

Forestry England Board Meeting Agenda

10 December 2019 2.30-5.00pm

Haldon Forest

Attendees

Forestry England Board: **Ian Gambles (by phone), Julia Grant, Tristram Hilborn, David Hodson, Peter Latham, Jennie Price, Gurch Randhawa, Mike Seddon, Sir Harry Studholme (Chair)**

Apologies:

In attendance: Jose Lavelle (Item 6), Hayley Skipper (Item 6) , Katy David (Item 6)

Secretariat: Rachel Mackintosh

NO. / TIME mins	Start time	ITEM (Materials)	OUTCOME REQUIRED	LEAD
Welcome				
		Chair's Welcome		
1. 10 mins	2.30	Declarations of Interest Approval of minutes and matters arising	Approval	Chair
Ongoing Management				
		CEO report		
2. 30 mins	2.40	Including: Business Area updates Health & Safety report Risk report	Discussion & note	Mike Seddon
3. 20 mins	3.10	Performance Report Focus on: Superb Forests	Discussion & note	Tristram Hilborn
4. 20 mins	3.30	Director of Finance Report (in year to Nov 2019)	Discussion & note	David Hodson
Items for Approval				
5. 20 mins	3.50	Draft Business Plans 2020-25	Discussion	David Hodson Tristram Hilborn
6. 40 mins	4.10	Audience Segmentation and Implementation	Discussion	Jose Lavelle Hayley Skipper Katy David



Concluding items				
7. 5 mins	4.50	AOB		Chair
Future meetings:				
13th February 2020		National Office, Bristol		
22nd April 2020		North District (with 2 overnights 21 -23 April)		
4th June 2020		Bristol tbc		

Papers:

- Item 1: Forestry England Board Minutes 25.9.19 with action log
- Item 2: 2.1 CEO report December 2019
- Item 3: 3.1 Forestry England Scorecard for December 2019
- Item 4: 4.1 Forestry England Finance Report to November 2019
- Item 5: 5.1 Forestry England Board paper _ Draft Business Plans 2020-25
- Item 6: 6.1 Forestry England Board paper _ Audience Segmentation and its implementation

Forestry England board meeting minutes

10 December 2019 2.30 - 5pm

Large Meeting room, Haldon Forest Park

Attendees

Forestry England Board: Ian Gambles, Julia Grant, Tristram Hilborn, David Hodson, Peter Latham, Jennie Price, Gurch Randhawa, Mike Seddon, Sir Harry Studholme (Chair)

Attendees: Jose Lavelle (part), Hayley Skipper (part), Katy David (part)

Secretariat: Rachel Mackintosh

Agenda topics

1. Welcome

| Item Lead: Harry Studholme

The Chair welcomed members to the fourth meeting of the Forestry England board and Tristram Hilborn to his first meeting.

Chair updated that the appointment of a new Forestry Commission Chair was held up due to the general election. As a contingency and if the need arises Jennie Price has agreed to be interim Chair of the Forestry England Board.

Declarations of Interest

No additional declarations made (to those already declared in the Register of Interests). It was agreed to have the register circulated at each meeting.

Approval of 25.9.19 Board minutes

Minutes approved.

Matters arising, not appearing elsewhere in the agenda:

- Linking with inter-faith communities. Sir Harry has discussed with Bishop of Salisbury who has expressed interest but has not pushed this further yet. Gurch has met with the EcoSikh and Sikhs Go Green. He recommended they would be good communities to engage with, but first as an organisation Forestry England we needed to be clear why we wanted these groups in the forests and why we were engaging with them. He has contact details for this to be taken forward. Action to be updated.

Action Items	Person responsible	Deadline
Circulate Register of Interests with meeting papers	Rachel Mackintosh	Each meeting
Update action on linking with interfaith communities	Rachel Mackintosh	13.02.20



2. CEO report

| Item Lead: Mike Seddon

Mike highlighted the following points in the CEO's report:

- Following previous Board discussions work to refresh KPIs is launching. A thought paper will be sent out next week to the Board to capture initial views to be incorporated into developing the proposal. Board members are invited to respond to the paper to John Stride.
- Manifesto aspirations. A team are scenario planning for the various outcomes.
- Ash resilience. Future Trees Trust, FR and Forestry England have agreed an area in our South District can be planted with various ash clones for testing resilience.
- Construction. Delamere Forest Centre development on track. The Camping in the Forest development at Sherwood is due to complete in June; this is the first development since CITF were formed.
- Legacies. Some initial work was being done, and ET had agreed to explore this starting with clarity of messaging about this initiative for internal audiences.
- Spike in hunting correspondence related to one trail hunting incident.

The following were issues were also discussed:

- Volunteering. Would like a sense of volunteering numbers, and consider how we reflect on this in KPIs, strategies etc.
- Land acquisition. It was noted that the Thetford transaction included new land, in addition to a transfer of existing land from leasehold to freehold.
- An update on the irrigation project at Delamere was requested.

The non-executives provided updates on their engagement with the nation's forests since September.

Jennie:

- Has been to Bedgebury a couple of times on her own really impressed with staff and volunteers.
- Is sitting on the Natural England interview panel for new non-executives, and has the opportunity strengthen the connection between the organisations, which was generally welcomed.

Peter: Has held separate meetings with CONFOR and Grown in Britain.

Harry: Planting Centenary trees, including in Haldon for Tree Planting week.

Health & Safety report

Tristram presented the health and safety report. Issues discussed were the use of the near-miss figures to take proactive action and the increase in the category 'being hit by a fixed object'. The work of the HSTT team in developing staff training in response to these reports was noted.

Non-executives asked for information on our messaging to the public to manage risk from the expedient rise in Lyme's disease arising from tick bites.

Risk report

The new ARAC shared with Forest Services had met recently.

Julia, Chair of ARAC, gave a quick update focusing on:

- Internal audit - particularly the recent procurement audit report on which a management response is being prepared
- Disaster Recovery plans which were progressing well
- Risk register, particularly fire, wind, reservoirs, and how climate change is reflected in risk register.

Action Items	Person responsible	Deadline
Board members to consider paper on KPIs once received and send response to John Stride.	Non-executives	17.01.20
Latest volunteering figures to be circulated to the Board	Mike Seddon	13.02.20
Provide an update on whether issues with EA about water abstraction had been resolved at Delamere.	Tristram Hilborn	13.02.20
Provide information on the information we provide to the public on ticks and Lyme's Disease.	Tristram Hilborn	13.02.20

3. Performance Reporting Development

Tristram presented the performance indicators, with a deep dive into the superb forests objective. The following discussion covered:

- The loss of items in the NCA figures is a result of a change in how data is reported rather than an actual loss of items.
- The pipeline of acquisitions was welcomed, but it was requested that the figures were presented in the simplest comparable format, for example identifying separately where the acquisition included a change in title or purchase of buildings.

Action Items	Person responsible	Deadline
Land acquisition table to be refined to clearly reflect type of acquisition	Tristram Hilborn	13.02.20

4. Director of Finance Report

| Item Lead: David Hodson

David presented the financial report where the position for income against budget was good, but the forecast is currently worse than planned, although this could be corrected in the final quarter. The discussion that followed considered reasons for the current forecast, including external and cultural factors, and the steps being taken to check the robustness of the forecasts. The Board were informed that a new head of Management Accounting has been appointed who would support this process.



5. Draft Business Plan 2020-2025

Item Lead: Tristram Hilborn / David Hodson

Tristram and David provided an overview of the five year business planning process. Known risks to the plan were identified, including uncertain spending review impacts, timber market and Offer 2020, mitigated by retaining a cash reserve. The discussion focused on:

- The ongoing feasibility of the bottom up planning approach against the backdrop of realising manifesto pledges at a national level
- The planning going into meeting those manifesto pledges, and the impact any capital investment will have on ongoing spend, potentially raising the baseline of operating costs that needed to be factored in.
- Openness of the assumptions and problems identified and the assurance process for the Plan.

The Plan will come to the Board for approval in the February meeting.

6. Audience Segmentation and implementation

Item Lead: Jose Lavelle, Hayley Skipper, Katy David

The presentation covered the information identified about our customers, the audience segmentation process, and how this has been implemented in the recreation offer.

The non-executives noted the range of audiences being served and diverse set of business reasons for engagement. Greater clarity of purpose for engagement was felt to be important. The overall discussion considered the complex balancing of operating as a commercial organisation against the obligation in managing a public asset to make it universally accessible, and how that determined the strategies for audience engagement.

AOB

Dates requested for the next year of meetings.

The Board thanked Sir Harry for all his work for Forestry England as Chair of the Board as this was potentially his last meeting.

Action Items	Person responsible	Deadline
Meeting dates for the next year to be put in diaries	Rachel Mackintosh	13.02.20

Tristram Hilborn
 Chair
 9th March 2020



Paper Title: CEO Report

Under the freedom of information act 2000, exempt information this paper has been withheld from publication as per Section 43(2): Prejudice to commercial interests.

**If you wish to request this paper please contact Rachel Mackintosh at;
Rachel.mackintosh@forestryengland.uk**

Forestry England Performance Scorecard

Forestry England Board - December 2019

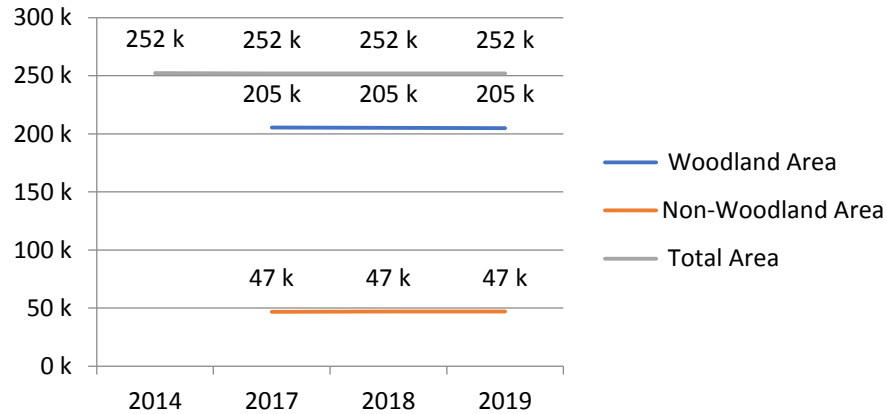
Tristram Hilborn - Chief Operating Officer



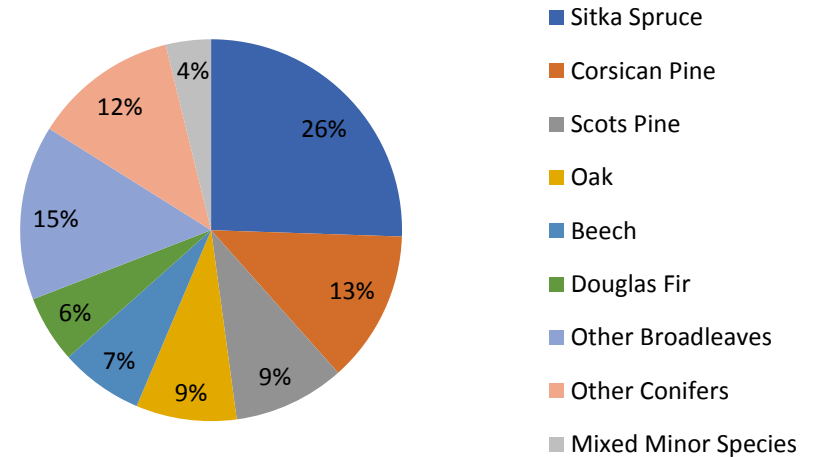


The Nation's forests are at the forefront of contemporary Worldwide forestry management

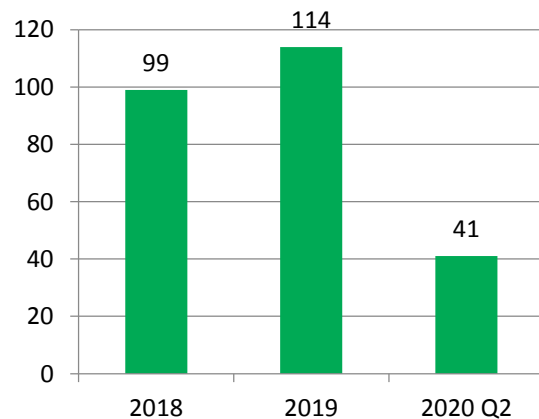
Woodland Area and Size of Estate (Ha)¹



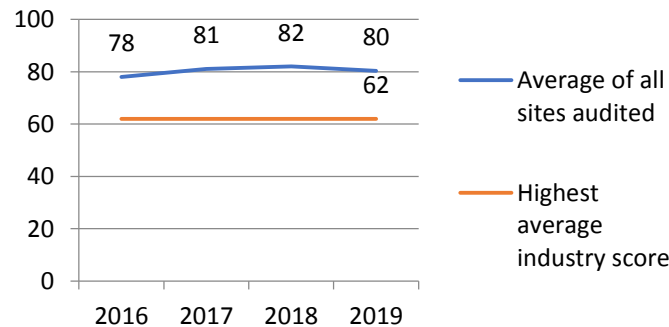
Tree Species Diversity³



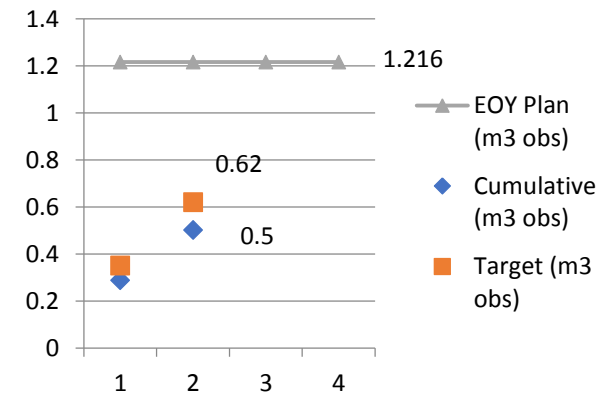
Number of volunteer work years by year



Visitor Experience - Net Promoter Score - 3 Year Average of all sites



Timber Production (millions m³)



1. Woodland area will include some temporary and small-scale permanent open space within UKFS guidelines
2. 1 work year = 249.5 work days. 1 Work day = 7.4 hours
3. As % of woodland area

Woodland area - Annual measure - not updated.

Tree species - Annual measure - not updated.

Volunteers - Provisionally updated to 2019-20 Q2. Up from 33 this time last year.

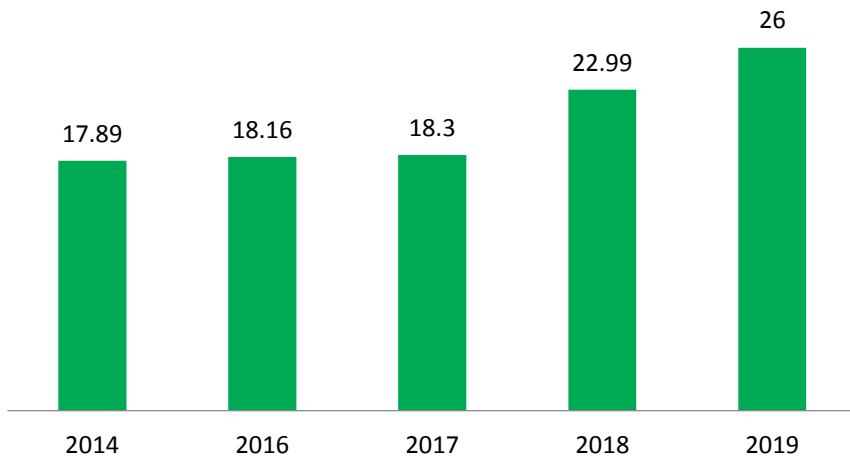
Net Promotor Score - Changed to show 3 year average so each point represents the average score of all hub sites (but not yet updated for 2019)

Timber - Updated to 2019-20 Q2

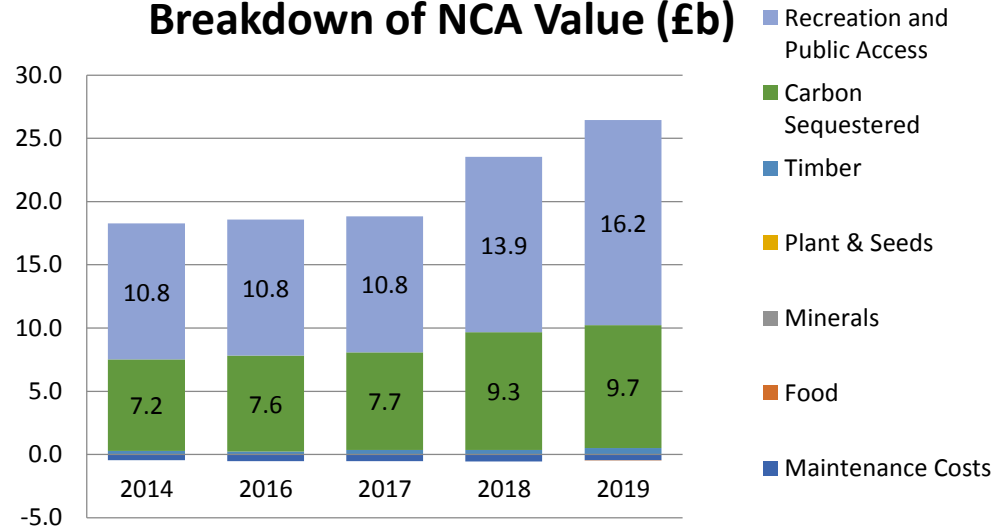
Increasing Natural Capital

The Nation's Forests' natural capital value is increasing

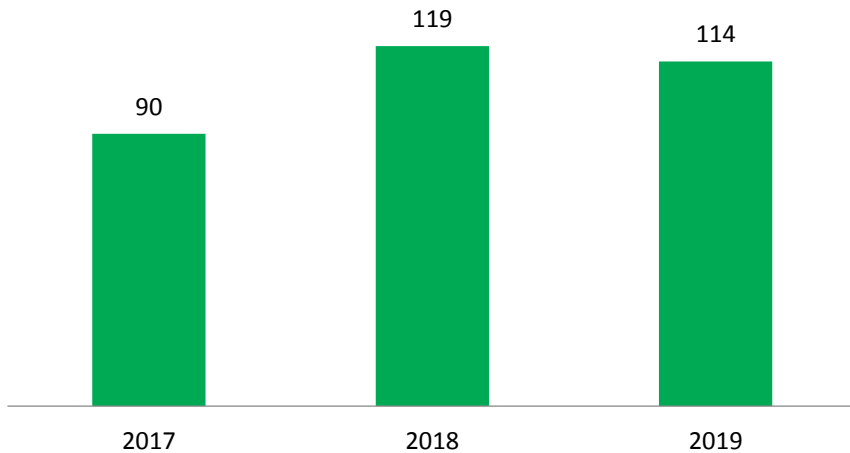
Adjusted NCA Value¹ (£b)



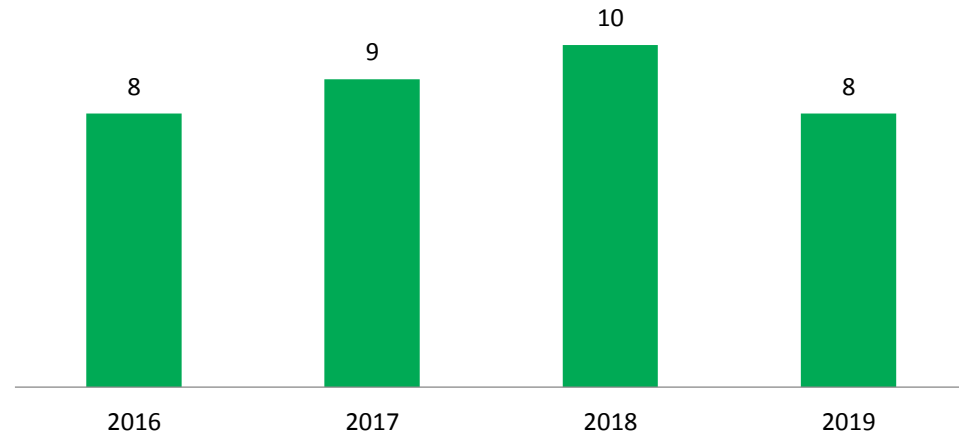
Breakdown of NCA Value (£b)



Number of Items in Natural Capital Account Asset Register²



Number of Items in Natural Capital Account Monetary Flow Account

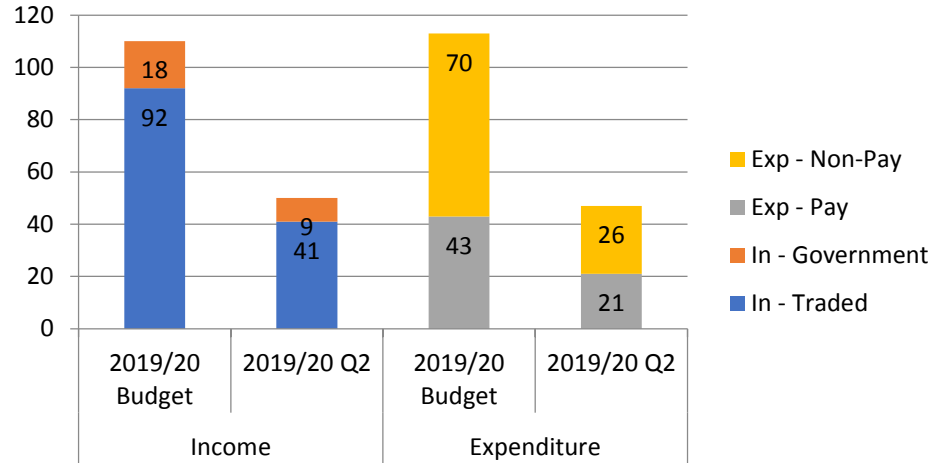


1. NC value increase largely results from developing NCA methodology as opposed to changes to forest management practices.
2. No comparable Asset Register prior to 2016/17
 - Not updated since last scorecard

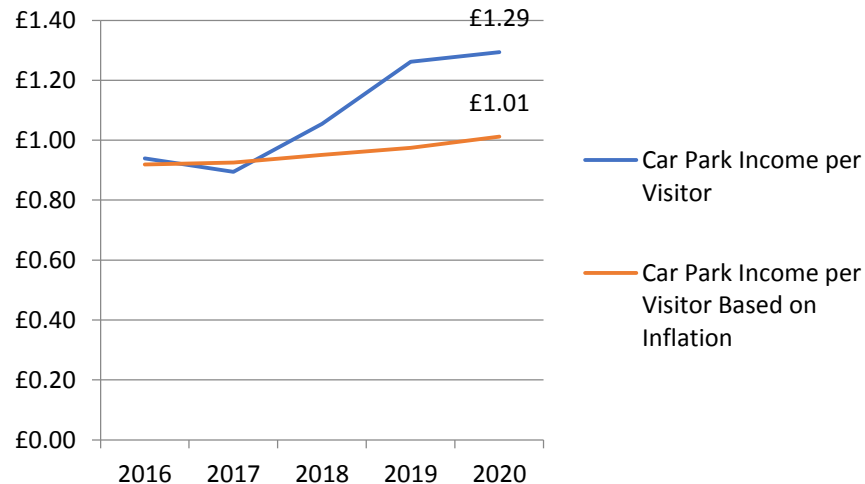
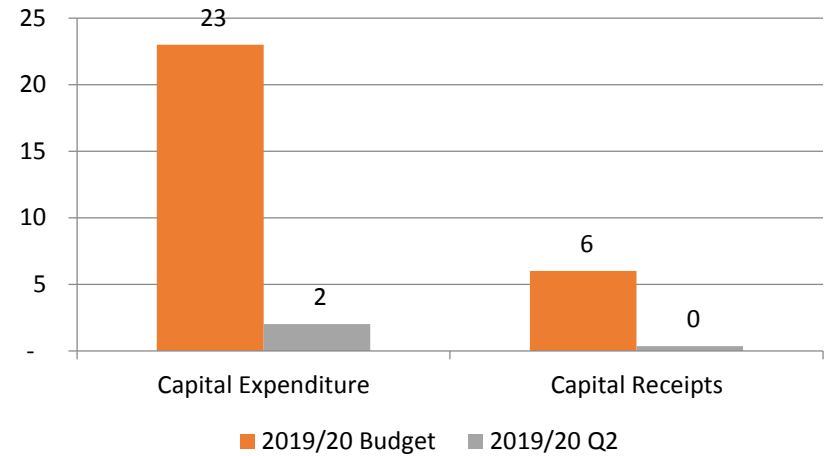


The Nation's forest estate is financially sustainable, standing on its own feet

Income & Expenditure (£m)



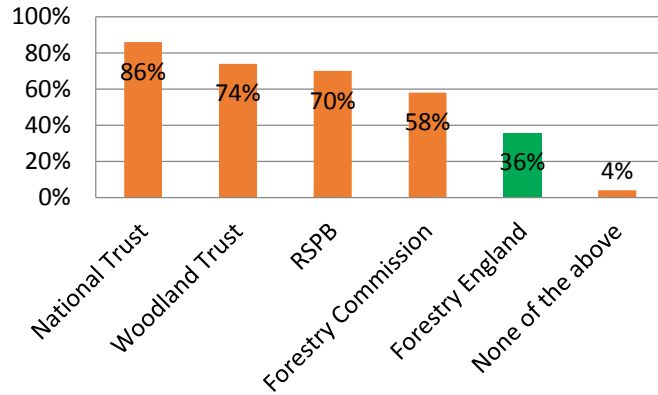
Capital Investment (£m)



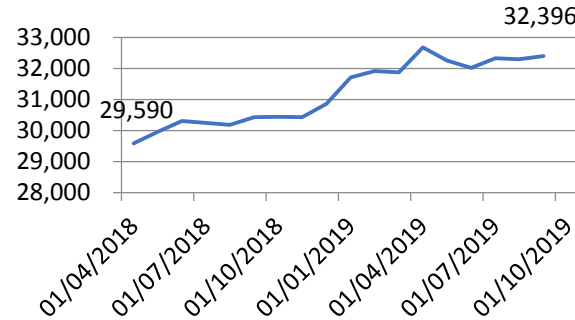
All Updated for Q2

What we do has a positive influence beyond the Nation's forests and is recognised as being first class

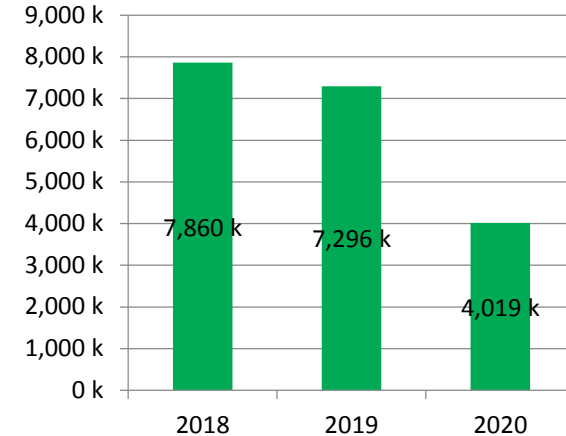
Brand Awareness of Leading Land Managers¹



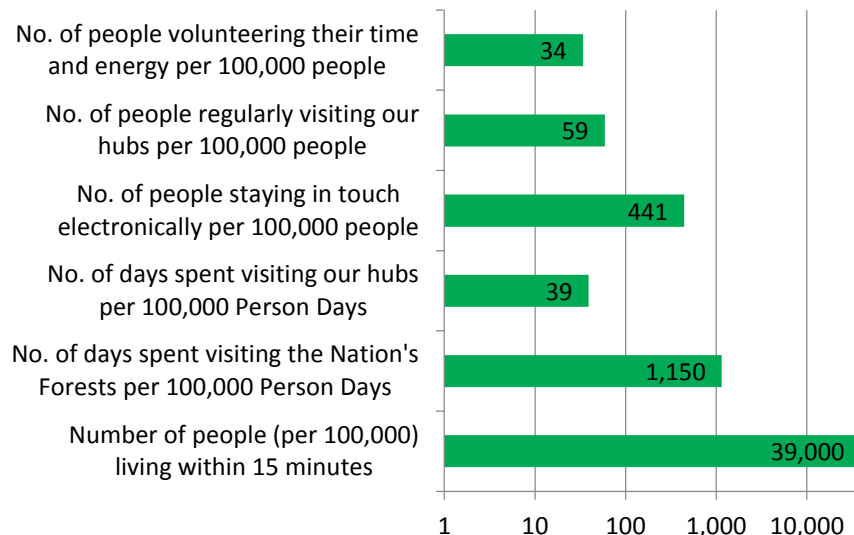
Supporter Loyalty- Discovery Pass Membership



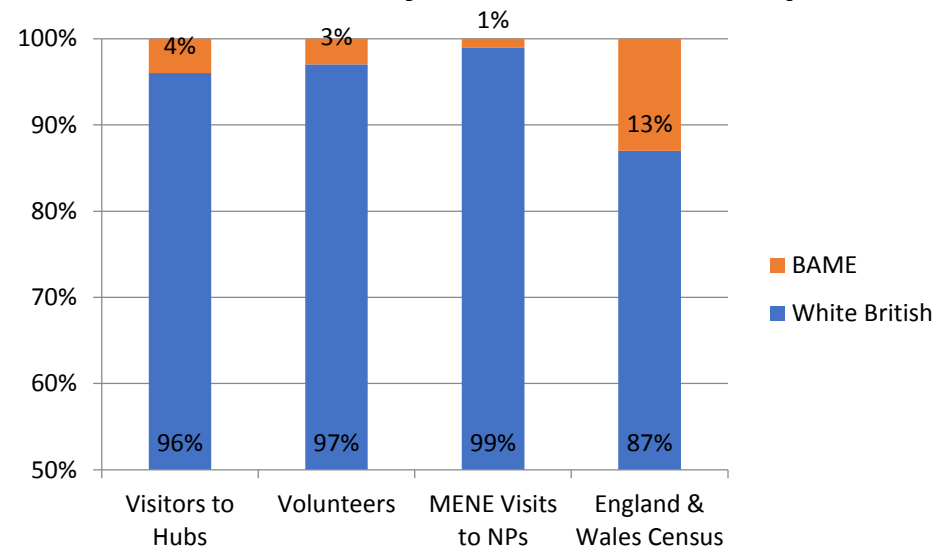
Visits to main hubs



Connection Choices



Ethnic Diversity of Connected People



1. Survey summer 2019

Brand Awareness - Updated for Q2

Supporter Loyalty - Updated for Q2

Visits to Main Hubs - Updated for Q2.

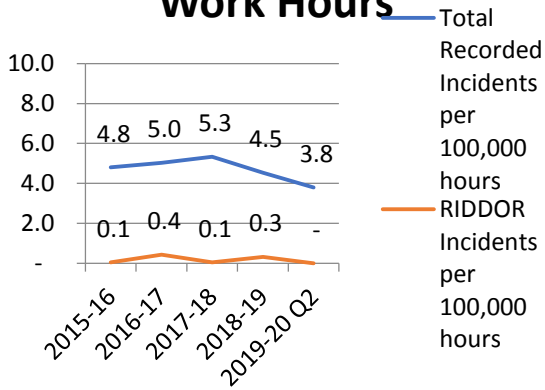
Connection Choices -Annual - not updated

Ethnic Diversity of visitors - Annual - not updated

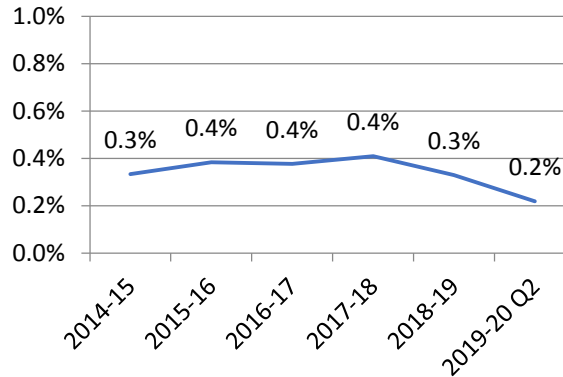
Being an outstanding organisation

We are excellently led, motivated and skilled people.
We are supported to deliver and act with integrity.

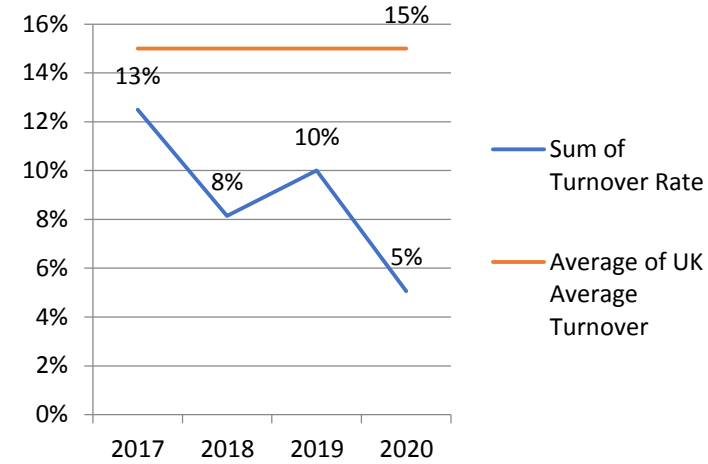
Staff Safety - Accident Rate per 100,000 Work Hours



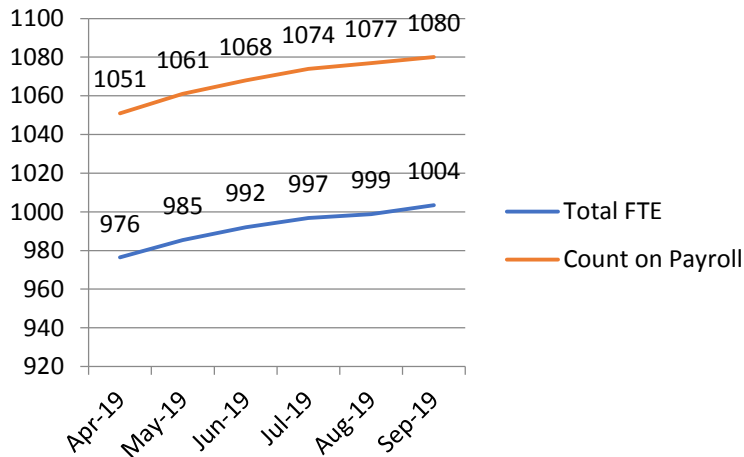
Public Safety (Rate of reported incidents per total annual visits)



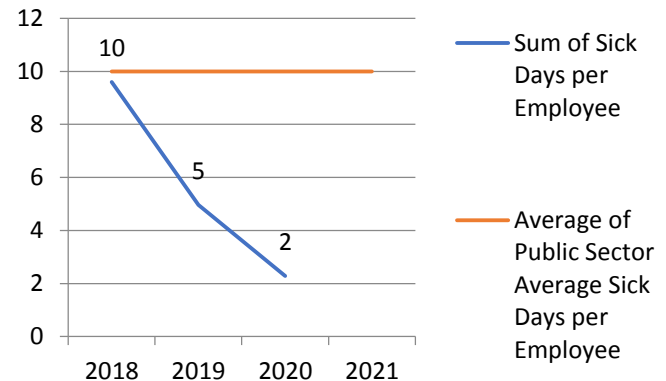
Staff Turnover Rate



Staff Head Count



Staff Absence (average accumulated absence per employee)



Staff Safety - Updated for Q2

Public Safety - Updated for Q2

Staff Turnover Rate - Updated for Q2

Staff Head Count - Updated for Q2

Staff Absence - Updated for Q2

- Current Vacant Posts - iTrent still unable to produce this figure - HR working with finance to align data which will allow development of this measure (removed from scorecard for now)

Forestry England Performance Scorecard

Focus Discussion: Superb Forests

Tristram Hilborn - Chief Operating officer



There is currently a project underway as part of the Improvement Plan to define ‘Superb Forests’.

In order to have made progress, the existing scorecard and this discussion on Superb Forests presents measures related to the over-arching concept that superb forests are sustainable, resilient and valued.

This focussed discussion aims to illustrate to the Board the complexity of Superb Forests and bring to attention the thought processes underway to identify clear strategic measures for performance delivery.

Superb Forests

	Valuable for nature	Valuable for people
Where we are	UKWAS certificated forests held in trust for the nation with a total calculated natural capital value into perpetuity of £26b, estimated to be enjoyed more than 200 million times each year.	
Where we want to go	<u>Forests which are resilient and sustainable. They are:</u> <ul style="list-style-type: none"> • Growing in extent • increasingly connected • increasingly diverse • improving in condition 	<u>Forests to which:</u> <ul style="list-style-type: none"> • More people are connected (physically, culturally and economically) • There are more ways for people to connect • People value their connection more • Connected people reflect society
What we currently measure	<ul style="list-style-type: none"> • Size of the estate • (nothing as yet) • Canopy species diversity • Protected site (SSSI) and priority habitat condition 	<ul style="list-style-type: none"> • Quantitative connection choices (telling our story) • Visitor experience net promoter score • Ethnic diversity of connected people (telling our story)
	Plus annual UKWAS audit as well as all measures within the annual Natural Capital Account.	
Planned activity over the next 15 months	Widespread understanding across Forestry England of the objective and how it supports delivery of our purpose <ul style="list-style-type: none"> • Land acquisition. Strategy reflects need to increase value for nature and for people • Exploration of landscape connectivity measures • Ongoing diversification of planted species • Confirmed approach to SSSI and other priority habitat condition assessment • Diversity strategy and recreation approach aims to increase extent and diversity of connection opportunities • Exploration of improved qualitative experience value measure (e.g. customer satisfaction) • Building catchment-based approach integrated into forest planning • Expanding ecosystem services reflected in the NCA 	
How do we know we are succeeding?	<ul style="list-style-type: none"> • The total (Doing things better) calculated natural capital value is increasing, through expansion of the estate and refinement of methodologies of natural capital accounting. (see Increasing Natural Capital Slide) • UKWAS certification is maintained • Forest resilience is increasing (see slide 12 for example measures for extent and diversity) • Societal demographic is reflected in our supporter demographic (see Telling our Story slide) • Quality of experience is improved (currently measured as Net Promotor Value) 	

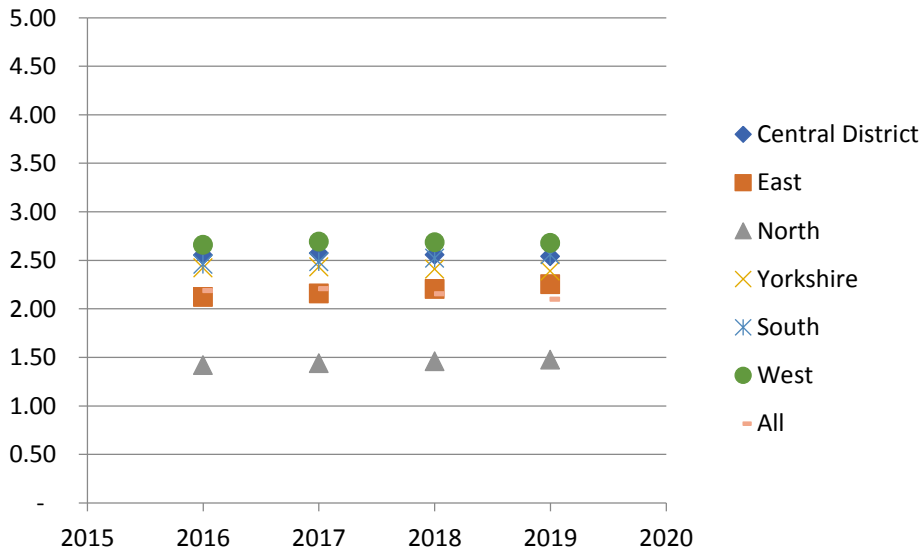
Some of the proposed measures of success (in red) identified above are annual measures and may well work at an organisational KPI level.

Therefore, this discussion should note that while these measures may help us to know that we are achieving Superb Forests in the long-term (i.e. fulfilling our purpose of ensuring the nation's forests' value to society and the environment is increasing), identifying specific medium-term outcomes for our strategic objectives would likely help us to identify measures more appropriate to that timescale.

Superb Forests - Extent and Diversity

	Exploring	Negotiating	Purchasing	Secured	Totals	Increase in Size of Estate
Number of Sites	2	2	4	2	10	
Total Area (Ha)	223	47	2730	72	3072	1%
Total Cost (£)	£ -	£ 750,000.00	£ 8,333,000.00	£ 2,370,000.00	£ 11,453,000.00	
Average £/ha	£ -	£ 15,957.45	£ 3,051.97	£ 33,035.96	£ 3,728.06	

The table above shows the pipeline of land acquisitions during this financial year, from exploratory discussions to completed purchase. While useful to see the varying cost per hectare and the overall impact on the size of the estate (increased by 1% if all are successful) this does not account for the added natural capital value or overall resilience of the estate gained as a result of these acquisitions.



This graph shows the Shannon Index of tree species diversity across the nation's forests.

The Shannon Index is a widely used method of expressing species diversity within communities. The Index uses a scale from 0 (not diverse) to 5 (very diverse).

While useful to see that overall the nation's forests are moderately diverse (an average score of 2.1) with regards to tree species, there is a variation across Forest Districts.

Species diversity and habitat extent are important components of resilient forests. However, it must be remembered that other components such as connectivity and condition are equally as important. We are exploring measures for connectivity with Forest Research. Condition could be pulled through from our periodic SSSI and Priority Habitat Condition Assessments.

The above slide presents 2 potential measures to support the Superb Forests strategic objective. They show measures which are best applied at different levels for the benefit of this discussion.

- Pipeline of acquisitions may be more of a strategic, medium-term measure. Overall size of the estate may be the related overarching KPI.
- Shannon Index may be the overarching KPI whereas diversity of planted species (perhaps showing a pipeline from planned>grown>planted>established) might be a useful medium term strategic measure.



Paper Title: Finance Report

Under the Freedom of Information Act 2000, this paper has been withheld from publication as per Section 43(2): Prejudice to commercial interests.

**If you wish to request this paper please contact Rachel Mackintosh at
Rachel.mackintosh@forestryengland.uk**



Paper Title: Business Plan

Under the Freedom of Information Act 2000, this paper has been withheld from publication as per Section 43(2): Prejudice to commercial interests.

**If you wish to request this paper please contact Rachel Mackintosh at
Rachel.mackintosh@forestryengland.uk**

BOARD PAPER

Paper Title: Recreation Audience Insight

Author/Presenter: Katy David, Head of Marketing & Supporter Development

Josephine Lavelle, Director of Marketing & Engagement

Hayley Skipper, Director of Operations - Commercial Visitor Development

Paper Requirement:

Decision Required	For Approval	Information Only	Official/Commercial Sensitive
		X	

Summary of key points and action required by Board

- Forestry England has a rolling programme of insight to monitor visitor experience and benchmark the visitor profile of our existing audiences.
- Forestry England's segmentation was developed to identify our most valuable existing and potential visitors and provide us with the insight to target them effectively.
- We are currently integrating the segmentation into Forest Centre business planning so that future plans are based on audience insight.
- **Action:** We will be reviewing visitor insight in 2019 and are interested to hear the Board's thoughts on what else you would like us to know about our audiences?

Core messages for the non-executives to promote

- 81% of our visitors have visited before.
- 49% of our visitors visit in family groups.
- 88% of our visitors report that they had an excellent or very good experience.
- 73/100 would recommend us to a friend (Net Promoter Score).
- Our visitors spend on average of 2 hours 26 minutes per visit at our forests.

Content

1. What we know about our recreation audiences

1.1 Visitor data and overview of existing audiences

Quality of Visitor Experience Survey

Since 2013 we have carried out the Quality of Visitor Experience survey at our key forest centres. The surveys are conducted on a rolling cycle across 22 sites, with each site

Recreation Audience Insight

being surveyed once every three years. An annual national review is also produced. As well as informing us of visitors' perceptions of the site and allowing us to benchmark the quality of their experience, it reports on the visitor profile at our forest centres. From the 2018 national report we know¹:

- Nearly half our visitors are families (49%)
- 68% are ABC1 and 75% are in employment
- 97% are White British or Irish
- 6% have a limiting illness
- 51% of visitors are aged 35-54 years, 29% 55 years+
- Of 81% of visitors who have visited before, 54% visit at least monthly
- 88% state they had an excellent or very good experience
- 73/100 would recommend to a friend (Net Promoter Score)
- Visitors spend on average 2 hours 26 minutes per visit at our forests
- On average they spend £21.07 on-site and £35.82 in the local area

VAQAS

Sites are independently assessed annually via Visit England's Quality Assessment Scheme (VAQAS). Each year 21 sites are mystery shopped by Visit England's team of assessors and given a quality score for their visitor experience, as well as guidance on improvements. In 2017 and 2018 the average overall quality score for our sites was 81%.²

Sources of additional audience insight

Additional information is regularly collated and reviewed to provide a deeper understanding of our audiences. This ranges from surveys to our members and Mosaic postcode analysis, to reviewing social media and website audience data and working with partner's insight teams, such as Sport England. Where possible we aim to align this to our segmentation.

1.2 Segmentation

The Recreation audience segmentation was developed in 2018. With 80% (35 million)³ of the adult population of England part of the potential outdoor days out market, we needed to understand who our most valuable audiences could be and prioritise targeting these groups.

Our segmentation is bespoke to Forestry England and based on evidence⁴. The model has been developed based on the behaviours and attitudes of existing and potential customers. The six segments created can be found in *Appendix 1: Market Segmentation Summary*.

¹ Beaufort Research: Quality of Visitor Experience Report 2018 - All England

² Visit England's Quality Assessment Scheme Reports for Forestry England Forest Centres, 2017 & 2018

³ RDSi Research, April 2018

⁴ RDSi Research surveyed over 2,500 existing and potential visitors (including members) and reviewed historical research

Recreation Audience Insight

The segmentation tells us information such as:

- Who currently visits Forestry England forests and visitor centres
- Who spends the most money on site
- What motivates them to visit
- How satisfied they are
- What their awareness and knowledge of Forestry England is
- What their potential lifetime value is
- How we reach them effectively

2. Using this insight

2.1 Recreation Marketing Strategy

The Recreation Marketing Strategy for 2020-2023 has been developed based on the segmentation and will focus resource on appealing to our most valuable off-peak audiences, Easy Pacers and Den Builders, while building higher engagement with Activity Hunters.

2.2 Review of visitor insight

In 2020 we plan to review our visitor insight provision to provide Forest Centres with more regular, actionable data on their existing visitors. This will allow sites to make continuous improvements to their visitor experience based on feedback.

2.3 Forest Centre Business Plans

The revised visitor survey will aim to incorporate our segmentation golden questions to ensure all sites have an understanding of their current visitor segments and can develop Forest Centre business plans on this insight. This will ensure they can benchmark growth of targeted segments, make relevant investments for their most profitable audiences and develop effective local marketing plans.

2.4 Diversity and Inclusion

Unconscious bias within language and images used in marketing material can exclude individuals and communities if they are not relatable. We aim to be more effective in developing connections and life-long relationships between the Nation's Forests and England's diverse communities through effective, relevant communication, as shown by our refreshed Forestry England website, coupled with targeted new audience development projects.

3. What else do we need to know?

As part of the visitor insight review we are keen to understand what else you would like us to know about our existing or potential audiences. Where are the gaps that we should be investigating? And how could we use the data we have further?

Recreation Audience Insight

Katy David, Josephine Lavelle and Hayley Skipper
Recreation Audience Insight
November 2019

Our recreation audience

Josephine Lavelle

Director of Marketing and Engagement

Katy David

Head of Marketing and Supporter Development

Hayley Skipper

Director of Operations- Commercial Visitor Development



We will be reviewing visitor insight in 2020.

We are interested to hear your thoughts on what else you would like us to know about our audiences?

- Data sets
- Our existing audience
- Our potential audience
- How we apply this in practice

Current Visitors

- Quality of Visitor Experience Survey (06-18)
- VAQAS (Visit England Quality Assurance Scheme)
- Social: Facebook / Twitter
- Website
- Membership and Forest Live surveys
- Previously: Mosaic Profiling

Existing and Potential Visitors

- RDSi Forestry England Recreation Audience Segmentation

First time v visitors who had visited before



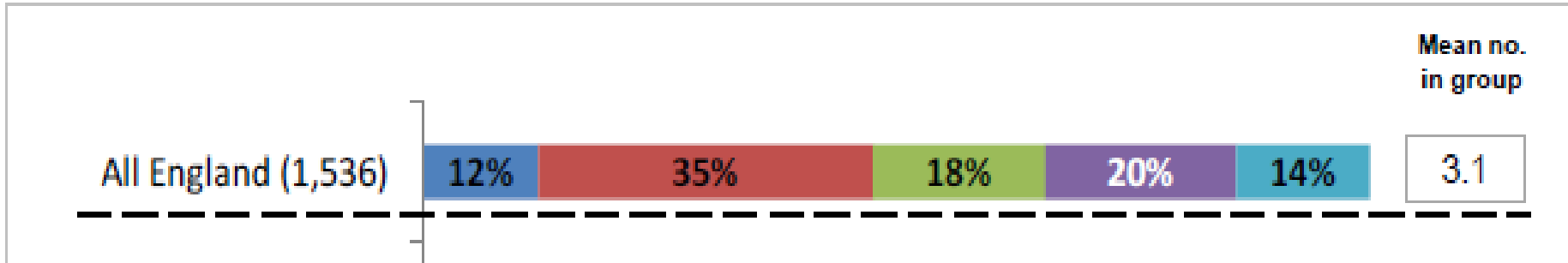
Frequency of visits (of the 81%)



Bases in brackets – repeat visitors

- NB:**
- Weekly = Every day, 4-6 times a week and 1-3 times a week
 - Monthly = 1-3 times a month
 - Yearly = 4-6 times a year and 1-3 times a year

Figure 1: Q1. Total size of the group



- People were more likely to visit as a pair - 35%
- Larger groups (four or more) made up 34%
- 12% of people came to forests alone in 2018

Why do people visit?

35% mentioned
walks/paths/trails

32% mentioned scenery
and beautiful views

26% liked peace and
tranquillity

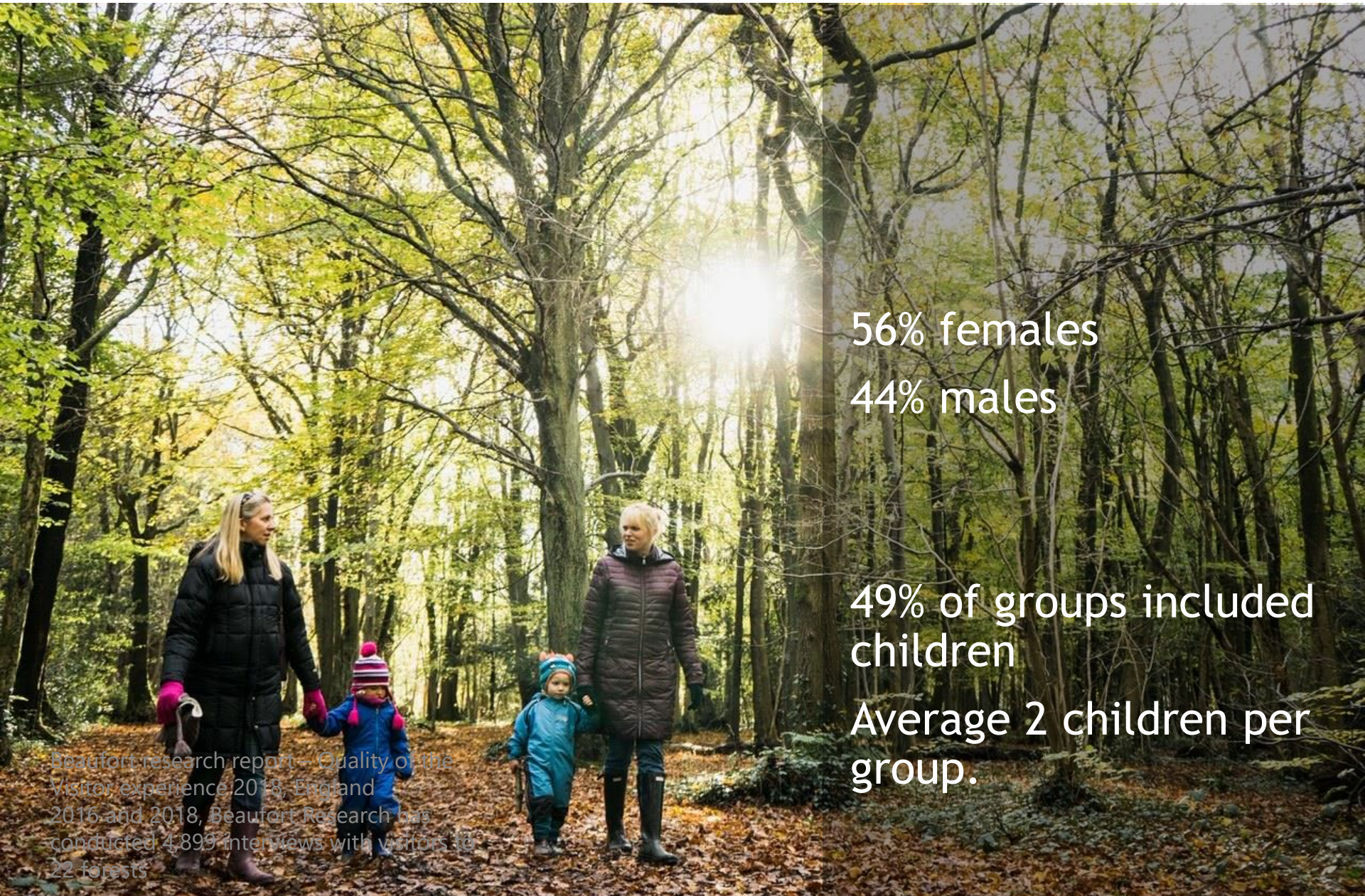
Beaufort research report – Quality of the
Visitor experience 2018, England
2016 and 2018. Beaufort Research has
conducted 4,899 interviews with visitors to
22 forests



- 85% people came to the forest for a day-trip
- People travelled less than three hours to visit each site
- Almost all visitors (97%) live in England
- Visits lasted an average of 2 hours, 26 minutes

Beaufort research report – Quality of the Visitor experience 2018, England 2016 and 2018, Beaufort Research has conducted 4,899 interviews with visitors to 22 forests





56% females
44% males

49% of groups included children

Average 2 children per group.

Beaufort research report – Quality of the Visitor experience 2018, England 2016 and 2018, Beaufort Research has conducted 4,899 interviews with visitors to 22 forests

- 19% were 16-34 years
- 51% of visitors were aged 35-54 years
- 29% were 55 years plus



Beaufort research report – Quality of the Visitor experiences 2018, England 2016 and 2018, Beaufort Research has conducted 4,899 interviews with visitors to 22 forests

Limiting illness	Yes – limited a lot	2
	Yes – limited a little	4
	No	93
	Refused	<1

- 68% were the ABC1 socio-economic groups and 31% were C2DE (three in ten)
- Fineshade tended to attract more DEs while Kielder was more affluent with 52% of AB
- 75% were working

Social class		
	AB	39
	C1	29
	C2	20
	DE	11
	Refused	<1





Beaufort research report – Quality of the Visitor experience 2018, England 2016 and 2018, Beaufort Research has conducted 4,899 interviews with visitors to 22 forests.

97% of visitors were White British or Irish

1% White other

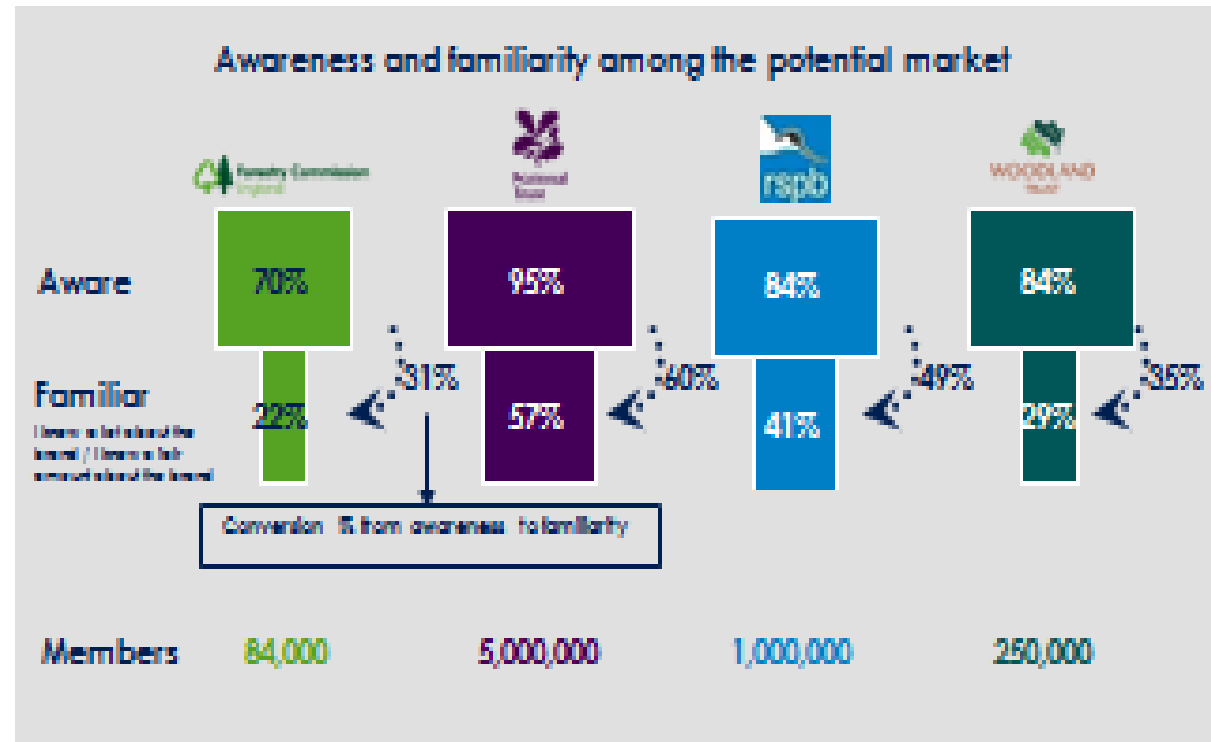
1% BME

- Walking was the most popular physical activity across the sites with 66%. Walking along sign-posted trails and dog walking are popular at most sites
- The most popular non-physical activity included using the café/catering, used by 59% of visitors
- Play areas were used by 26% of visitors
- Walkers spent 1 hour and 21 minutes
- Cyclists spent 2 hours and 26 minutes on average

Beaufort research report - Quality of the Visitor experience 2018, England 2016 and 2018. Beaufort Research has conducted 4,899 interviews with visitors to 22 forests

Average spend per visitor at the site £	£ 21.07
Average spend per visitor in the local area £	£ 35.82

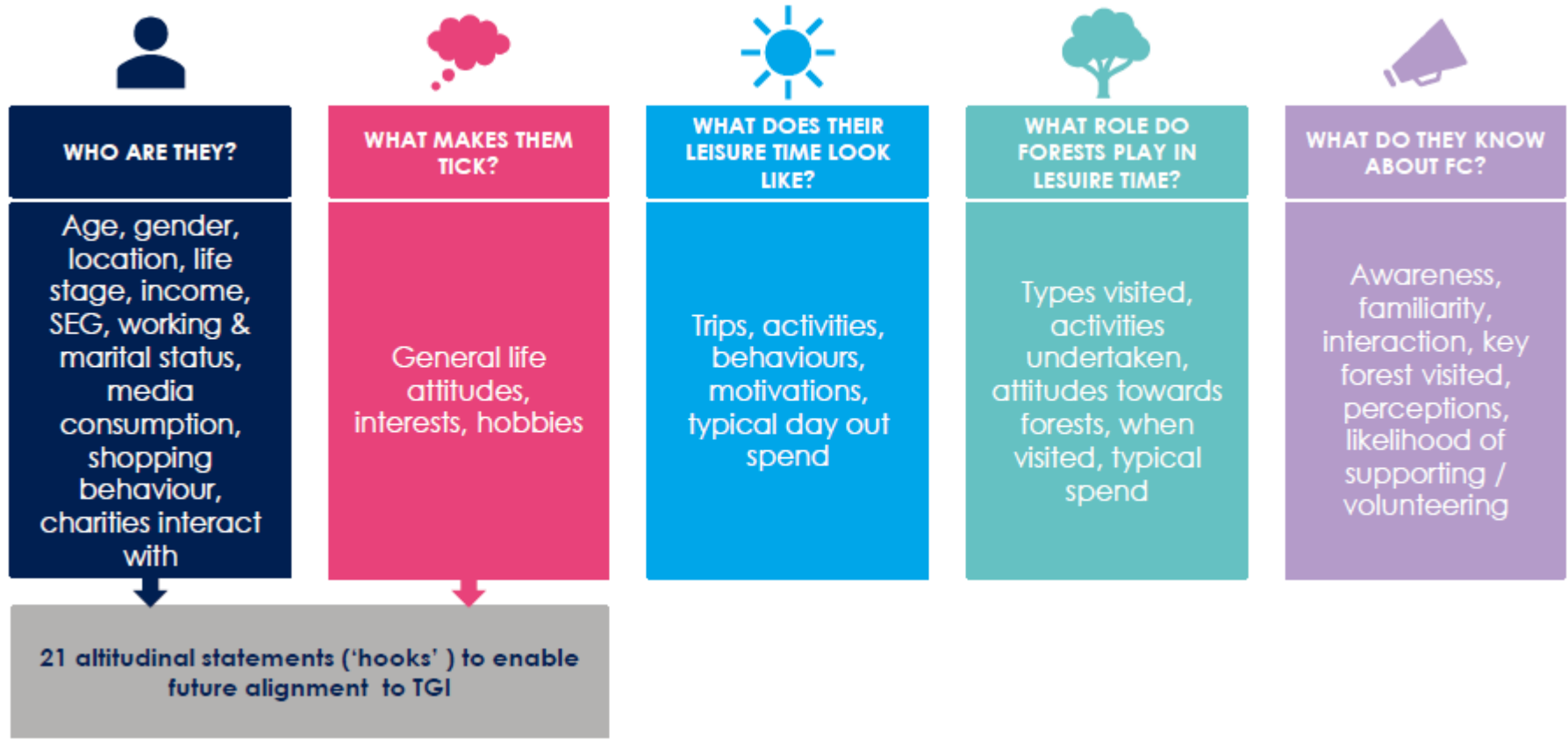
80% (35m)
of the adult population of
England are part of the
potential market



While awareness of Forestry Commission was high,
actual **familiarity with the brand is low**

Awareness for Forestry England is 27%

Segmentation development





Off the beaten trackers

Love getting out in the **great outdoors**, and keen on **nature, wildlife and walking**. Like to make their own plans.

16%



Den builders

Leisure time is **family and friends** time. They look to spend quality time **enjoying** numerous days out **together**.

11%



Activity hunters

Want anything which is **lively** and **exciting**. They cram in as many **activities** and **events** as possible!

12%



Easy pacers

Look for **quiet** and **relaxed** days out. They typically have an a good amount of **free time** and often spend time with grown up families.

19%



Hipster followers

Often career focussed but look to **experience something unique** and different in their free time.

23%

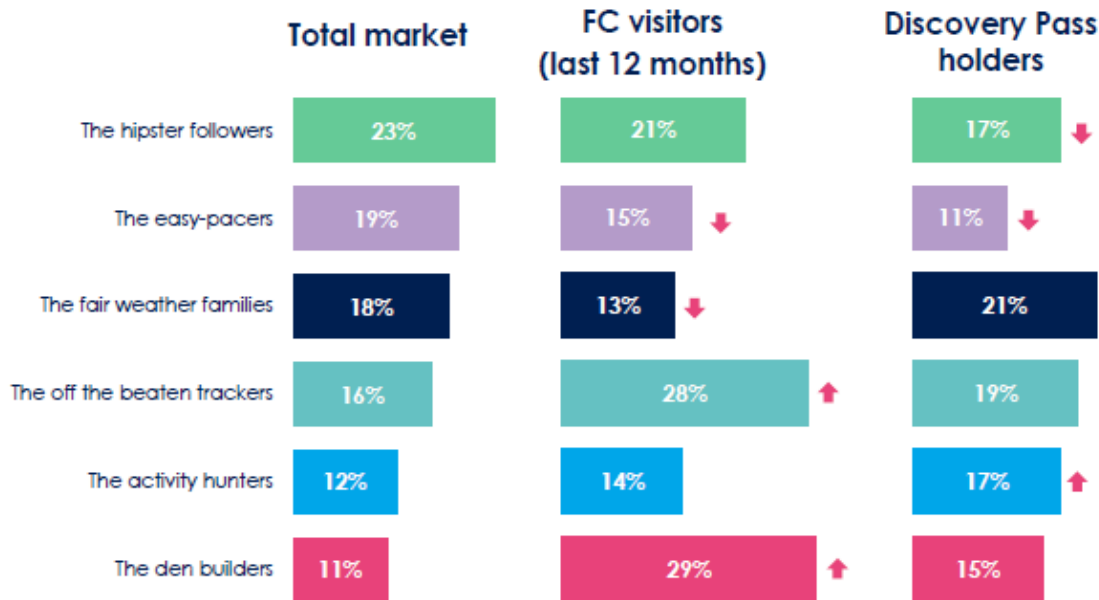


Fair weather families

Look for **low stress** days out - typically putting others enjoyment first. Like familiarity and **tried and tested** experiences.

18%

Distribution of segments



Currently over half (57%) of visitors to Forestry Commission sites are **Off the beaten trackers** or **Den builders**. Both **Easy-pacers** and **Fair weather families** under index compared to the market distribution.

Discover Pass holders are relatively evenly spread across the segments, but do over index among **Activity Hunters**.

The off the beaten trackers



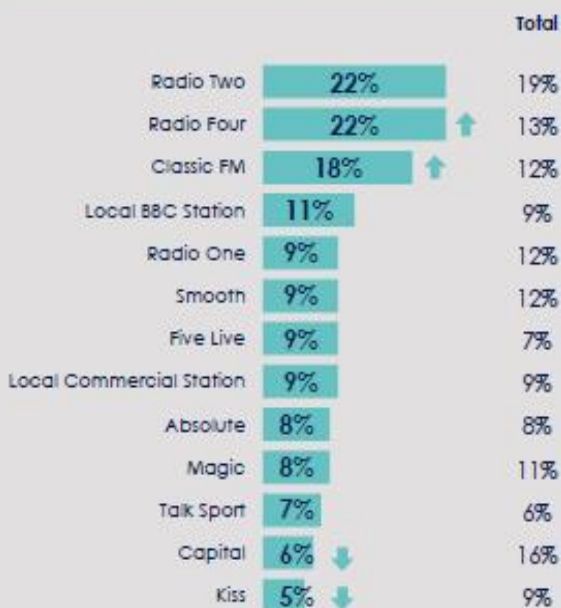
Off the beaten trackers are more likely to tune in to BBC stations both on TV and radio. They watch BBC2 and BBC4 as well as listening to Radio Four and Classic FM.

Social media usage:

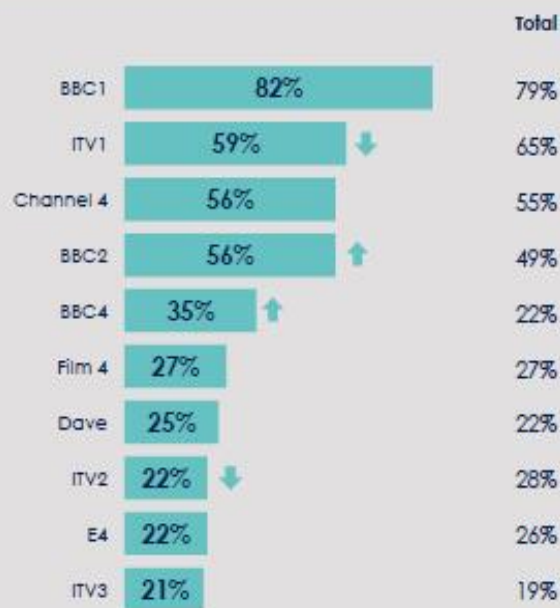


Despite the higher usage of social media we see a lower usage across all platforms

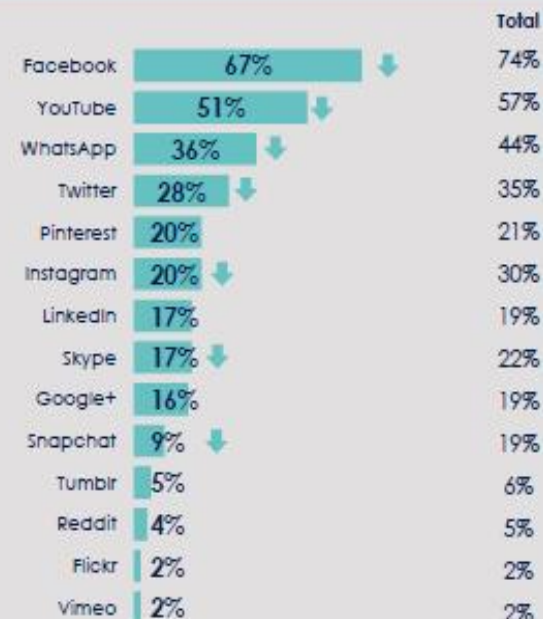
Radio



TV



Social Media









Hipster followers



Fair weather families



Forestry England

Recreation Marketing Strategy 2020-2023

Marketing supports our Recreation business and our mission to connect everyone with the nation's forests. It also allows us to tell the wider story of our work so people will support Forestry England in the future. Here is a summary of the national marketing strategy outlining what we plan to do over the next 3 years.



How marketing supports the Recreation Model

Working with Operations on product development to ensure a superb offer and inform outstanding service and infrastructure

Driving more visits and spend to help Forest Centres to become financially sustainable



Strategy

1. Focus on most profitable off-peak audiences
2. Drive people up the supporter engagement pyramid

Pyramid of supporter engagement

Explore how to support conversions & required infrastructure



Focus of this strategy

Member
Regular visitor / supporter
Visit

Our priority audiences

Den Builders

Family groups with a passion for the outdoors. Look for exciting experiences or a chance to learn, spending quality time as a family.

Why chosen?

- Visit regularly, including off peak months and with pre-school children
- High spend on-site
- High potential to volunteer or donate

Approach: Product development of trails & activities

- 3 year partnership with Magic Light with 1 pre-school trail a year
- Self led activities for older families in off-peak months

Easy Pacers

Look for quiet, relaxed and easy days out with a high standard of facilities. Most often (semi) retired.

Why chosen?

- Largest segment for visiting off peak
- Like to spend on-site at shops and cafes
- Potential audience for legacy giving

Approach: Increase current offer and repackaging current offer

- Research their requirements
- Repackage our current offer (where appropriate) to make more accessible to them
- Let them know about it through relevant partners & channels

Activity Hunters

Affluent, young – middle aged thrill seekers, that look for activities and events to fulfill their sense of adventure.

Why chosen?

- Highest potential spenders
- Will visit throughout the year and at the start/end of day
- Passionate about current offer
- Highest potential to volunteer or donate

Approach: Engagement

- Build relationships with them using influencers and ambassadors
- Reach them through their own established channels to turn them into advocates
- Encourage off peak visits through promotion of core offer and Active Forest events / activities

Action Plan

	2020				2021				2022	
	Winter Dec - Feb	Spring Mar - May	Summer Jun - Aug	Autumn Sep - Nov	Winter Dec - Feb	Spring Mar - May	Summer Jun - Aug	Autumn Sep - Nov		
Den Builders (pre-schools)			Gruffalo Spotters 2.0		Magic Light partnership to tie into 2020 Xmas film				New collaboration or visit plan	
Den Builders (older families & learning)	Shap the Sheep	Develop activity club for older children			Launch activity club					
Easy Pacers	Research	Lightweight promotion B develop proposition	Launch promotion		Promote		Promote		Promote spring & autumn	
Activity Hunters	Running		Running series		Cycling				Promote winter & spring	
Other	Brand / Christmas		Forest Live		Christmas		Forest Live		Forest Live / Christmas	

KPIs

We will measure the following to show the success of this plan. Detailed KPIs can be found in full strategy document:

- Awareness of Forestry England brand
- Increase in levels of trust and familiarity to Forestry England
- Visitor numbers
- Car parking income and avg. spend per head
- Database subscriptions and social media following
- Membership sales & income

For more information contact Katy David on katy.david@forestryengland.uk

Population analysis within 10 mile radius of Haldon shows **1 in 3 people are over 60 years old**

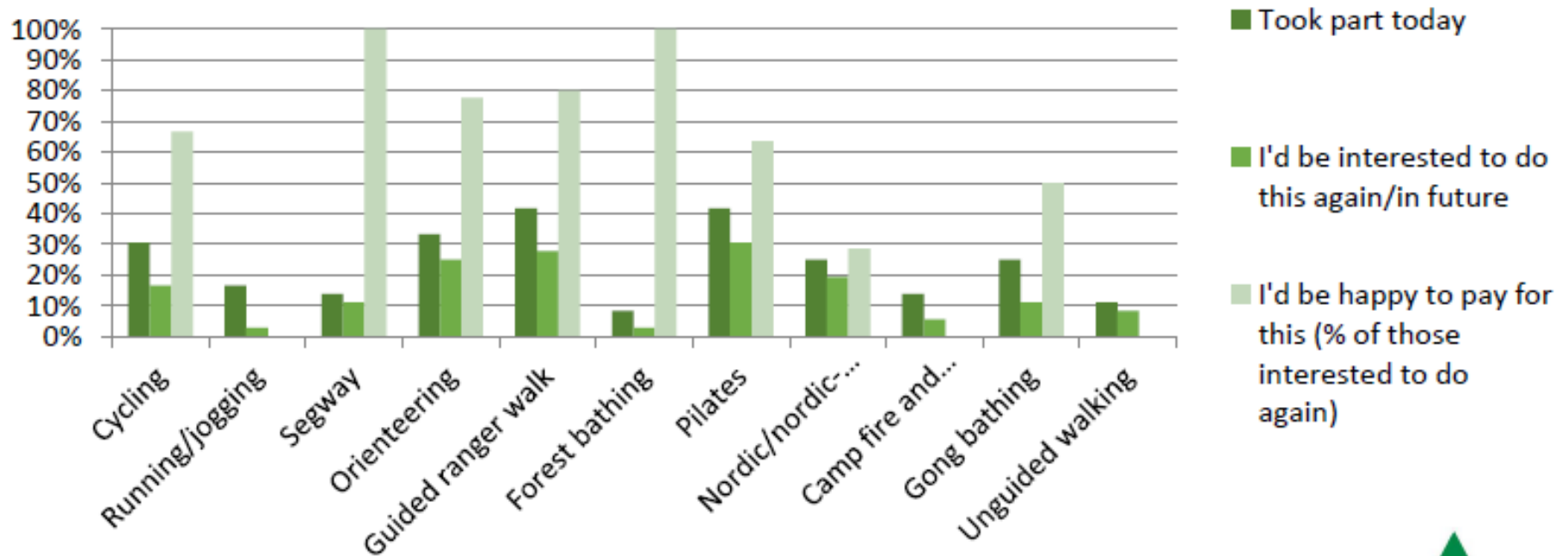
Visitor surveys have demonstrated **less than 1 in 20** of our visitors fall into this age category

Haldon at capacity at weekends, plenty of scope to increase visitor numbers during the week



Event evaluation

Which activities did you take part in today and would you be interested in doing them again?



NOTES: The activities participants were most keen to repeat are Segway, orienteering, ranger walk and Pilates. Many participants didn't answer whether they would pay for these but for those who did, they were most willing to pay for Segway and orienteering.



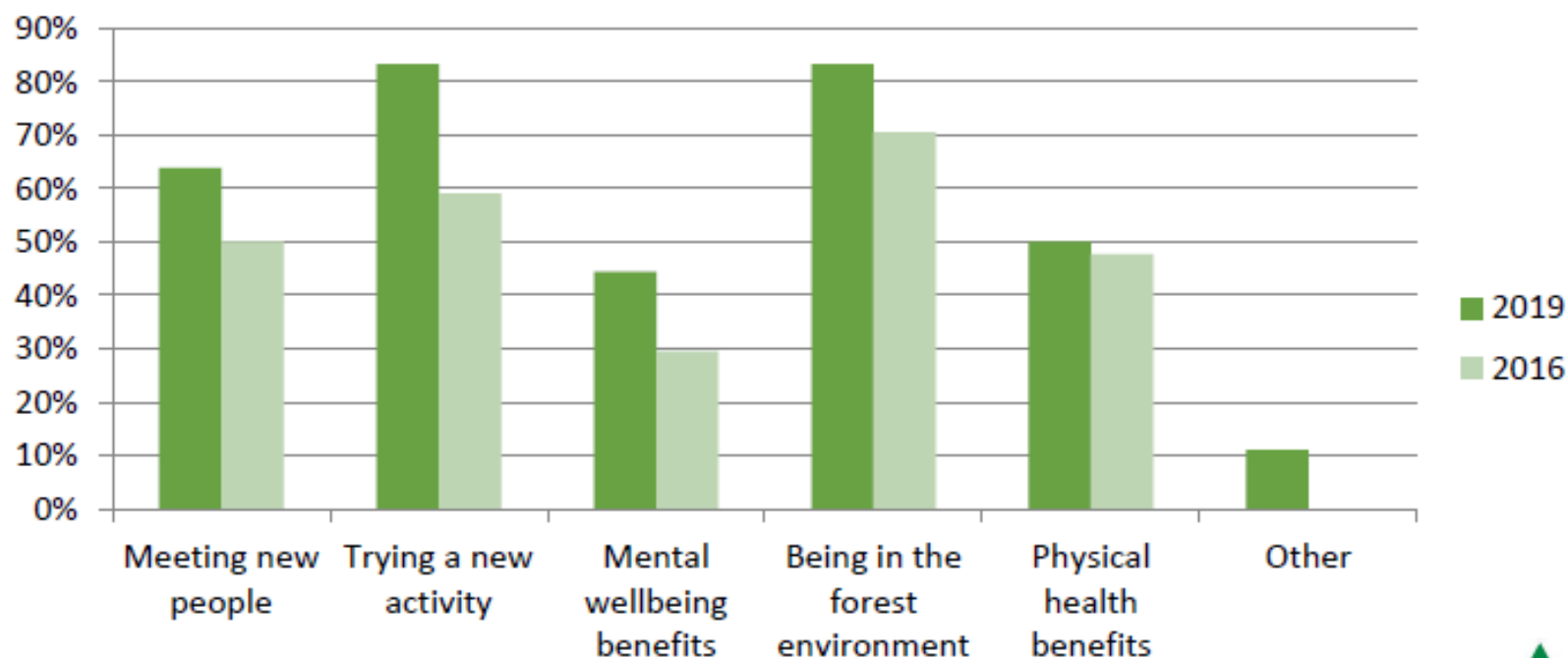


- Fully accessible shorter, trail loop
- 2 shelter structures and a bird hide
- 2 additional trampers, bringing fleet up to 4
- Large yurt for under-cover activities in the forest (yoga / pilates etc)
- More accessible orienteering courses
- Specially adapted bikes
- Improved interpretation



Event evaluation

What did you enjoy most about today?



NOTES: Trends remain very similar from 2016, with new activities and time in the forest being the most enjoyable event factors.



Active Forests: parkrun

Active Forests is focused on Getting Active Outdoors segments: Explorers, Fitness in Nature and Challengers, which total **71% of the outdoor market**

Getting Active Outdoors Segmentation - parkrun falls in the **Fitness in Nature** segment

Correlates to **Activity Hunters** with some cross over into **Den Builder** parents

Forestry England's parkrun stats:

21 parkrun or junior parkrun events each weekend

3,000 - 3,500 participants each weekend

7 more in the pipeline starting soon

57,590 parkrun participants registered with a Forestry England home site

613,305 parkruns completed on the estate

71,773 volunteer occasions

9,007 individual volunteers



Salcey Forest, Northamptonshire

Our newest parkrun

6 events with over 1,000 runs completed

Site projecting £15k car parking income, café reported £600 increase in turn over per week to date

Bedgebury, Kent

Introduced an off peak £3 charge on Saturdays before 10.30am

So successful has been extended to 11am 7 days a week

Now target this off peak time as an opportunity to offer active activities and have a timetable including running groups, Nordic walking and yoga

Café offers 10% off to parkrunners

Off peak site entry fee generating £15k p.a. attributed principally to active visits

Alice Holt Forest, Surrey

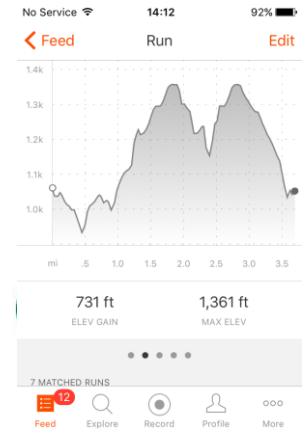
Calculated via ANPR that each parkrunner is worth 80p Generated over £66k

On average 20% of their runners have membership

Whinlatter Forest, Cumbria







Highest parkrun elevation in England

Nicknamed 'Beauty and the Beast'!



Any Questions?



		% of days out market:	Key stats:	Visit at least once every 3 months:	What forests mean to them...
 <p>The off the beaten trackers</p>	<p>Look for peaceful days out that capture their fascination for the great outdoors, nature and wildlife.</p>	<p>16%</p> <p>5.5m people</p>	<ul style="list-style-type: none"> Generally older demographic - Average age: 52 (47% aged 55+) Child-free leisure time - 81% usually spend days out without kids High frequency of day trips - 49% take at least five day trips a year 	<p>Forest with visitor centre: 24%</p> <p>Forest without visitor centre: 53%</p>	<p>They are places they go to escape, avoiding crowds and busy destinations, to find peace and tranquillity.</p> <p>They see them as great places to spend their leisure time with friends and family, allowing them to enjoy their outdoor hobbies and interests (typically non-sporting / low intensity).</p>
 <p>The den builders</p>	<p>Look for exciting experiences they can enjoy together as a family or friends.</p>	<p>11%</p> <p>3.9m people</p>	<ul style="list-style-type: none"> Generally more middle aged - Average age: 46 (46% aged 25-44) Family leisure time - 60% usually spend days out with kids High frequency of day trips - 50% take at least five day trips a year 	<p>Forest with visitor centre: 30%</p> <p>Forest without visitor centre: 32%</p>	<p>They are a great destination for a full day out. Forests provide a slightly more peaceful day out than other places they visit.</p> <p>Its all about spending enjoyable time with the family, and they prefer forests that have on-site facilities. They don't mind having to travel to get there.</p>
 <p>The activity hunters</p>	<p>Look for activities and events that can thrill and fulfil their sense of adventure.</p>	<p>12%</p> <p>4.2m people</p>	<ul style="list-style-type: none"> Tend to be younger - Average age: 37 (54% aged under 35) Affluent - 70% ABC1, tend to be career minded and higher earners Active - 72% use their leisure time to play sport and exercising 	<p>Forest with visitor centre: 24%</p> <p>Forest without visitor centre: 30%</p>	<p>They are the backdrop for a day out - the destination is secondary to what fun things there are to do.</p> <p>To them, forests offer a great playground to indulge in hobbies, try new activities or attend an event.</p>
 <p>The easy-pacers</p>	<p>Look for quiet, relaxed and easy days out which have high standard facilities.</p>	<p>19%</p> <p>6.7m people</p>	<ul style="list-style-type: none"> Generally older demographic - Average age: 58 (62% aged 55+) Family leisure time (with grown-up children) - 28% usually spend days out with their grown-up children Less likely to be working full-time - Only 23% are employed full-time or self employed 	<p>Forest with visitor centre: 17%</p> <p>Forest without visitor centre: 21%</p>	<p>They are places they go to relax and enjoy the beauty, and appreciate on-site facilities such as cafés and shops.</p> <p>They like spending their leisure time with friends and family, particularly when the weather is nice. However, they tend to avoid busy events and enjoy walking and outdoor hobbies (typically non-sporting / low intensity).</p>
 <p>The hipster followers</p>	<p>Look to maximise their free time with something new, unique or different.</p>	<p>23%</p> <p>8.0m people</p>	<ul style="list-style-type: none"> Young to middle ages - Average age: 42 (56% aged 18-44) Pre-family - 70% do not have kids Friend orientated - 49% spend leisure time with friends (lowest proportion spending it with family) 	<p>Forest with visitor centre: 20%</p> <p>Forest without visitor centre: 31%</p>	<p>Possess a relatively passive view on forests as a visitor destination.</p> <p>They are somewhere to enjoy the occasional walk, cycle or to pursue a hobby.</p>
 <p>The fair weather families</p>	<p>Look for simple, good value, tried and tested, low challenge days out.</p>	<p>18%</p> <p>6.4m people</p>	<ul style="list-style-type: none"> Generally more middle aged - Average age: 46 (45% aged 35-54) Family leisure time - 54% usually spend days out with kids Budget conscious - 52% actively look for discounts and offers for their leisure time 	<p>Forest with visitor centre: 19%</p> <p>Forest without visitor centre: 25%</p>	<p>They are places they go to occupy the family, particularly when there is an event or activity on.</p> <p>They see them as a good place to go when the weather is nice for a hassle free day out, where the children can enjoy the woods and play areas.</p>