single units or small developments of 2-5 units. A proposal for 9 log cabins was approved at Gunby Hill, Netherseal in 2013. Most of these proposed holiday lets are in South Derbyshire. A few are in North West Leicestershire, Hinckley & Bosworth and East Staffordshire;
- some of the touring caravan and camping site operators that we spoke to indicated that they might introduce further hard standing pitches in the future and/or some camping pods;
- the Branston Locks development at Burton-upon-Trent includes provision for a hotel of up to 80 bedrooms;
- St George's Park is considering the development of a 140-bedroom lodge hotel to provide a more basic standard of accommodation for some of the football teams that come to train at the National Football Centre - this could open in 2018;
- the Holiday Inn Express in Burton-upon-Trent has planning permission for a further 45 guest bedrooms; and
- Whitemoor Lakes Centre will add a further 21 bedspaces in 2016.

Land owner interest/site availability

Our email/online survey of land owners in The National Forest identified interest in possible visitor accommodation development projects from six land owners. This included potential interest in holiday lodges/log cabins, camping, glamping, camping pods, touring caravan sites and outdoor education with camping. All of the land owners were at the very initial stages of considering such development opportunities. In some cases, the interest appears to have been stimulated by our survey. Most of the land owners that responded indicated that they would need further information and assistance to better understand what the opportunities might be for visitor accommodation development on their land.

One of our consultees with a significant land holding indicated possible interest in visitor accommodation development, including possibly a holiday lodge park of scale.

The chair of the Central Rivers Initiative (CRI) has provided an initial response to our consultation indicating that there could be some suitable sites for large-scale waterside holiday lodge parks in the CRI area.

The National Forest Company Economic Opportunities report produced by Rural Futures (North West) identifies three sites in The National Forest that the consultants felt could be suitable for touring caravan and camping site, glamping or camping pod developments.

Commercial accommodation developer interest

Testing the interest of visitor accommodation operators, developers and investors in being represented in The National Forest provides an additional angle on the market potential here. It also enables a live perspective to be gained on the strengths and weaknesses of The National Forest as an investment location for different types of visitor accommodation, but also an opportunity to warm up interest and flag up that The National Forest Company and its partners are being proactive in trying to plan for, stimulate and facilitate the development of an appropriate accommodation infrastructure for visitors to The National Forest.

We have undertaken an email and telephone survey of a sample of national visitor accommodation companies following our visitor accommodation performance and market assessment work. The focus was on testing developer interest in potentially bringing forward destination accommodation schemes in The National Forest, including holiday lodges/lodge parks, caravan and camping, glamping and children's activity holiday centres. The accommodation companies that we approached are known to be active in the market nationally, and therefore have a broader view of the competitive environment and how The National Forest might fit within this. The sample also included an agent who acts for a number of accommodation developers, operators and investors, from initial site search through to delivery, again usefully bringing a bigger picture view and also a cross-sector input.

Responses were received from 6 of the 10 consultees, of which 4 were interested in developing, operating or investing in visitor accommodation in The National Forest. Their interest by type of offer covered holiday lodge parks of scale, small holiday lodge developments in up-market settings, glamping provision and children’s activity holiday centres.

For accommodation companies that were not interested in being represented in The National Forest there was a mixture of reasons, most notably that they already had a visitor accommodation operation either based in the area or in the wider surrounding area, which meant they felt they had covered the market in this patch. Others were not interested in new build opportunities but would consider acquiring an existing accommodation business that could be redeveloped, upgraded and/or expanded, giving certainty around planning and a basic infrastructure (sewerage, drainage, electrics and other services) to help control costs and minimise development risk.

In terms of how The National Forest is perceived as a location for visitor accommodation investment, there are a number of issues. Generally there was a lack of clarity about the area defined as The National Forest (we subsequently sent out a map to articulate this). A look at the website, however, produced some positive feedback, albeit for a number based on a relatively uninformed knowledge of having visited the area, its key towns and countryside. One developer/operator had previously looked at/expressed interest in this area for a visitor accommodation operation and two were currently involved with working up schemes in Nottinghamshire, not too far from The National Forest. Depending upon scale, this can either rule out a new site within the market area, or be a positive influence for the development of a sister site that could be jointly managed.

Some key issues surrounding the potential development of visitor accommodation in The National Forest, particularly developments of any scale, focus around a number of perceived barriers:

- this area lacks the appeal and awareness of more traditional holiday destinations, urban, coastal and rural. In competitive terms it doesn't stand up well to the high quality environments of the National Parks and AONBs which already have a strong visitor base and market awareness;
- the significant infrastructure costs and planning risks associated with new build development, which a number of the potential opportunities are likely to be;
- a scarcity of sites with existing visitor accommodation use available for re-positioning;
- the difficulty of securing bank finance and the requirement for significant equity sums in what are essentially capital-intensive investments – whilst this doesn't just apply in The National Forest, it is an unproven location compared to more traditional holiday destinations; and
- for some up-market offers that have a high price-point, the need for an affluent catchment within a 2 hour drive of London and a preference for the South East and Home Counties

These barriers are weaknesses in The National Forest's competitive positioning to attract visitor accommodation development, but it does have some strengths – a large catchment given its central and accessible location; the availability of sites, including those requiring remediation from sand and gravel working, but also woodlands and estates; and a facilitating planning framework, as opposed to the constrained environment found in areas of high landscape protection. There is an opportunity to play to these strengths, particularly given developers' concerns about risks surrounding planning and the ability of destination visitor accommodation developments to create their own high quality environment on site.

Appendix H – Attraction and activity audit

Visitor attractions

The visitor attractions sector in the UK is vast and fragmented. There are all manner of attractions in the UK encompassing museums, art galleries, heritage attractions, historic properties, theme parks, zoos, wildlife attractions, science centres, gardens, steam railways, cathedrals and more. Some attractions receive millions of visitors annually whilst some receive hundreds. Some attractions have free admission whilst some charge for admission. Some attractions receive public subsidy whilst others rely on entirely on earned income. Some attractions are run for profit whilst some are run not for profit. This disparity of scale, ownership, operation and finance means that it is misleading to draw conclusions about the performance of visitor attractions as a single sector.

There are however a number of trends across the sector which provide useful insight:

- historic properties (castles, stately homes, estates) are doing very well – 30% growth in five years;
- zoos and wildlife attractions have also seen increased numbers of visitors over the last five years;
- attractions in London are doing very well on the back of increased numbers of overseas tourists;
- free admission attractions have seen increased admissions;
- attractions owned by the Merlin Entertainments group are doing very well (LEGOLAND, Alton Towers, Chessington, Thorpe Park, Warwick Castle, Dungeons, London Eye, Sea Life Centres plus others);
- attractions which have continually invested and kept pace with more sophisticated tastes and preferences have seen increased attendance;
- memberships and season passes are driving strong attendance growth particularly in zoos, historic properties and theme parks; and
- Major family attractions are adding hotels. LEGOLAND, Chessington, Drayton Manor, Gullivers have all built hotels in recent years capitalising on the trend towards domestic short breaks.

Visitor attractions in the National Forest include:

- **National Memorial Arboretum –** is the national centre of remembrance commemorating those who have served the UK (armed forces, police, fire, ambulance, charities and overseas organisations). There are several memorials, a visitor centre with a café and the arboretum is made up of 50,000 trees. Admission is free and the site receives around 280,000 visitors per annum.
- **Calke Abbey House and Estate –** a national trust property billed as the ‘unstately home’. With very little of the house restored, Calke Abbey tells the story of the decline of a stately

home. Adult admission to the whole property (house, gardens, stables and estate) is priced at £12.10. The estate (including park) receives around 270,000 visitors per annum (an increase of 12% over the last five years). Around 170,000 visitors only use the park. The NT has early plans to develop a new 'hidden' building within the park providing a café, toilets and a multipurpose activity space for visitors.

- **Conkers –** is the visitor centre for the National Forest providing a mix of indoor and outdoor attractions including play areas, woodland walks, climbing, exhibitions as well as retail and catering outlets. General adult admission is around £8. Visitor numbers have averaged around 200,000 per annum but have been declining in recent years.
- **Ashby de la Zouch Castle –** a castle and manor house dating back to the 12th century now managed by English Heritage. Audio guides and guided tours are available. Adult admission is £4.80. The castle receives around 160,000 visitors per annum.
- **National Brewery Centre –** the former Bass Museum reopened as the National Brewery Centre in 2010 and celebrates the social history of brewing in Burton and the UK. The museum also includes a café and restaurant. It is also host to a number of events and functions. Adult admission is £8.95.
- **Snibston Discovery Museum –** aimed at families with children, this museum includes exhibitions on fashion, design, technology, science and industry. Set on the site of a former colliery, the museum also offers tours of the remaining pit buildings. There are play areas, a café, a theatre and a gift shop. Adult admission is priced at £7.95 and the museum receives around 90,000 visitors per annum.
- **Sharpe's Pottery Museum –** this fully restored pottery and kiln has exhibitions on the once prolific pottery industry in South Derbyshire with a particular focus on the manufacture of toilets. Other exhibitions include brick making, decorative pottery, local landscapes and a changing temporary exhibition. The site also hosts a tourist information centre, café and gift shop. Admission is free with the museum welcoming around 72,000 visitors per annum.
- **National Forest Adventure Farm –** farm attraction aimed at families with small children with attractions including animals, indoor and outdoor play, maze and café. Admission is priced at £9.75 in peak season. Annual attendance is around 60,000.
- **Tropical Birdland –** is a collection of over 250 birds housed in aviaries (with some free flying). There are play areas, woodland walks, a café and a gift shop. The park is open all year round and admission is £7.25 per adult.
- **Battlefield Line Railway –** a steam and heritage railway running on part of the former Ashby-Nuneaton Railway. Shackerstone Station includes a museum, tea room and souvenir shop. Adult return fares are £10. The railway received 25,000 in 2011.
- **Moira Furnace Museum –** industrial and social history museum located in a former iron blast furnace. Boat trips are also offered on the canal. The museum is open every weekend between Easter and the end of September and six days a week during school holidays.
- **Melbourne Hall and Gardens –** a private stately home and estate which runs guided house tours during August whilst the gardens are open three days a week between April and

September. Adult admission is priced at £6.50. The Hall and Gardens attract around 6,000 visitors per annum.

- **Ashby de la Zouch Museum –** located in the centre of Ashby de la Zouch, this is a small local history museum. It is run by a charitable trust and is staffed by volunteers. It receives financial support from Ashby Town Council. Adult admission is £1. It receives around 5,000 visitors.
- **Marston's Brewery Tours –** the brewery runs a number of pre-booked tours during the week. The adult admission price is £7.50. It is estimated that the tours attract 3,000 people per annum.
- **Measham Museum –** a small local history museum operated by volunteers, the museum is open three days a week and charges £1 for admission. It welcomes around 1,500 visitors per annum.
- **Catton Hall –** is a private estate opened only on Mondays in August.
- **Bradgate Park –** is an 800 acre public park which offers guided walks and an events programme, as well as a visitor centre, cafe and shop. The majority of visits are made by locals although the site is increasingly attracting visits from elsewhere in the region with some national and international visits. The site has plans to improve the visitor centre in 2016 and to redevelop the visitor centre, café and shop as a second stage development. Visitor numbers are around 400,000 to 450,000 annually.
- **The Woodland Trust –** operates three main woodland sites within The National Forest: Willesley Wood; Martinshaw Wood; and their flagship site in the area, the Queen Elizabeth Diamond Jubilee Wood. The sites offer free open access to woodland and site interpretation. The Queen Elizabeth Diamond Jubilee Wood has a charged carpark. The majority of visitors are local people and dog walkers as well as some school groups. It is thought that visitors to The National Forest may use the sites although at this time there is no research available. In general The Woodland Trust does not develop visitor centres or other facilities. The main development priority for the sites in the forthcoming year is to improve the visitor arrival experience and signage.

Other major attractions within close proximity to the boundaries of The National Forest include Kedleston Hall, the Grand Central Railway, Sudbury Hall and Museum of Childhood and Twycross Zoo which all attract over 100,000 visitors per annum (Twycross attracts around 500,000).

Active leisure

Cycling

Cycling has seen a resurgence in recent years with 14% of UK adults considering themselves to be regular or occasional cyclists. Whilst there are still more men than women cyclists, there has been a strong growth in the number of women taking up cycling in recent years. Around 2.5% of UK adults are regular or occasional mountain bikers. Cycling (of all forms) tends to be favoured by more affluent people. Mintel[17] estimates that around 7% of the UK population has taken a holiday involving cycling in the last five years.

The National Forest offers many opportunities for cycling particularly for novices, families and those seeking a more sedate cycling experience:

- The **Ashby Woulds Heritage Trail** runs along part of a former railway. It is flat and very accessible. At 4.5 miles, it offers a good cycle trail for beginners, families and those looking for a more sedate cycle route. The 4.5 mile circular trail at **Conkers** also provides an accessible cycling route for families and the less serious cyclists.
- **Hicks Lodge: The National Forest Cycle Centre** is home to the National Forest Cycle Centre where visitors can explore a number of trails around the woodlands. These trails are suitable for beginners, families and the less serious cyclists. Bike hire is available and there is a café. Use of the trails of free of charge although there is a charge for parking. It attracts an estimated 150k users.
- The **Rosliston Forestry Centre** also provides bike hire and a number of family cycling trails through the adjacent woodlands. There is also a more challenging mountain bike trail. It attracts an estimated 90k users.
- Cycle paths also exist in Beacon Hill Country Park, Bradgate Park, Donisthorpe Woodland Park and Sence Valley Forest Park.

Walking

Walking, hiking and rambling have also seen a resurgence in recent years with 42% of the adult population engaging in some form of walking either regularly or occasionally. It is an activity that is common across all age groups and income brackets. Walking is also one of the most commonly undertaken activities whilst on holiday in the UK. Mintel[18] estimates that 22% of the population has taken a holiday involving walking in the last five years.

As is the case with cycling, The National Forest offers many opportunities for walking. The walking opportunities, however, are not as challenging as other destinations such as the Peak District or the Lake District. The National Forest offers good walking opportunities for families, beginners or those looking for a more sedate experience.

The National Forest website lists 15 different walks of varying distances and difficulties. Most are relatively unchallenging. In addition to the 15 trails, there are further walking opportunities at Branston Water Park, Donisthorpe Woodland Park, Rosliston Forestry Centre, Sence Valley Forest Park, Thornton Reservoir, Staunton Harold Reservoir and the Trent Washlands.

In addition to the circuits and trails, there is the 75mile National Forest Way which runs right through The National Forest. It is divided into 12 stages of varying lengths and difficulty.

Major events and festivals

Many local authorities around the UK have begun to recognise the important role that events can play in driving footfall into town and city centres. This footfall helps to drive business to

[17] Sports Participation, Mintel, 2013.
[18] Sports Participation, Mintel, 2013.

retailers and generates economic impact. Events can also help to generate positive media coverage and valuable PR. In the North West, Manchester City Council and Liverpool City Council have both attached great importance to major events and have supported this with significant annual budgets. Manchester City Council for example, spends around £4m per annum on events including the lucrative Christmas Markets which generates a surplus for the council.

The majority of major music festivals in the UK take place in rural areas and are organised by private companies who pay to use the land on which the event takes place. 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. The following summarises a selection of the biggest UK festivals as shown in Figure H1.

Figure H1: Selection of the biggest UK Festivals

	No of days	Location	Visitor numbers free	Visitor numbers ticketed	Organiser
Music Festivals					
Glastonbury	3	Wiltshire	0	177,000	GFL & Festival Republic
Reading	3	Reading	0	90,000	Festival Republic
Isle of Wight	3	Isle of Wight	0	60,000	Solo
Cheltenham Music Festival					
Family Festivals & Events					
Latitude	4	Suffolk	0	35,000	Festival Rebulic
Womad	4	Wiltshire	0	17,500	Womad Limited
Camp Bestival	4	Dorset	0	30,000	DJ & Rob da Bank
Just So	4	Cheshire	0	6,000	Wild Rumpus
Green Man	4	Brecon Beacons	0	20,000	Independent

Aside from the many small events which take place in individual towns, villages and venues, the largest events and the most unique in The National Forest are:

- **National Forest Wood Fair** – an annual celebration of timber, trees and woodcrafts with lumberjacks, chainsaw carvers, wood mizers and horse loggers. The fair takes place on August bank holiday Monday in Beacon Hill Country Park. Adult admission is priced at £9. Attendance has typically been around 5,000.
- **National Forest Walking Festival –** organised by South Derbyshire Council but also supported by Leicestershire County Council and the National Forest Company, the walking festival takes place over 13 days in May. There are 70 walks to choose from suiting all abilities and fitness levels.

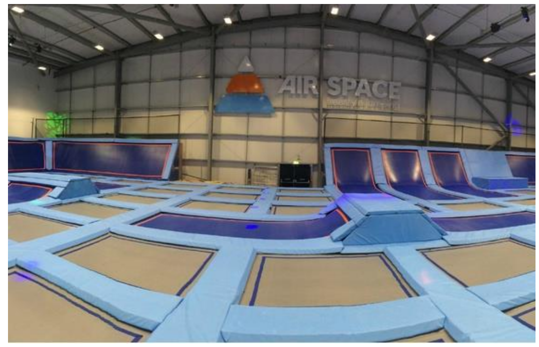
Adventure leisure

The late 1990s and early 2000s saw a very significant increase in the number of attractions being created in the UK. This was largely as a result of Millennium Commission lottery funding. Conkers in the National Forest was indeed created as a millennium project. Others included The

Eden Project, Magna, National Space Centre, Our Dynamic Earth and many others. Many of the attractions created during this period covered very large sites and cost tens of millions of pounds. Within the last ten years, however, there have been far fewer major attractions created in both the private and public sectors. Lottery funding has been re-directed elsewhere whilst the returns to private sector do not justify the very large capital outlay. In the absence of large, major visitor attraction, a number of relatively small scale adventure leisure concepts have emerged in the private sector which do not require tens of millions of pounds of investment nor do they have onerous operating costs. These new concepts in adventure leisure do not require hundreds of thousands of visitors to breakeven but tens of thousands. Their uniqueness creates good PR opportunities for destinations. Some of the concepts include:

- **High ropes courses** – now fairly ubiquitous but fifteen years ago, the concept was an unknown entity with **Go Ape** being first to market. Go Ape entered into an agreement with the Forestry Commission to develop high ropes courses at several sites. Go Ape has since developed high ropes courses with other land owners and franchisees. The company now has 28 sites throughout the UK. Prices are around £30 for a two to three tree top experience where visitors tackle an obstacle course built into the trees including rope swings, bridges, tunnels, zip wires, ladders and walkways. Go Ape is continuing to develop new sites with land owners and each site receives an average of around 20,000 visitors per annum. A typical Go Ape development is constructed amongst 40-50 mature, coniferous trees. **Aerial Extreme** is another operator of high ropes courses in the UK with six sites. The main difference between Aerial Extreme and Go Ape is that Aerial Extreme does not always construct the high ropes courses amongst mature trees (or indeed any trees). Aerial Extreme has high ropes courses which operate in urban areas. There are now dozens of single site operators of high ropes courses. Courses can now be bought 'off the shelf' from suppliers such as **Innovative Leisure** in Leicestershire.

- **Freestyle trampolining – Jump Nation** recently launched a new concept based around freestyle trampolining. Jump Nation is located in Manchester has 130 interconnected trampolines to form one large bounce park. Participants can improvise their own moves in the main arena, freestyle jumping from one trampoline to the next. Alternatively there are a number of team sports that can be played on super-sprung pitches including dodgeball, basketball and football. **Airspace** is another freestyle trampoline site which has been developed in Glasgow by the owners of Go Ape. Jump Nation charges around £9 per hour whilst Airspace charges £12. Both concepts require very large warehouse style spaces. The Airspace centre in Glasgow cost £2m to fit out. A company in North Wales has established a similar concept (**Bounce Below**) by transforming an underground slate mine with trampolines and bouncy nets.



- **Zip wires –** there are a small number of very high and very fast zip wires recently opened 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.

- **Wavegarden** – is a new artificial surfing lagoon developed in Spain. The first site will open in the UK in Dolgarrog, North Wales in summer 2015 and is being developed and operated by Surf Snowdonia. Wavegarden is the world's longest man-made wave that creates ideal conditions for surfing, as well as a broadly appealing range of other wave sports such as body boarding, kayaking, and stand up paddling. Early testing and professional feedback show Wavegarden to be the closest thing to an ocean break. It is likely that the second site will open in Bristol (operated and developed by a different company). The cost of developing a Wavegarden is around £6m.

- **Bewilderwood –** is a woodland adventure park in Norfolk aimed at children and themed around the stories of Tom Blofeld. Opened in 2007, it has won many awards for its theming and the creative way in which it uses the woods and swamps on which it is built. The park consistently attracts 180,000 visitors per annum. The owners and operators of **Bewilderwood** are in discussions with Cheshire East Council to open a second site at Tatton Park (a National Trust site operated on a lease by Cheshire East Council). The development is likely to cost around £6m to £7m with Cheshire East Council offering a loan of £5.5m to Bewilderwood to fund it. It is hoped that the Bewilderwood site at Tatton Park will attract 250,000 visitors per annum. At present, the new development is being held up by planning delays as it has been 'called in' by the Secretary of State.

- **Adventure golf –** a more substantial and themed version of crazy golf or mini golf with animatronic characters, sound effects and lighting. The target audience is families with children aged 4 – 14 and the sessions usually last for 90 minutes. It is seen as a fun way to introduce golf to children. There are many single site operators engaged in Adventure Golf with a number of specialist suppliers. **Burhill Golf and Leisure** (BGL) is an operator with a number of Adventure Golf sites (in addition to 11 formal golf courses and a number of hotels). BGL is looking to expand significantly its portfolio of Adventure Golf sites and has set up a new division with the aim of rapidly expanding this part of its business. BGL has developed four Pirate Island Adventure Golf sites (Milton Keynes, West Yorkshire, Woking and Nottingham) and is actively seeking well-located sites, primarily close to town centres to develop further adventure golf sites.

- **Indoor sky diving –** with sites in Manchester, Milton Keynes and Basingstoke, **Air Kix** offers participants an indoor sky diving experience with the use of wind tunnels which reproduce the feeling of freefall. The operators of Air Kix (**I Fly International**) also own the technology behind the wind tunnels and are actively seeking new opportunities. An indoor sky diving wind tunnel costs around £5m. I Fly International is also offering franchise opportunities.

- **Indoor climbing –** there are many indoor climbing walls and climbing centres throughout the UK. **Clip N Climb,** however, is a unique climbing concept which provides action packed activity with up to 28 individually themed climbing challenges in a variety of sizes. The company behind **Clip N Climb** has granted the master franchise for the UK and Ireland to **Enter Prises Climbing Walls**. There are seven UK sites (Belfast, Cumbria, Stockton on Tees, Bournemouth, Hampshire, London and Exeter) with opportunities for more sites.

New uses for former gravel pits

There are many examples throughout the UK of former gravel pits that have been transformed into **leisure and recreational uses** once they are no longer productive as gravel pits. Branston Water Park in The National Forest is an example of this. Typically, the gravel pits are flooded and handed over to local authorities, wildlife organisations or wetland organisations to be used for public benefit. Over time, the areas surrounding the gravel pits are often planted and landscaped and paths are created for walking, cycling and horse riding.

Many of the former gravel pits have become **havens for wildlife**, particularly those run by The Wildlife Trusts or The Wildfowl and Wetlands Trusts. Many of these sites charge for admission and include visitor centres and amenities.

There are some former gravel pits which have been converted into **private fisheries and angling clubs**. Horseshoe Lake in the Cotswolds is known as one of the finest fisheries in England created out of a former gravel pit. It is owned and operated by the Carp Society. The site includes catering, retail, toilet and shower facilities for anglers. Anglers can purchase an annual pass for £400 or pay by the hour (£1 per hour).

Other gravel pit sites have been converted into **caravan or lodge parks** by private companies and individuals. Pine Lake Resort in Carnforth (Lancashire) is a development of 130 lodges which are available for holiday hire (some are available to purchase). The resort includes a swimming pool, bar, restaurant and watersports centre.

There are also a very small number of former gravel pits that have been transformed into **major attractions**. Thorpe Park (a **theme park** in Surrey) is located on the site of a former gravel pit which was partially flooded. The rides and attractions were built on the 'islands' between the newly created lakes. The park was created by the concrete company which owned the site and gradually developed between 1979 and 1998 before it was acquired by the entertainment and theme park company, The Tussauds Group. The theme park has become one of the most visited theme parks in the UK with two million visitors per annum. The park is now owned by Merlin Entertainments, the second largest attractions company in the world, which operates Alton Towers, LEGOLAND, Warwick Castle, the London Eye, Madame Tussauds, as well as many other attractions throughout the world.