

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



5 Market Yard Mews
194 Bermondsey Street
London
SE1 3TQ
Tel: 020 7642 5111
Email: cevans@thetourismcompany.com

INTRODUCTION

The National Forest (TNF) needs to address tourism because this is where it now has an emerging comparative advantage and there is a strategic objective to establish a National Forest that is attractive for residents and visitors. Tourism is already an important part of the wider economy contributing £267m in 2007, supporting over 4,000 jobs in the local area. Tourism facilities in and around the Forest also add to the quality of life and help make an area an attractive place in which to live, work and do business. This report provides the new Vision for tourism to 2028 and the first five year action plan (2009-2014).

CURRENT TOURISM CONTEXT

The report reviews a number of key issues in relation to the current visitor experience, the existing visitor market, current performance of the destination and organisation of tourism in the area. This is followed by a review of the broader public policy context within which tourism sits i.e. the tourism strategies being followed by the relevant agencies and the broader planning and community development policy context for the local area.

STRATEGIC CONTEXT AND CHANGE

TNF, like all visitor destinations, needs to identify and respond to internal and external forces and consider potential scenarios in order to effectively control and manage its tourism development and compete in the market place successfully. Understanding and responding to change is critical to devising a robust strategy for the future.

In the report, we consider the drivers of change e.g. economic, demographic and tourism trends, changing lifestyles, new technology and environmental pressures and the implications for the future of tourism, drawing these conclusions into a SWOT analysis based on the existing tourism and policy context and consider scenarios for the future.

SWOT analysis

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

<p>Opportunities</p> <ul style="list-style-type: none"> • Large diverse and growing catchment population to exploit • Robust environment with scope for further development, targeted new planting and access opportunities particularly through new woodland trails and water spaces • Investment associated with new visitor infrastructure/facilities and growth points • Growing interest in environmental issues • Growing interest in healthy, outdoor pursuits • To support and benefit from a range of cross-cutting initiatives • Behavioural changes related to climate change 	<p>Threats</p> <ul style="list-style-type: none"> • Long-term recession • Lack of investment • Reduced management resources • Constraints on travel • Lack of commitment to common Vision • Lack of commitment to the Forest brand • Heightened competition from other rural destinations • Inconsistent planning policy approach for tourism infrastructure • FMD or similar
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It is difficult to consider potential scenarios over a 20 year period, particularly in the light of the current economic climate but we draw out three possible, long-term scenarios for consideration in TNF under the headings of ‘managed growth’, ‘financial meltdown’ and ‘the environmental imperative’.

Further details of the tourism product and policy context, the drivers of change and consultation including a report of an operator survey are given in the main report with full details in a set of Appendices to the main report.

THE TOURISM VISION FOR THE NATIONAL FOREST

Notwithstanding the external drivers and potential scenarios, the future of tourism in TNF will be largely determined by internal aspirations, the Vision for tourism for The National Forest and its surrounding area and the commitment to that Vision by stakeholders. The new Vision is based on a number of key assumptions and five over-arching principles. The key assumptions are that:

- A successful tourism destination relies upon a wide range of facilities and services that are outside the direct control of tourism agencies including urban regeneration, transport, the arts and cultural development, local recreation facilities and access by all modes.
- By the same token, tourism can help sustain a range of products and activities that help raise the quality of life of residents and meet a number of current cross-cutting objectives including healthy lifestyles, provision for the young, support for the rural economy.
- A long-term Vision is critical. It will take another 20-30 years for the tree cover to reach the target of around one third of TNF area and for much of the new plantation to reach maturity. Landscape restoration and town enhancements have a similar time-line and the growth points will take many years to come to fruition. Tourism development will have to evolve at a similar rate.

The underlying tourism principles for the Vision are: sustainability, quality and value, accessibility and inclusion for all, partnership working and adaptability to different circumstances and scenarios.

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

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

A Vision for tourism in TNF

TNF will be recognized and enjoyed as one of the top ten high quality sustainable destinations in the country. It's 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 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.*
- *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.

STRATEGIC OBJECTIVES AND ACTION PLAN

The strategic objectives for tourism in TNF reflect the vision expressed above, the key strengths of TNF, the policy priorities and the external drivers. The five strategic objectives are:

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

- Improve welcome and information delivery
- Support the development of good quality accommodation
- Become a market leader in high quality land and water based activity holidays
- Develop and coordinate events
- Strengthen the appeal and accessibility of attractions
- Encourage high quality catering and retailing

Strategic objective 2: Enhancing the Forest's environment and infrastructure

- Improve the quality and appearance of the built environment
- Improve the provision and promotion of public transport options
- Support sound environmental management
- Foster local distinctiveness

Strategic objective 3: Improving business practice and performance in TNF

- Raise awareness of business skills shortages
- Improve the appeal of jobs in local tourism

Strategic objective 4: Stepping up the marketing of the Forest

- Define the target markets
- Develop a marketing framework
- Strengthen the destination brand

Strategic objective 5: Working together effectively in the Forest

- Establish appropriate delivery mechanisms for tourism development in TNF
- Monitor visitor satisfaction, enterprise performance and tourism impacts