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# “Realising The Potential”

## A Tourism Strategy For The Forest of Dean District 2003 - 2008

### 1.0 Introduction - Why we need a Tourism Strategy

- 1.1 During 2002 a major **Tourism Development Potential Study** was carried out in the Forest of Dean by Stevens & Associates. This Study highlighted a range of opportunities, which could grow tourism in a sensitive manner for the benefit, and welfare of the local community, through sustainable development based on the Forest’s assets. The commissioning partners in this Study - the Forest of Dean District Council, the South West Regional Development Agency and the Countryside Agency - have all committed to providing funding resources to achieve some of the projects identified in the Study and the Strategy will be delivered by this partnership. However these developments need to be put into a formal strategic framework, so that development is planned and appropriate. This Strategy provides the rationale for tourism activity in the Forest over the next five years.

### 2.0 Context

- 2.1 The economy of the Forest continues to change and evolve. Major elements of the economy have been lost or are in decline. This is especially the case with regards to the manufacturing sector where significant employers such as Xerox, Watts and SCA Packaging have shed labour in the last few years. Despite these job losses, the Forest still retains a relatively high proportion of manufacturing industry which is subject, as ever, to global competition and which creates vulnerability in the employment base.
- 2.2 There is therefore a continuing need to refresh the number of businesses in the area, accepting the continuing decline of manufacturing sector and building on the growth of the service sector.
- 2.3 The Draft Forest of Dean Employment Study published by WM Enterprise in July 2003 notes that in order for the economic base to be sustainable into the future there needs to be a broad range of sectors represented, so as to reduce vulnerability to changes in any particular areas of the economy. Preferably, these new sectors should be from the stable and growing areas of the economy, and plug into the higher added value knowledge economy such as ICT. Critically they

should also take advantage of the location benefits and distinctiveness of the Forest and not serve to spoil the environment.

- 2.4 It is notable that in this context, tourism is viewed as an employment sector. It is an industry in its own right and if developed in a particular way, it can bring employment benefits to the area. The Tourism Development Potential Study indicates a latent potential within the Forest to increase tourism and this should be supported especially where such tourism leads to job creation.
- 2.5 Tourism can contribute significantly to achieving a more balanced employment base as the Forest of Dean is one of the most distinctive parts of the United Kingdom – distinct geographically, topographically, culturally and historically and it is these characteristics which create the area's primary appeal as a destination for tourism.

### **3.0 Why does Tourism matter?**

- 3.1 Tourism is one of the largest industries in the UK, accounting for **3.5%** of the UK economy and worth approximately **£74.2 billion** in 2003 (source : Visit Britain). Tourism is worth some £90 million per annum to the Forest of Dean, employs about 2,300 and constitutes 6% of employment in the District. The Forest receives around 1.7 million day visitors each year and around 344,000 staying visitors. These figures have significantly changed since the first version of this tourism strategy was prepared in 2003. This is primarily due to the fact that South West Tourism uses a different methodology to Heart of England which has an effect on the overall statistics. However, these are the figures with which all tourism developments are now being planned, and 2001 forms the baseline year.
- 3.2 The significance of the tourism industry to the local economy was highlighted during the Foot & Mouth Crisis of 2001 when the Forest of Dean Forest Park was closed to visitors as well as the local community. The crisis impacted across all sectors of the local economy, shattered the confidence of the local community and left the tourism sector in a fragile state.
- 3.3 Gloucestershire was the 6<sup>th</sup> worst affected County in the Country and the Forest of Dean was the worst affected District in the County. Research by the Heart of England Tourist Board showed that there was a 28% decrease in accommodation bookings and a 33% decrease in visitors to attractions whilst the Foot & Mouth restrictions were in force.
- 3.4 The crisis served to highlight just how important the tourism sector is to the District, not just in economic terms but also for its social and environmental values.

## **4.0 The current state of Tourism in the Forest of Dean**

- 4.1 Prior to Foot and Mouth, tourism had been in decline in the Forest over the previous 10 years. There had been a substantial fall in the number of staying visitors (7%), whilst dependency on day visitors had increased significantly. Employment in tourism had dropped by 16% since 1995 (both direct employment and indirect). However, since the outbreak, there has been a considerable increase in the number of staying visitors and associated visitor spend, while the number of day visitors appears to have decreased slightly. The significant rise in visitor figures experienced in 2002 was likely to be as a result of the Forest being closed for much of the previous year's summer, combined with the amount of publicity received by the Forest which helped to raise awareness of the area.
- 4.2 The new figures show that the tourism industry in the Forest of Dean is performing much better than previously reported. The average spend per staying visitor in the Forest is £39.25. The average spend per day visitor in the Forest is £23.37. (Source: South West Tourism 2002).
- 4.3 The tourism industry is improving and, along with the quality of the natural assets in the Forest of Dean, there has also been an improvement to the man-made facilities and services offered to the visitor. A brand new attraction, the Forest Model Village and Gardens, on the Lydney Park Estate, which opened in 2004 and has been significantly extended and improved in 2005, has boosted the tourism product offer. A new open-top tour bus, the Forest Hopper, launched its new service in 2004 and will continue to operate during the 2005 summer holiday. A new Tourism Development Grant was launched in April 2004. This has been well received by tourism businesses many of whom have used the available funds to help improve the facilities being offered by accommodation and attractions in the Forest.
- 4.4 The structure of the tourism industry has become much stronger over the last few years. The Royal Forest of Dean Tourism Association has a membership of over 150 from across the private tourism sector. A Tourism Task Group has been formed as one of the Local Strategic Partnership's Thematic Groups. This group has a membership of 28 representatives from across the public and private sectors who meet regularly to discuss strategic tourism issues affecting the Forest of Dean, and work towards common goals.
- 4.5 The Forest of Dean District Council includes Tourism as one of its key priorities within its corporate plan and has allocated additional resources to the Tourism Service. This includes money for an additional assistant tourism officer post plus increased spending for marketing and promotional services. In total these additional resources equate to an increase of 68% in the annual tourism budget.

4.6 Although the tourism industry appears to be improving and the quality of the natural tourism assets in the Forest of Dean are excellent, there is still substantial investment to be made in the man-made facilities and services required to support visitors, which are vital if the Forest is to successfully compete as a tourist destination. We cannot expect visitors from the rest of the UK and overseas to visit if there are limited opportunities for eating out and shopping, if quality is questionable, if we can't guarantee the welcome or standard of service visitors may receive.

4.7 There are a number of underlying issues which are still relevant and which need to be addressed to realise the full potential of the tourism sector in the Forest of Dean:

- Uncertainty in defining what the destination actually is\_(what we are offering the visitor) has weakened marketing activity.
- Marginalisation\_ The Forest is located on the margins of the regional organisations who must support this Strategy and the Forest has missed out on support and funding because of this marginalisation.
- Community attitudes & support - both real and perceived give an impression of local opposition to tourism development.
- The tourist 'offer' issues – questionable quality and scale of existing accommodation and attractions. There is arguably too much low-priced serviced accommodation, a dominance of camping and caravanning in the self-catering sector and too few 4\* and 5\* hotels.
- A lack of good quality dining and shopping opportunities within the district.
- Under-Investment by existing operators and the low level of new private sector involvement, all of which impacts on the visitor experience.
- Skills and training issues, which impacts on the visitor experience.
- Sustainability Issues (which are addressed below in detail).

To achieve the objectives of this Strategy these issues will have to be tackled in a Partnership manner and through focused actions.

## **5.0 Our commitment to sustainable Tourism development**

5.1 Development which meets present needs without compromising the ability of future generations to meet their own needs is at the heart of this Strategy. Adopting sustainable development principles will help to improve the visitor experience and enhance their appreciation of our local culture and environment, whilst protecting the quality of the Forest and its surroundings.

### **5.2 Sustainable Development Principles**

- Sustainable development within the Forest environment is central to the Tourism Strategy.
- Local communities and stakeholders should be included in developing and implementing the Tourism Strategy.
- New tourism developments will be restricted to those, which preserve and enhance the character of the landscape and environment in which they sit.
- All tourism development should conserve and enhance a sense of place.
- Where opportunities present, new tourism developments should commit to using local timber, produce, suppliers and labour.
- New development will be determined in accordance with the policies of the adopted Development Plan for the Forest of Dean District. But proposals which are located close to settlements, or which have sustainable transport links will be favoured.
- Sustainable transport options should be encouraged with the aim of reducing traffic in the heart of the Forest.
- Innovative and sympathetic design, which reflects local distinctiveness, should be incorporated into new developments.
- ‘Seasonality’ issues should be addressed.

## 6.0 Our Vision for Tourism in the Forest of Dean

*“To create a vibrant, attractive destination where sustainable tourism businesses can flourish, generate income and provide a range of employment opportunities for local people, thereby ensuring that the distinctive character of the Forest is sustained for the benefit of all who live, work and visit this special place”.*

## 7.0 Aims of the Tourism Strategy

7.1 This Tourism Strategy has 6 Aims which will be at the forefront of determining the future economic, environmental and social well being of tourism in the Forest of Dean District :

- **To increase the number of staying visitors and increase visitor spend per head in the Forest of Dean.**
- **To encourage tourism development within the District in a customer-focused way.**

- **To promote a tourism industry that supports the management and maintenance of our natural environment and our industrial heritage.**
- **To create a climate of confidence for investors within tourism, hospitality and leisure to invest in the Forest of Dean.**
- **To encourage existing businesses to invest and upgrade their product to meet new market demands.**
- **To support tourism policies which maximise the economic benefit of tourism to the local economy.**

## **8.0 Strategic Framework for Activity**

8.1 Following on from the aims of the strategy, there are eight key objectives for the Tourism Strategy which are identified below. In order to achieve these objectives during the five year lifetime of the Tourism Strategy, the Strategy also identifies specific 'action areas' and suggested 'ideas for action'.

### **Objective 1 Accommodation**

'To develop the range, quality and number of accommodation establishments in the area'.

### **Objective 2 Attractions**

'To improve the range and quality of attractions'.

### **Objective 3 Activities**

'To develop the range and quality of activities'.

### **Objective 4 Tourist Information**

'To improve the Tourist Information Service'.

### **Objective 5 Infrastructure For Tourism**

'To improve and develop facilities for visitors'.

### **Objective 6 Skills & Training**

'To develop and promote training opportunities and skills development for those employed in the tourism & hospitality sectors'.

### **Objective 7 Marketing**

'To establish the Forest of Dean as THE outstanding Forest destination in the UK'.

### **Objective 8 Festivals & Events**

'To support the development of a year-round programme of festivals, events and arts activities'.

## **9.0 Relationship to other Plans and Strategies**

9.1 This Strategy has evolved out of the Forest of Dean Tourism Development Potential Study, which drew on the plans and strategies of the Forest of Dean District Council and its partners. A Working Group comprising representatives of Forest of Dean District Council, South West Regional Development Agency, South West Tourism, The Countryside Agency, Forest Enterprise, The Royal Forest of Dean College and the Royal Forest of Dean Tourism Association prepared this Consultation Draft Tourism Strategy, ensuring that individual partner aims and objectives are included within the “Ideas for an Action Plan”.

### **9.2 Statements from Partners**

#### **Forest of Dean District Council**

The overall aim of the Forest of Dean District Council is the economic, social and environmental regeneration of the District. Tourism impacts on all of these areas, through employment, investment and tourism income, through training and professional skills development, through cultural tourism and events, and through regeneration and environmental improvement schemes, which improve and protect the Forest's biggest tourist asset, the natural environment. Tourism touches on nearly all of the Council's services, from environmental health to IT, inward investment to litter collection, cutting across agendas ranging from economic development, the arts to the Local Plan.

#### **South West Regional Development Agency**

Regionally, there is to be a new role for the South West RDA with regards to tourism strategy preparation and their ability to financially support tourism projects. RDA's have been given the lead role in developing regional tourism strategies with regional Tourist Boards as their delivery partners. As such, the close working relationships which have been formed in developing this Tourism Strategy for the Forest of Dean will continue in developing and delivering a ten year Tourism Strategy for the South West of England.

#### **The Countryside Agency**

The Countryside Agency is a statutory body with three main aims for the countryside :

- To conserve and enhance England's countryside
- To spread social and economic opportunity for the people who live there.
- To help everyone, wherever they live and whatever their background, to enjoy the countryside and share in this priceless national asset.

The Agency acts as a rural champion, advising government and other decision makers, as well as implementing a limited number of key

initiatives in the countryside such as the Forest of Dean Integrated Rural Development Programme. In all cases, the Agency places a strong emphasis on partnership and sustainable development which are the cornerstones of this Tourism Strategy.

### **Forestry Commission / Forest Enterprise**

Management of Forestry Commission woodlands is highly compatible with tourism – a fact recognised in the designation of the Dean as England's first State Forest Park back in 1938. The woodlands are managed for a number of purposes including rural development particularly through the production of timber, for conservation including the maintenance of biodiversity and the protection of archaeological features, and for recreation and tourism with open access on foot throughout. These objectives ensure the maintenance of a healthy and productive forest environment which is the core on which a thriving tourism industry can be based.

### **South West Tourism**

As the Regional Tourist Board for the South West of England, South West Tourism has a role to :

- Generate new and repeat customers through professionally researched and executed marketing campaigns.
- Steer the development of tourism in the region through key strategic development projects.
- Represent and lobby for a fair economic and public policy position which will enable the industry to develop and grow.
- Save tourism businesses money through membership benefits, discounted purchasing and cost saving opportunities and high quality support services.
- Provide high quality relevant business support services to tourism operators.
- Act as the industry led body and the voice of tourism in the region.
- Help the sustainable development of a profitable and growing quality tourism industry.

In the past links have been established with both the Heart of England Tourist Board and South West Tourism. With effect from 1 April 2004, the Forest of Dean and the rest of Gloucestershire come under the remit of South West Tourism and the South West RDA. Currently undergoing a major strategic consultation exercise – Towards 2015, South West Tourism has proposed a number of marketing initiatives aimed at developing and promoting the customer experience. These involve the development of 'brand clusters' which are based on the top experiences of customers for example 'close to nature' or 'history and heritage'. Their strategy consists of three key aims, namely: driving up quality; delivering truly sustainable tourism; and creating superior destination management partnerships (DMP's). With regard to the latter, South West Tourism have suggested two DMP's for Gloucestershire: Gloucester and the Forest of Dean; Cheltenham and

the Cotswolds. Discussion on the full implications of this is currently taking place with all parties.

### **Gloucestershire Tourism**

Gloucestershire Tourism plays a strategic role in tourism development and undertakes the key role of promoting the County overseas. The implementation of current proposals will see Gloucestershire Tourism move from Gloucestershire County Council into Gloucestershire First – the Sub Regional Partnership of the South West of England Regional Development Agency. This move will strengthen the South West regional dimension to tourism development in Gloucestershire, and create greater opportunities for the promotion of Gloucestershire as a tourist destination nationally.

### **The Royal Forest of Dean College**

The Royal Forest of Dean College (RFDC) no longer holds its status of a “Centre of Vocational Excellence”, which represents a real loss to tourism and hospitality training within the district. However the RFDC plays a key role in developing and delivering training for businesses and individuals. This relates to those currently working in tourism and related areas, those seeking to start new businesses and those looking to join the tourism industry for the first time. A new initiative called Rural Connections has recently been launched by the College which offers free tourism and hospitality training to small and medium-sized businesses within the district.

### **Royal Forest of Dean Tourism Association**

The role of the Association is to encourage and stimulate interest in Tourism in the Forest of Dean and in doing so to foster public understanding and appreciation of the benefits of Tourism within the District.

## **10.0 Implementing the Strategy**

### **The future role of the Tourism Task Group.**

- 10.1 Fulfilling its ‘community leadership’ role the Forest of Dean District Council will be a driving force in implementing the Tourism Strategy. However, we will only be able to deliver this Tourism Strategy through a partnership approach. To deliver lasting and beneficial change the Council and its partners, including the South West of England Regional Development Agency, The Countryside Agency, Forest Enterprise, South West Tourism, and the Forest of Dean Tourism Association will have to explore resourcing opportunities to support the level of tourism activity which will be required to achieve our vision for the Forest of Dean. The engagement and involvement of the private sector and the support of the local community will also be crucial if the objectives of the Tourism Strategy are to be achieved.

10.2 To take the Strategy forward, a formalised 'Tourism Task Group', with a broad membership and direct linkage into the Forest of Dean Partnership (the Local Strategic Partnership), has been formed. This Task Group is the key body for implementing the Tourism Strategy and Action Plan, and 'championing' future tourism development in the Forest of Dean district.

## **11.0 Monitoring & Review.**

11.1 It will be necessary to undertake monitoring of progress towards the Strategy's stated objectives. The progress of 'Actions' should be the basis for discussion with all partners to the Strategy, ideally through the Tourism Task Group, and will be a feature of the annual review of the Strategy.

11.2 The Strategy's Action Plan will identify the lead agencies for implementing 'Actions', the priority of each Action and the monitoring measure which will enable progress to be recorded, and any necessary remedial action to be initiated.

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