



Forestry Commission



Forest Research

# Leisure landscapes

Exploring the role of forestry in tourism



Suzanne Martin Social and Economic Research Group



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**Keywords:** woodlands, tourism, tourism enterprises, tourism businesses, planners and managers, partnership, values, uses, innovation, integrated land management

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# Foreword

People love woods and forests for all sorts of reasons: for the wildlife, the natural and cultural heritage, the peace and quiet, the opportunities to take part in strenuous sport or to relax, walk the dog, enjoy the company of family and friends, or to enjoy solitude. The Forestry Commission has a long history of welcoming people to forests and it is a great pleasure to see the Commission still at the forefront of this activity.

It is astonishing to realise that the Commission established Argyll Forest Park in 1935 — and just think of all that has happened since. From cross-country skiing to dog sled racing; from rallying to paddling canoes; from orienteering to mountain biking; no doubt someone somewhere has been developing other interesting activities too. Enthusiasts have found new places to visit and explore; they care for these places with a passion. Think of Glen Affric, the New Forest and Snowdonia. The list for Scotland alone could fill the rest of this report.

Foresters are rightly renowned for delivering things on the ground. The old practice was to try things out in the national forest and then promote the ideas more widely through advice and grant aid. Networks and ways of transferring technology may be more sophisticated now, but they still depend on enthusiasts. Such people recognised early on the great value that people place on forests for leisure, recreation and tourism. Nevertheless, it still came as a surprise to many when, in the 1970s, work by environmental economists showed that the value of forests for recreation was in many cases greater than the value for timber production. As luck would have it, we can both have our cake and eat it, delivering social, environmental and economic benefits at the same time. We can do it even better if we work with all the other people and organisations involved.

Work in 1999–2000 showed that the annual forest-related tourism day-visit expenditure alone, in Britain, was more than £2 billion. In addition, we know that expenditures in fragile rural areas can make all the difference to the economic well-being of communities, as shown by mountain-biking events that have brought thousands of visitors and millions of pounds to remote rural areas in the Highlands of Scotland.

The potential for good is enormous and, by working with others in the forestry and tourism industries, as well as local communities, we can ensure that more and more people have the opportunity to enjoy the forest, for freedom or for whatever they choose. That's where research of the kind that Dr Suzanne Martin and her team carry out makes its mark; opening doors, making connections and enabling more to happen. And for that we should all be grateful.

**Richard Broadhurst**  
Forestry Commission Scotland



# Preface

Forestry policy in Great Britain regards tourism as an important component of multi-purpose forestry and emphasises its role in the diversification of the rural economy. Public demand for outdoor leisure is increasingly sophisticated. Our understanding of the role that forestry may play in the provision of tourism opportunities is, however, not well developed. While some research has explored consumer preferences and the uses of woodlands for leisure purposes, there has been very little work examining the relationship between those who supply tourism products and services and the forestry sector.

The Leisure Landscapes project sought to address this gap in understanding by addressing questions such as: How do tourism providers perceive the current and potential values and uses of woods for tourism? What are their experiences and views of the opportunities and constraints of forest management for tourism? What are their aspirations for the development of relations between the managers of woodlands and those involved in tourism provision? The work, funded by the Forestry Commission, engaged with tourism providers in three case-study areas across Scotland, England and Wales. Data were collected through 29 in-depth interviews with planners and managers. These organisations covered a broad range of policy areas. Information was also gathered through nine discussion groups with tourism enterprises who provided services in areas such as accommodation, food, gifts, sports and arts activities.

This publication aims to provide an insight into the role of the forestry sector in tourism provision. It is targeted at people such as land managers, tourism operators and policy makers who have an interest in woodland management and leisure. The *Executive overview* provides a brief outline of the context of the work and its key findings. The section entitled *Background to the research* provides a synopsis of the need for and importance of research exploring the links between forestry and tourism provision. The section on *Research aims and methods* explains the questions that the research explored and how it was conducted. The next chapter, *Research results*, records the findings from in-depth interviews with planners and managers and from discussion groups with tourism enterprises. It explores people's perceptions of woodlands and their role in contemporary society, values and uses of woodlands for tourism, issues surrounding forestry sector involvement in tourism, as well as the relationships between woodland managers and tourism providers. The *Conclusions and recommendations* section develops the findings into a short discussion before speculating on their implications for policy, practice and future research.

# Executive overview



Tourism uses of woodlands are increasingly important in UK forestry and land-use policy because of the benefits that wooded landscapes provide to the leisure sector, including the generation of revenue for forestry owners, tourism businesses, organisations and enterprises. This research indicates further potential for the forestry sector to benefit from leisure activities and for it to generate economic and other advantages for the wider tourism sector.

While some research has explored leisure uses of woodlands, it has concentrated on understanding consumer uses, needs and preferences. There is a lack of knowledge about the current and potential uses of woodlands by tourism providers, their relations with forestry managers, and the strengths and weaknesses of land management for tourism activities. The Leisure Landscapes research project set out to explore these issues in three case-study areas across Scotland, England and Wales. Each area was selected to provide a contrast in terms of woodland type, socio-economic structure of local communities, and level of tourism sector development. Tourism providers were engaged through the use of in-depth interviews and discussion groups.

## Key research results

Woodlands have a broad range of values for tourism, with the activities of the forestry sector influencing the success of tourism enterprises as well as the wider social and environmental impacts of tourism.

Planners and managers value woodlands for their technical qualities, such as their robustness and extensiveness, sound absorption and visual screening abilities. They can be used all year round and have the ability to provide shelter from hot, cold and wet weather. Woodlands absorb a wide variety of uses, including those that are physically destructive, noisy and/or visually intrusive. In contrast to many other green spaces, woodlands can assist with the mitigation of the negative social and environmental impacts of tourism activity, such as noise and visual pollution, and trampling of sensitive vegetation.

Tourism enterprises emphasise the economic value of woodlands in terms of their ability to attract people to visit tourism areas, extend the length of time people stay at those destinations and increase the length of the tourist season. These benefits are seen to be a function of woodland imagery, ambience and aesthetics (which influence tourism area identity), the accessibility of the woodland environment, including its flora and fauna, and man-made products and services such as visitor centres, trails and interpretation.

The way that woodlands integrate with surrounding land uses and tourism products and services is shown to be critical in shaping the influence of forestry on tourism. Woodlands do not have to be extensive to have a considerable impact on the leisure sector.

Tourism enterprises exploit woodlands through a broad range of direct and indirect uses. Table 1 provides some examples.

<b>Table 1</b> Examples of direct and indirect uses of woodlands made by enterprises in this study	
<b>Direct uses</b>	<b>Indirect uses</b>
Use of trails, picnic tables and interpretation boards by a guided walking tour company.	Word-of-mouth references to the presence of woodland trails and interpretation by a heritage-based tourist attraction.
Picking of sloes and mushrooms by a bed-and-breakfast owner to make into food and drink products to serve to guests.	The display of leaflets on woodland tourism facilities by the manager of a hotel.
Use of the sights, sounds and atmosphere of 'wild' areas away from marked trails by an activity provider to stimulate creativity and discussion amongst children.	Word-of-mouth references to the presence of mushrooms in a local woodland by a hostel owner. Use of images of woodlands in marketing literature by an outdoor adventure centre.

The way in which enterprises use woodlands cannot be predicted from their core services, for example accommodation or sports activity provision. Instead, the different uses of woodland reflect the broad range of products and services that an enterprise provides.

In exploring tourism enterprise uses, the diverse nature of woodland tourism products and services is apparent. For example, they include food and drink products, accommodation, trails, visitor centres, car parks and picnic sites as well as artistic, sporting and educational activities. Also they are provided by a broad range of people, including accommodation establishments, activity and arts enterprises, pubs and shops, as well as those who own and manage woodland.

Many of the tourism providers who participated in this study felt that they could be more competitive as enterprises if they developed physical and virtual linkages with woodlands; they wanted the forestry and tourism sectors to work in closer partnership, to share a broad range of resources to plan, provide, market and maintain tourism facilities and services. They saw the transfer of knowledge in land management for tourism as a key area where collaboration could be pursued, and felt that partnership working would result in added diversity and depth of tourism experiences and increased accessibility to woodland tourism products and services.

## Increasing the contribution of forestry to tourism

### Recommendations for policy and practice

The actions suggested by this research are set out below. Taking them forward is likely to require an individual or organisation to take specific responsibility for their planning and delivery. Piloting a developmental programme at a regional or sub-regional scale should be considered as a preliminary step to building capacity and developing skills and understanding.

The following recommendations are made for policy and practice.

#### **Promote and enable innovation in the use of woodlands for tourism**

Forestry policy places considerable emphasis on tourism as a means to diversify the rural economy. Tourism providers, however, feel that the processes and resources to facilitate innovation and entrepreneurship are lacking within the forestry sector. As a result, many ideas for woodland tourism development remain unrealised. It is recommended that the Forestry Commission should develop a mechanism to promote innovation and deliver the appropriate level of resources necessary for growth in woodland leisure opportunities.



### **Increase awareness and utilisation of woodland tourism values**

Given the lack of understanding amongst tourism providers about the role of woodlands in leisure provision, land managers and the Forestry Commission should improve their communication and provide training. The methods of communication should be appropriate to small and medium-sized enterprises in the tourism sector.

Case studies and examples of best practice are needed to demonstrate how forestry can be used to provide benefits to the tourism sector. They would highlight, for example, how woodlands can be used to provide positive imagery, access to wild resources such as plants and animals, and to man-made facilities and services such as trails and guided walks. This would also draw attention to the potential use of the physical robustness, noise absorption and visual screening qualities of woodlands to help mitigate the negative social and environmental impacts of leisure activities. A portfolio of particularly successful or innovative case studies should be developed.

### **Map and develop knowledge and skills in tourism**

Planners and managers stressed the potential for the forestry sector to transfer its knowledge and skills in land management for tourism to other countryside managers. Work being undertaken to map, record and collate such knowledge and skills and disseminate them to those wishing to develop countryside tourism facilities and services might be taken forward. It was also felt that land managers would benefit from an increased understanding of tourism activities, especially marketing. An analysis of the tourism skills gaps of woodland managers and suggestions for ways of proactively building tourism knowledge and skills within the forestry sector, for example through tourism skills workshops, should be pursued.

### **Collate good practice in landscape design for tourism**

The benefits that landscape design can deliver for tourism were strongly endorsed by tourism providers. There was, however, a perception of the need to apply its principles more consistently. Collation and dissemination of good practice in landscape design for tourism should be pursued.

### **Take a strategic and planned landscape-scale approach to woodland tourism provision**

A landscape-scale approach to woodland development for tourism is suggested, with a strategic focus on integrating physical and social landscape resources such as land uses and the knowledge and skills of people living in local communities. This would include creating geographical and thematic linkages between products and services so as to create more coherent products.

### **Develop guidelines and processes for scoping the impacts of timber production on tourism**

Concern and frustration were expressed about the negative impacts of timber production on tourism. Litter, damage to facilities, timber lorry traffic and the length of closure of woodland areas for felling were particular grievances. Processes to scope timber production activities for impacts on tourism and development of guidelines on best practice in the mitigation of negative impacts should be considered. Advice on good practice for contractors is suggested, together with systems to monitor performance.

### **Take a more holistic view of woodland tourism resources**

There is a need to move away from narrow perceptions of woodland tourism resources that focus on man-made products and services. Managers should be encouraged to take a more holistic view of the assets that the forestry sector has available to support sustainable leisure provision and to emphasise the importance of biological products and 'wild' areas, as well as woodland imagery and ambience, as important dimensions of tourism.

### **Consider the availability and sustainability of resources for recreation infrastructure provision, marketing and maintenance**

Doubts were raised about the adequacy of capital and revenue funding for tourism infrastructure. This included a perceived shortage of finance for partnership working between tourism providers and woodland managers. This should be considered alongside the conditions and processes through which funds are distributed.

### **Broaden our understanding of woodland tourism providers**

The people and organisations who value and utilise woodlands for tourism purposes and who play a role in woodland tourism provision are diverse. For example, they include owners of accommodation establishments, pubs and shops, sports and adventure activity providers, and those providing arts and interpretation services. It is important that land managers take a broad view of those who constitute 'woodland tourism providers' and incorporate them into public woodland management.

### **Place a stronger emphasis on considering the ways in which woodlands are developed for tourism**

Tourism providers should be explicitly recognised as stakeholders in public woodland management. This would aid understanding of the needs and aspirations of tourism enterprises and thus facilitate the identification of opportunities for the development of woodland tourism activities as well as the mitigation of conflicts between woodland uses and user groups.

### **Recommendations for action**

This research indicates a number of further actions:

1. to identify social and economic clusters within the woodland tourism sector where intervention is likely to give the desired returns
2. to develop a strategy for innovation in woodland tourism
3. to build landscape-scale planning for tourism development into state forestry and into forestry grants
4. to research woodland management cultures and practices and their impacts on the delivery of tourism opportunities.

## Background to the research



Interest in woodlands<sup>1</sup> for tourism has gained new impetus, with national forestry strategies in Great Britain (Forestry Commission 1998, 2001; Scottish Executive, 2000) (see Box 1) and many regional forestry strategies now including the delivery of tourism benefits as a key feature. Tourism is therefore becoming an increasingly important focus in sustainable woodland management.

One reason for this rising emphasis on tourism is the increasingly sophisticated public demand for leisure activities. Another factor is the expectation that tourism can deliver economic benefits to woodland owners wishing to diversify away from timber production, as well as stakeholders such as local communities, organisations and businesses, who may be interested in using wooded land to deliver tourism services. Tourism is regarded as a key force in the diversification of the rural economy, away from its traditional reliance on 'production', towards newly emerging consumption or service-related demands and benefits (Figure 1). In forestry, this has been referred to as a shift from 'industrial' to 'post-industrial' activity (Mather, 2001).

**Figure 1** Tourism is seen as having an important role to play in the diversification of the rural economy



<sup>1</sup> Throughout this report, the term 'woodlands' is used to refer to any area of land where trees grow, regardless of area of land covered, its ownership, or the age and species of trees present.

**Box 1**

## National forestry strategies and tourism

**Wales**

The Welsh Woodland Strategy notes that woodlands provide a setting for many tourist enterprises and promotes a partnership approach to developing a high-quality visitor experience, developing the supply of woodland products to the tourism industry, encouraging the use of woodland as part of the setting for tourist developments, and the development of specialist recreation and accommodation in woodland. The aim of these actions is to support rural economic development (Forestry Commission, 2001, p 35).

**England**

In England, the Government's programme of forestry aims to ensure that 'woods and forests continue to be used for a wide range of recreational pursuits as well as complementing and supporting other leisure interests, notably the tourist trade' (Forestry Commission, 1998, p 18). This highlights the need to 'support research into the economic contribution that woodlands and forests make to tourism and the potential for forest-based tourism initiatives to benefit local communities' (Forestry Commission, 1998, p 20).

**Scotland**

The Scottish Forestry Strategy aims to 'help add value to the Scottish tourism industry and increase the benefits of it to woodland owners and local communities' (Scottish Executive, 2006, p 31).

Tourism is one of the largest and fastest growing industries in the world and generated around £74.2 billion to the UK economy in 2003 (Star UK, 2004). The UK forestry sector, in comparison, generated around £322 million for the economy in that year (Office for National Statistics, 2004). Development in tourism is particularly strong in specialist or 'alternative' activities, for example those relating to cultural, environmental, sports and adventure pursuits. The size, rate and nature of growth in tourism provide an opportunity for diversification of the rural economy, including forestry activities, through tourism development.

The *United Kingdom Leisure Day Visits Survey*, the *Forestry Commission Public Opinion of Forestry Survey* and *Forest Enterprise Visitor Monitoring Surveys* are key sources of information on leisure uses of woodlands in Great Britain. They show that around two-thirds of adults have visited British woodlands in the last few years (Forestry Commission, 2005) and that people living in Great Britain use them to make around 250 million day-visits each year (TNS Travel and Tourism, 2004). Research by Hill *et al.* (2003) found that day-tourism spending related to woodlands accounts for around £2.3 billion in the UK (over 3% of total tourism expenditure) and that on average 13% of tourism spending in six sampling areas was 'forest associated'. While these figures are substantial, there is considerable potential for expansion.

Work exploring the influence of forestry on rural development in three case-study areas in England and Wales has found that the greatest impact comes from 'halo effects' (Slee *et al.*, 2003; Slee, 2004) – that is, the influence of forestry on the generation of income within woodland localities and where income goes to local businesses rather than woodland owners. The degree of importance of these shadow values for local tourism economies is influenced by a range of factors, such as the location of woodlands in relation to key tourism markets, woodland type and local geography. Rural resources, including woodlands, can therefore be seen as 'countryside capital', generating economic benefits for rural areas (Garrod *et al.*, 2006).

In addition to these studies, research by Macnaghten *et al.* (1998), Future Foundation (1998) and NFO World Group (2002) used qualitative research to develop a deeper understanding of the connections between woodlands and leisure users; for example by examining perceptions of current and potential uses of woodlands and factors that influence quality of experience.



While invaluable for providing managers and policy makers with tourism knowledge, these studies do not provide information on the values and uses that the suppliers of tourism services associate with woodlands, the opportunities and constraints of woodland management for tourism, and the potential for the development of relations between land managers and tourism providers. An understanding of such connections is, however, fundamental if a holistic and balanced approach to the development of woodlands for tourism is to be achieved and their potential maximised.

The importance of understanding these relationships was pinpointed during the outbreak of Foot and Mouth Disease in 2001, when a lack of knowledge about how woodlands are utilised by tourism service providers resulted in management decisions being taken that showed an inadequate understanding of the impacts of countryside 'closures' on the tourism industry (Williams and Ferguson, 2002). As a result of the outbreak, it was clear that the values of woodlands for tourism are greater and more diverse than previously recognised. The importance of understanding and accounting for the role of woodland in the tourism economy when developing management policies and practices was emphasised. The Leisure Landscapes research project was established to develop our understanding of this role and how it might evolve to deliver benefits to tourism providers and woodland managers.



# Research aims and methods



## Aims

The project aimed to work with tourism providers to identify and explore how they:

- value and use woodlands for tourism
- feel woodlands could be better managed to deliver benefits for tourism
- understand relationships between woodland managers (including the Forestry Commission)<sup>2</sup> and tourism providers, and if/how they would like them to be developed<sup>3</sup>

## Approach

### Selected study areas

These issues were explored in three study areas (see Figure 2):

- Great Glen in the Scottish Highlands
- Suffolk Coasts and Heaths in the East of England
- Dyfi Valley in mid-Wales

These areas were selected because they provided contrasting situations in terms of woodland structure, socio-economic composition of local communities and the degree and nature of tourism development.

### Research methods

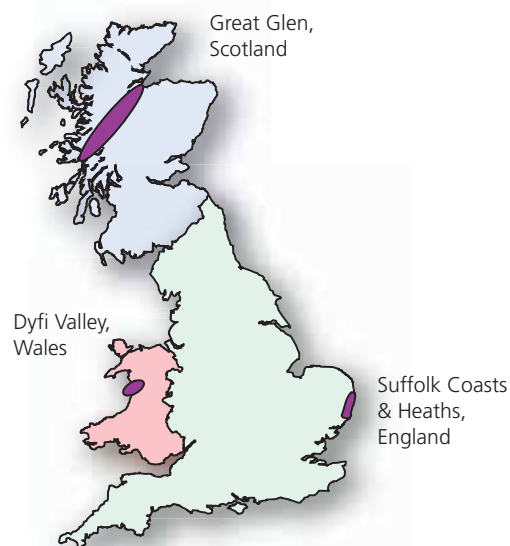
Tourism providers within each study area were sampled to take part in the work. They were classified into two groups:

- *Planners and managers*: generally those with a formal policy remit within a particular subject area (see Table 2).
- *Tourism enterprises*: local businesses and organisations providing services that are currently or potentially linked to tourism (see Table 3).

<sup>2</sup> The Forestry Commission is the Government department dealing with forestry policy within Great Britain. Forestry is a devolved area of policy and therefore Forestry Commission England, Forestry Commission Scotland and Forestry Commission Wales each report to their respective ministers. As well as providing guidance on policy and administering forest and woodland grant schemes, the Forestry Commission also manages the public forest estate in England, Scotland and Wales. Three Forest Enterprise agencies (in England, Scotland and Wales) deal with the management of the public forest estate on behalf of the Forestry Commission. Within each country different approaches are taken with regard to the extent to which the terms 'Forestry Commission' and 'Forest Enterprise' are used. In order to avoid complication, this report will refer only to the Forestry Commission and will use this term to refer to the public forest management role as well as the policy and grant administration function of the Commission.

<sup>3</sup> Whilst research participants were asked to discuss relationships with forest managers generally, it should be noted that the focus of discussions often fell upon Forestry Commission managers.

Figure 2 Map of study areas



Qualitative research methods (in-depth interviews and discussion groups) were used to engage with tourism providers, enabling research participants to give detailed explanations of their values, relations and experiences associated with woodlands and land managers. These methods allowed an unconstrained and in-depth exploration of issues and perspectives and encouraged research participants to introduce any issues they saw as relevant to the research topic rather than simply responding to those introduced by the researcher. All of these characteristics were felt to be especially important in understanding the relationships between forestry and tourism providers.

In total, 29 in-depth interviews (between six and eleven in each study area) were conducted. Organisations interviewed were chosen from the sectors listed in Table 2. The intention was to cover as many of the sectors as possible within each study area. Interviewees were identified through discussions with local Forestry Commission staff as well as telephone and email conversations with the organisations themselves. Discussions were facilitated using a 'theme guide' and lasted about one hour.

<b>Table 2</b> Sectors covered by in-depth interviews with planners and managers			
	<b>Great Glen, Scotland</b>	<b>Suffolk Coasts and Heaths, England</b>	<b>Dyfi Valley, Wales</b>
Arts/culture	x	✓	x
Economic development	✓	✓	✓
Education	x	✓	x
Forestry	✓	✓	✓
Health	x	✓	x
Land/water management	✓	✓	✓
Man-made heritage	✓	✓	x
Natural heritage	✓	✓	✓
Sports/recreation	✓	✓	✓
Tourism	✓	✓	✓

Representatives of tourism enterprises took part in the work through discussion groups and were split into the categories shown in Table 3. One discussion group per category was held in each study area (Figure 3). In total there were nine groups (three in each study area).

Enterprises were identified through Forestry Commission staff, telephone calls and visits to local tourist information centres as well as Internet searches. They were recruited so that a broad mix of enterprises was included in terms of the proximity of the establishment to woodland, the extent to which woodlands were referred to in their marketing literature, and the extent of their previous contact with the Forestry Commission.

The types of enterprise taking part reflected the tourism enterprise characteristics of each study area. So, for example, within the Great Glen, sports activity providers were numerous and diverse. In the Suffolk Coasts and Heaths, the arts sector was particularly strong. In the Dyfi Valley there were a lot of adventure and bike-related activity providers, although the arts sector was also strong. Across all of the study areas it was difficult to find wildlife-related tourism enterprises.

**Table 3** Tourism enterprise categories and examples of enterprises in each category

Accommodation, pubs and shops	Sports activity enterprises	Arts, wildlife and tourist attractions
Hostel	Guided walking tour company	Theatre
Bed and breakfast	Livery yard (guided horse-riding tours)	Fungi foray organisation
Self-catering accommodation	Mountain bike hire business	Interpretation centre at historical site
Campsite	Cycling holiday business	Steam railway
Gift shop and museum	Outdoor pursuits centre	Rare breeds farm
Wooden-crafts shop	Trail riding association	
Pub providing food and accommodation		

**Figure 3** Discussion group with tourism enterprises



Questions were posed using a theme guide and groups met for around one and a half hours. Participants were compensated for their time, travel costs and information with an honorarium of £25.

Interview and discussion group conversations were recorded onto mini-discs, and were then transcribed verbatim and thematically analysed using a qualitative data software package (QSR NVivo).



# Research results: findings from interviews with planners and managers and discussion groups with tourism enterprises



## Introduction

This section presents the findings from the analysis of data collected from in-depth interviews with planners and managers and discussion groups with tourism enterprises. Unless otherwise stated, the findings documented relate to all three study areas and to participants from a broad range of sectors. Where differences have been identified between areas or sectors, this is specifically noted in the text. Excerpts from discussions are used to exemplify issues and positions raised.

## Perceptions of woodlands and their role in contemporary society

Planners and managers understood tourism to be an increasingly core area of forestry and felt that it would exert more influence in future woodland management. Some interviewees (and not exclusively those in environmental organisations) expressed the view that ‘forests’ (a term which was often equated with plantations) were ‘unnatural’ habitats that ran counter to environmental conservation objectives. Others, especially those in organisations with strong cross-sectoral links, discussed ‘forests’ and ‘woodlands’ in broader terms that recognised their social and cultural role, for example through their contribution to local identity and quality of life and in their value for recreation and tourism. These people wanted to avoid seeing uses as exclusive and stressed the importance of achieving a balance between functions. One interviewee discussed her concerns with taking a narrow view, particularly one based on environmental conservation objectives:

Biodiversity is important in theory and to protect what we have, but if all we’re doing is protecting this beautiful landscape that we have rather than building jobs into it, then all the people who live here can’t and we’ll just be left with the retired. And those that can get up and go, will get up and go. That’s called the ‘brain drain’.

**Planner/manager, Dyfi Valley**

Tourism enterprises understand woodlands to deliver a broad range of social, environmental and economic benefits. In the Great Glen, commercial timber production was seen as being central to forestry, while in the Suffolk Coasts and Heaths and the Dyfi Valley, recreation and tourism, along with the development of diversified and small-scale wood production, were seen as being the newly developing core activities. This reflects the dominance of small woodlands in relatively close proximity to urban centres of employment in the Suffolk Coasts and Heaths and the emphasis, particularly in the Dyfi Valley, on the role of the countryside in supporting small-scale rural livelihoods.

Like planners and managers, many tourism enterprises saw a distinction between what constitutes ‘forests’ and ‘woodlands’ (see footnote 1 on page 10 for information on the use of the term ‘woodlands’ in this report). Forests were seen as being coniferous plantations and were thought of as being more likely to be threatening,

monotonous, lacking in wildlife and inaccessible than woodlands. Woodlands were imagined to be composed of broadleaved and native species, and were perceived as being more open (accessible), providing a habitat for a wider range of species of wildlife and contributing more beauty and diversity to the landscape. As such, enterprises implied that currently woodlands were more (but not exclusively) appealing to tourists than forests. These perspectives regarding forests and woodlands have been found in other research, for example when exploring the quality of experience amongst recreational visitors to woodlands in Great Britain (NFO World Group, 2002).

## Values and uses of woodlands for tourism

Woodland tourism was seen by planners and managers as having social, environmental and economic benefits for visitors, local communities and tourism enterprises. They identified qualities that make woodlands suitable and sometimes favoured spaces for tourism activities:

- visual screening abilities
- noise absorption abilities
- extensiveness (especially in the case of publicly owned woodlands)
- robustness (especially in the case of coniferous plantations)
- ability for year-round use
- suitability for all-weather use

It was argued that woodlands are suited to accommodate tourism uses as they can:

- absorb relatively large numbers of people
- accommodate a wide diversity of uses, including physically destructive, noisy and/or visually intrusive uses (particularly in the case of coniferous woodlands)
- promote year-round tourism
- attract visitors regardless of the weather

The ability of woodlands to absorb large numbers of visitors as well as physically destructive and intrusive uses was seen as having value in mitigating the adverse environmental and social impacts of tourism in the countryside, for example trampling of ground flora, disturbance to wildlife and to local residents (Figure 4). As one interviewee explained:

I just see that, you know, when we get very busy on the coast and very packed; I just see that if there was more going on in the forest then we might be able to spread our visitors a bit more and therefore benefit the forest area and take some of the pressure off the actual coast as well.

**Planner/manager, Suffolk Coasts and Heaths**

**Figure 4**

Woodlands are valued for tourism because they can absorb large numbers of people and a wide diversity of uses



The year-round and all-weather appeal of woodlands to visitors, particularly during the spring and autumn, was thought to be valuable in maintaining a flow of customers to businesses throughout the year.

Tourism enterprises emphasised the economic benefits of woodlands and, especially, how they can motivate people to visit areas where they are present, extend the length of visits and prolong the tourism season. These values were discussed amongst all groups of tourism enterprises and across all of the study locations regardless of the nature and extent of woodlands in those areas. Examples of these values are provided in Boxes 2, 3 and 4.

**Box 2** Woodlands can motivate people to visit

An activity business providing guided horse-riding trips used trails in local woodlands to take visitors somewhere green, peaceful and where they could see wildlife – somewhere they could feel they had ‘got away from it all’. The alternative to using woodlands was to ride through agricultural fields and on roads. It was felt that this did not offer the quality of experience sought by their visitors. Woodlands were regarded as crucial in enabling them to attract people to their business.

**Box 3** Woodlands can extend the length of tourist visits

An accommodation provider in the Great Glen spoke about the value of wooded land in extending the length of stay of visitors to his business:

We tell them about which woodland they can walk in and suddenly they decide they are not going to stay one night, they are going to stay two or three nights, and from my point of view it's essential to have good woodland around, because the business is quality effective by the fact that we do have it.

**Accommodation enterprise, Great Glen**

Woodlands were seen to add to the diversity of things for tourists to do and so improve the quality of experience that tourism businesses and destinations can offer visitors.

**Box 4** Woodlands can extend the length of the tourist season

The seasonal colours of woodlands and their strong association with spring and autumn were felt to extend the tourist season:

There is a lot of photography that goes on and I think, with all the different colours, just ordinary touring people who would never get out of the car, sort of older people, you know, they are all taken on the colours and I think that it is selling an extended season as far as we are concerned.

**Accommodation enterprise, Great Glen**

Woodlands were felt to be especially valuable as they attract customers at times traditionally regarded as ‘shoulder’ seasons in the tourism industry.



Three features of woodlands were seen to be critical in the delivery of value to tourism enterprises:

- woodland imagery
- 'natural' and 'wild' spaces
- man-made facilities and services

**Figure 5** Woodland aesthetics can influence the tourism identity of an area



Woodland imagery was perceived to have an important role in influencing the identity of local tourism destinations and to have the ability to create aesthetically attractive tourist destinations (Figure 5). In the Dyfi Valley it was the sheer extent of forestry that was felt to promote 'green' imagery:

Some people have never seen that expanse of green and trees and it is useful for that benefit, and certainly the views straight out of my accommodation, I get people just stood hour after hour ... just looking at it. It could be much better, but it is certainly better than without them.

**Accommodation enterprise, Dyfi Valley**

Alternatively, in the Great Glen, it was the way in which the woodlands contrast with the mountains, lochs and waterways that was perceived to create an appealing tourism identity. In the Suffolk Coasts and Heaths it was the contrast and blending of trees with lowland coastal heath that was seen as vital in creating attractive imagery. It is not necessarily the size of woodlands that determines their impact on tourism; the way in which they integrate with the wider landscape is also important.



**Figure 6** The access that woodlands provide to the natural environment benefits tourism enterprises



The access that woodlands provide into what is perceived as 'natural' or 'wild' space was also regarded as beneficial to tourism enterprises. Participants described how plants and animals, the sights, sounds, smells and aesthetics of woodlands, could be used to stimulate beneficial experiences for their visitors or to promote the area and their enterprise to potential customers. The ability to explore away from trails into the 'wild' resource and the sense of excitement and adventure generated were especially important for activity providers (Figure 6). Box 5 contains quotes from enterprises talking about the benefits of woodland access.

**Box 5** The use and benefits of woodland access for tourism enterprises

Well, the wildlife, the heritage, and just to be in these woods, and certainly what our business is, is selling and telling people that, so we have the pine martens, the deer, the badgers, whatever, all up there.

**Accommodation enterprise, Great Glen**

To take a group of young people walking at night, in the forest, surrounded by trees, with the stars above, perhaps the full moon overhead ... and to have bats and owls and to hear things rustling and squeaking and the rest of it ... there is so much in the undergrowth, there is so much to see, there is so much to talk about, it starts a conversation going and all these other things ... they are a great trigger, a great catalyst for so much.

**Activity provider, Dyfi Valley**

What the woods offer us, is acoustically, because there is back-drop, a really good natural performance space in the clearing in which we perform, they are laid out with great backstage corridors as well ... people getting away from everything, and gathering together and having this quite spiritual experience in a remote woodland ... people are obviously very attracted to doing that in the forest.

**Arts enterprise, Suffolk Coasts and Heaths**

Man-made facilities such as walking and cycling trails, visitor centres and car parks, as well as services (for example, guided walks), are also important (Figure 7). A walking tour operator described the value of Forestry Commission car parks, toilets, picnic sites, interpretation and trails to his business. Alternatively, an accommodation provider described how she guided her visitors to these facilities through word-of-mouth conversations. Another used displays in the lobby of his hotel. Many were of the opinion that the standard of man-made facilities and services was strongly related to the condition and character of the woodland they were in. Developing and maintaining the appropriate balance between natural and man-made infrastructure so as to preserve feelings of 'naturalness' was considered to be critical in assuring the appeal of the facilities to visitors.

**Figure 7** Man-made facilities and services are another aspect of woodlands valued by tourism providers



Tourism enterprises exploit the qualities of woodlands in a broad range of ways. Uses can be classified into two categories:

- *Direct uses*: these take place in woodlands and include the use of natural aesthetics and materials (for example to provide forest theatre, adventure and handcraft activities), the gathering or viewing of plants and animals (for example to make items of food and drink, for arts and crafts, or as a means of education and learning), as well as the use of man-made facilities such as trails, interpretation, visitor centres and car parks for activities (for example to provide guided walking and horse-riding tours).
- *Indirect uses*: these utilise woodland characteristics, plants and animals, and infrastructure, but do not take place in woodland. They include the use of images, text and verbal references to woodland imagery, to products such as fungi and berries, and to man-made facilities and services such as trails, visitor centres and guided walk services.



The type of use made of woodlands was not necessarily related to the main service of enterprises. Instead, use reflected the broader range of products and services that an enterprise offered to customers (Figure 8). For example, the trend for innovative accommodation operators to provide packed lunches, evening meals, as well as guided activities such as walking and wildlife watching tours, meant that they were also sometimes direct users of woodlands:

We were talking about the berries, we utilise the sloes for sloe gin and brambles and that sort of thing. Again we kind of use these and tell people about them and they buy into it, kind of being out in the nature.

**Accommodation business, Great Glen**

**Figure 8** Plants and animals found in woodlands are used by tourism enterprises. For example a bed-and-breakfast provider in the Great Glen gathered sloe berries to make into sloe gin to serve to his guests



A couple of accommodation providers also described how they collected wood to heat their establishments (Figure 9) and how this added to the appeal of their enterprise to visitors:

You wouldn't believe the number of visitors who say, 'the best thing about this place is the smell', 'this reminds me of my childhood', which for them was great ... the whole building has that wood smell through it.

Accommodation enterprise, Dyfi Valley

**Figure 9** Firewood was gathered by some accommodation providers, who commented on the appeal of wood fires to visitors



Some activity providers used woodlands indirectly in their marketing literature. Most of the enterprises felt that there is great potential for woodland tourism values to be exploited through a greater diversity of uses. These are shown in Table 4, overleaf.



**Table 4** Tourism uses of woodlands with development potential

<b>Accommodation</b> Overnight stays in woodland, e.g. in forest holiday cabins, eco-lodges, yurts and Celtic roundhouses.
<b>Cultural, heritage and arts activities</b> Based on local and regional woodland culture, e.g. old and interesting trees, archaeology, activities such as coppicing, charcoal making, willow weaving and dying of textiles, forest theatre, story walks and folk-music festivals.
<b>Natural heritage activities</b> Based on birds, animals and plants associated with woodlands which have popular appeal, e.g. grouse, capercaillie, merlin and osprey, squirrels, deer, badgers, pine martens, wild cats, dormice, primroses, bluebells. Also broader woodland ecology.
<b>Sports activity and adventure activities</b> Cross-country running, safari trips, long-distance routes for walkers, bikers and horse riders, and sub-segments within core recreation activities – for instance, trekking, orienteering on horseback and carriage driving in the equestrian market. Also woodland drives, to enable access to ‘wild’ areas for less mobile people.
<b>Timber production activities</b> To convey information on land management for softwood and hardwood timber production, through activities such as tree planting and the viewing of tree felling and timber processing.
<b>Use of woodland as an environmentally sustainable product</b> Woodlands were seen as a means through which destinations could develop their ‘green’ credentials, e.g. through ‘wood for fuel’ initiatives.
<b>Woodland materials and products</b> To enable people to sample and purchase locally sourced products, such as wooden craft items, venison, berries, mushrooms and charcoal.
<b>Health and well-being activities</b> There was thought to be latent demand for health and well-being-based tourism activities, such as those based on spiritual healing and alternative therapies.
<b>Themed woodland holiday packages</b> For instance those focused on sport and adventure, health and well-being, wildlife watching, and foraging for wild foods.
<b>Events</b> For example rally driving. Events were regarded as important for introducing people to tourism destinations and encouraging repeat visits.

## Developing a collaborative approach to woodland tourism provision

Planners and managers felt that the forestry sector has a broad range of resources for tourism (see Box 6).

### Box 6 Tourism resources in the forestry sector

Natural and biological materials, e.g. land, trees, plants, fungi, birds, animals

- Man-made infrastructure and information materials, e.g. trails and visitor centres
- Services, e.g. guided walks
- Expertise (knowledge and skills) to manage land for leisure uses
- Funding/access to funding
- Human resources

Woodland managers, strategic planners and enterprises should be made more aware of all these assets. At present there is felt to be a focus on physical resources such as land and infrastructure at the expense of 'softer' assets, for example knowledge and skills in land management for tourism. A broader range of forestry resources should be strategically developed to add value to the tourism sector. Currently the Forestry Commission's approach to recreation and tourism provision is described as being 'low key', 'ad hoc', 'opportunistic' and 'patchy'. Some felt this was due to the project-orientated nature of funding, which meant that although there were some 'superb' initiatives on the ground, they did not seem to link to one another or cross-fertilise into other areas. It was felt that a more strategic approach to provision would provide a more coherent and logical woodland tourism product through the facilitation of:

- a broader and more thorough scoping and cataloguing of the resource
- assessment of the opportunities and impacts of developing products and services in particular places
- integration of products and services within woodlands
- linkages between woodland tourism products and services and the wider leisure sector
- the engagement of stakeholders with woodland tourism policy above the local level

Tourism enterprises were very positive about the forestry sector being more involved in leisure provision but, like planners and managers, they wanted involvement, particularly from the Forestry Commission, to be carefully considered so as to account for differing circumstances in local tourism areas.

In the Great Glen, businesses were concerned that the Forestry Commission should not be able to access funds unavailable to the private sector so as to provide products and services at a price that would undercut or even prevent private enterprise. As such, Forestry Commission activity should be based on the principle of 'fair competition'. In the Suffolk Coasts and Heaths, enterprises were concerned that pressure to derive revenue from tourism activities would lead to woodlands being overly developed with man-made recreation facilities, turning them into 'forest theme parks'. This, it was felt, would undermine the rural sense of place that tourism in the area is strongly reliant upon.

There was concern that pressure for the Forestry Commission to raise revenue from tourism activities would lead to enterprises being charged to use woodland and that some operators would be priced out of the market. Indeed, it is the blend between a series of non-commercial Forestry Commission facilities, for instance non-charging woodland trails, car parks and picnic sites, which often enables local entrepreneurs to develop commercial services, such as cafes, guided walks and horse trekking. Some non-profit-making organisations,

particularly in the arts sector, found the commercial focus of parts of the organisation (for example charging to use woodland for events) created barriers to their use of woodlands. Where issues of competition and commercialism were particular concerns, there was stronger support for the Commission to fill gaps in the market left by the private sector and to provide non-market goods and services that enterprises could 'tap into' to provide products and services to visitors.

Across the board, *partnership working* was advocated to enable the more effective utilisation of woodlands for tourism, enabling stakeholders (such as land managers, tourism organisations and enterprises) to share resources and support one another's activities. Collaboration would take varying forms according to the situation of different enterprises, organisations and local contexts. Here is an enterprise's view on joint working:

'Cos if you provide the resource, it will assist our business, and if I get people coming to the business, I pass some of it [resources] on to you as a thank you. It's partnership ... we work in co-operation to complement one another and there is no reason why it can't be mutually beneficial for everyone involved; everyone can be deriving extra value from the resource that is here, including forestry.

**Accommodation enterprise, Dyfi Valley**

Enterprises felt partnerships would enable better relations with the tourism sector and create:

- Greater diversity (breadth) of products and services available to visitors
- Increased depth (meaning) of tourist experiences
- Improved accessibility of products and services.

These benefits are discussed in Box 7.

#### **Box 7** Benefits of collaboration between tourism enterprises and woodland managers

##### **Increased diversity (breadth) of products and services**

An activity provider who, traditionally, had sold rides on a steam railway, described how woods added to the appeal of the area and were part of the experience they were using to bring visitors to their attraction. They had worked with the Forestry Commission (Forest Enterprise) and Woodland Trust to create a more attractive mix of tree species and provide a trail from the railway to an historical site in the woods, which was cleared and interpreted for visitors. The enterprise, in turn, produced a leaflet on the walk. This process of partnership working added to the diversity and therefore the strength and success of the product they were able to offer their visitors.

##### **Increased depth (meaning) of visitor experiences**

A craftsman discussed the potential value in being able to link the wooden products he made to the local woodland resource, for example information on its management and places for people to visit (Figure 10).

##### **Increased accessibility of products and services**

The tourism sector is dominated by small and medium-sized enterprises. The Forestry Commission could work as a unifying force to establish linkages between woodland tourism providers to create more accessible, coherent and higher-profile woodland tourism products.

There were a number of key activities where it was felt that partnership working would be productive. Collaboration to *plan and provide products and services* would be useful in promoting integration between woodlands with surrounding land uses and tourism products and services (Figures 11 and 12). Interviewees and enterprises, for example, spoke of the ways in which trails and facilities, such as car parks and interpretation in woodlands, could be physically linked to services like pubs, shops and accommodation within local communities. A greater use of rangers to meet and greet people in places outside woodland was also suggested. It was proposed that this would make woodland tourism products and services more accessible and also improve visitors' quality of experience.

**Figure 10** Local craftsmen may appreciate being able to link the wooden products they make to the local woodland resource



A lack of a sense of responsibility and/or feeling of control over the way in which the countryside is managed was also thought to be prevalent amongst tourism providers. Processes to enable their greater involvement in woodland planning and management were advocated. Enterprises themselves discussed how collaboration in this process could facilitate business development and entrepreneurship:

From our point of view, we could really develop our business by having more access for riding in the forest, because at the moment people come for dressage lessons which are very intense, but they like to mix that with something which is more recreational in the afternoon and if they choose to hack out, more access to woodland in the area would be beneficial, as we could make a different package and expand things.

**Activity enterprise, Dyfi Valley**

Participants also spoke about voluntary actions they had taken to help with the *maintenance of tourism facilities*. These included collecting litter and removing fallen trees from trails. They suggested that managers should work with local tourism enterprises to access a wider pool of resources to maintain recreation facilities, for example through the development of volunteer schemes.

Planners and managers saw tourism enterprises, along with other service providers such as public transport

operators, as having an important role to play in *marketing and providing information* on woodland tourism. Enterprises also stressed their importance in this role; as a shop owner in the Suffolk Coasts and Heaths commented: '*we talk to customers, we act as a tourist information service, we tell them places to go*'. The most popular method of marketing was word-of-mouth references to, for example, places to go to walk in woodlands, or the use of text or images referring to woodlands in marketing material. A smaller number of enterprises distributed or displayed leaflets on woodland tourism, and only a few were aware of the Forestry Commission website. For many, the marketing of woodlands, and their aesthetics in particular, was a subconscious rather than conscious activity, and it was only through the group discussions that they became aware that they used or referred to them to create positive business imagery and improved product and service delivery. A desire to utilise these assets more fully was expressed by many operators:

We have a large display area in the hotel where people are able to bring their literature for display ... and it always contains information on forest walks and I would welcome more information along those lines, the views and atmosphere of being in the forest.

**Accommodation enterprise, Dyfi Valley**

To increase awareness and knowledge amongst tourism providers, planners and managers felt that the Forestry Commission ought to raise awareness of the role that woodlands and their managers play in delivering tourism products and services:

If it is going to be a success [forest tourism], it is really the businesses which will have a lot of work to do in the promotion ... a lot of it is down to word of mouth ... familiarisation is the big thing. If it's going to be developed, it will take staff and businesses to actually go and do the route, try out facilities and actually have first-hand experience.

**Planner/manager, Great Glen**



**Figure 11** Partnership working between forest managers and tourism enterprises was advocated



**Figure 12** Participants felt that partnership working encourages more effective planning, promotion and maintenance of woodlands for tourism



Participants from the economic and rural development sectors pointed out that the Forestry Commission could do more to explain to businesses how they might benefit from woodlands and what the organisation might offer them should they wish to capitalise on these possibilities:

I don't really know what it might do as an organisation for the tourism businesses locally. What it wants to do, and what it can do, and what it might wish to do in the future, and whether it has really thought about it to the extent that it knows ... Is there a connection between tourism and forestry, and if so, is it embodied in a leaflet somewhere? ... I don't know.

**Planner/manager, Dyfi Valley**

Partnership working to facilitate the transfer of *knowledge and skills in land management for tourism* were seen as being something for the Forestry Commission to develop. Particular areas of expertise within the Forestry Commission that they might focus on were identified as:

- interpretation
- installation and maintenance of high-quality infrastructure
- reducing conflict between recreational user groups
- providing for walking and mountain biking
- management of archaeological sites for tourism

### **Suggestions for forest management**

While woodland management was seen to have increasing benefits for tourism, a number of other suggestions were made about how to better tailor forestry activities for the leisure sector:

#### **Increase communication between management 'teams'**

Lack of coherence between woodland management functions, described by one interviewee as 'resource compartmentalisation', was seen to create conflicts in management and loss of potential benefits for tourism. More collaborative working between foresters was proposed in order to develop a fuller understanding of how activities might impact on one another and approaches to the mitigation of negative impacts as well as to stimulate ideas for woodland tourism development.

#### **Change behaviour of harvesting contractors**

A lack of understanding amongst harvesting contractors about tourism uses of woodlands was felt to result in negative behaviour such as the dumping of litter and damage to trails. Improved communications with contractors to guide them on how to deal with tourism facilities and users before, during, and after harvesting operations, as well as monitoring to ensure their adherence to such guidelines, were suggested.

#### **Promote landscape design and diversification of tree species**

Landscape design principles were widely acknowledged as providing improvements for tourism. Restructuring with broadleaved and native tree species (particularly to buffer and create semi-permanent recreational access routes), the shaping of woodland edges (for example, to prevent wind-throw), less dense planting and the creation of more open space under the canopy, were specifically mentioned as providing benefit. It was felt that if woodlands are to achieve their potential as tourism resources, there needs to be an improved focus on understanding and promoting landscape design for tourism in forestry.

Woodlands, and in particular Forestry Commission plantations, were seen as isolated blocks within the wider landscape (although it was noted that in some areas work had begun to blend trees with surrounding habitats). One interviewee referred to this as 'the problem of forestry being islands'. The desirability of blending and linking wooded and non-wooded land by altering the structure and composition of woodland edges and creating access and trails to link habitats was discussed:

[The Commission] has a resource but that resource doesn't stop at its boundaries, it needs to look beyond its boundaries ... again, we are talking about the problem of forestry being islands.

**Planner/manager, Dyfi Valley**

The use of clear-fell and a lack of attention to the removal of wind-blown trees from visible edges and recreation areas were also criticised. It was suggested that woodlands could be made more aesthetically appealing and interesting to tourists in terms of colour, shape and form. Diversification of tree species was seen as a way of promoting supplies of domestically produced hardwoods, enabling craftspeople to produce items from locally sourced hardwoods and run courses on traditional woodworking skills. The planting of broadleaved species could create improved habitats for wildlife and thus wildlife tourism activities.

### **Increase funding for the maintenance of tourism infrastructure**

Inadequate resources to provide and maintain tourism facilities in publicly owned woodlands were strong concerns:

The big problem is that the Forestry Commission is so vastly under-resourced that you can't think of forestry as an adjunct to your business; like a forest trail, if it takes two years for them to find the resources to clear the trees from it, you've got nothing reliable that you can point them [visitors] to.

**Attraction provider, Dyfi Valley**

This led providers to question the ability of the forestry sector to commit to tourism provision and to suggest that the maintenance of tourism infrastructure should have more resourcing.

### **Improve marketing and information provision**

Planners and managers questioned public awareness of the 'open access' status of Forestry Commission woodlands and suggested that there was confusion about the role of the Forestry Commission in tourism provision. It was felt that woodlands should be more strongly promoted as open access resources for public use and benefit. It was suggested that a more thorough understanding of, and approach to, tourism marketing and information provision in the organisation would facilitate the use of a wider and more effective range of organisations and methods; for example, tourism board marketing initiatives, short-notice flyers, glossy leaflets and email group messages, to deliver appropriate messages and information.

Although it was recognised that systems were in place to give tourism enterprises advance warning of woodland closures, the benefit of developing more robust and comprehensive information systems, for example through the development of databases and email groups, on day-to-day management issues was strongly voiced.

### **Increase provision of access and infrastructure**

New access routes into, within and through woodlands, linking features such as interesting trees, archaeology, water features and adjoining public access land, were advocated, as were trails to link tourism attractions with surrounding woodlands or to have paths within closer proximity to establishments such as hotels, pubs and activity centres. In addition, the sensitive development of man-made infrastructure such as trails, interpretation, toilets and changing facilities throughout woodlands was also proposed.

## Summary of findings

Planners and managers see woodlands as being able to add to the social, environmental and economic value of tourism. These benefits are strongly associated with the technical qualities of trees, such as their ability to provide noise absorption, visual screening and protection from adverse weather conditions. They are also linked to the ability of woodlands to create attractive landscape aesthetics.

Enterprises stress the economic value of woodlands for tourism, highlighting their ability to attract visitors to tourism areas, prolong the length of time people spend in those locations, and lengthen the tourist season. These values derive from the visual imagery of woodlands, their 'natural' resources, 'wild' spaces and man-made facilities and services. Uses of woodlands are complex and reflect the broad range of products and services that each enterprise offers, rather than their core product or service. A wide range of tourism activities were put forward for development, for example those relating to health and well-being, accommodation provision, as well as the experience and use of natural products such as fungi and berries.

The forestry sector is perceived as having a broad range of resources for tourism development. There is, however, a need to promote awareness and utilisation of these resources amongst woodland managers and tourism stakeholders. Closer partnership working was proposed as a means to achieving this. Enterprises emphasised the importance of collaboration in increasing the accessibility of products and services and in adding to the depth and diversity of visitors' experiences. Product planning and delivery, marketing and information provision, as well as training in land management for tourism, were seen as key areas where joint working should be pursued.



# Conclusions and recommendations



## Conclusions from the project

As a result of this research, the following conclusions were reached.

- **Woodlands influence the social, environmental and economic performance of the tourism sector**

This research has revealed how forestry management practices can affect the success of tourism enterprises and the competitiveness of the leisure sector through their influence on tourism area identities, the diversity and depth of visitors' experiences, and the accessibility of products and services. This corroborates and adds qualitative depth to the findings of previous work (see, for example, Hill *et al.*, 2003; Slee *et al.*, 2003) which found that woodlands can represent important components of countryside capital. This suggests that woodlands could be used to influence the social and environmental impacts of leisure activities, for example by providing places where large numbers of visitors, enjoying a wide diversity of uses (including physically destructive, noisy and visually intrusive activities), can be channelled and absorbed. Providers feel that the impacts that forestry has on tourism have much to do with the integration of forestry resources with surrounding land uses, businesses and communities, as well as with the extensiveness of woodlands in the landscape.

- **Woodland tourism products and services are diverse, as are their providers**

The tourism products and services associated with woods are diverse. They are based around sports and adventure activities, arts and crafts events, as well as ventures aimed at promoting public education, health and well-being. These utilise 'natural' woodland products and aesthetics, as well as man-made facilities. Strong emphasis was placed on enabling visitors to experience and use locally sourced products from woods, such as venison, charcoal and wooden craft objects.

In turn, a wide range of enterprises and organisations provide woodland tourism facilities and services. These include the owners of bed-and-breakfast accommodation, guided walking and cycle tour operators, as well as wildlife farms and centres interpreting local heritage. The uses made of woodland by these operators reflect the broad range of products and services they offer rather than their core product or service.

- **Partnership working and landscape-scale approaches to management are perceived as being an effective way of utilising resources to promote growth in woodland tourism**

Woods have considerable potential for development as tourism attractions and the forestry sector has a broad range of resources available to support tourism provision. Partnership working is seen as an effective way of promoting open and participatory approaches to woodland tourism planning and delivery, and of enabling a fuller consideration of local opportunities and sensitivities for leisure developments. Tourism providers advocate that this collaborative approach to provision should occur at the *landscape scale*, enabling the development of *tourism and recreation networks* to integrate the resources of the natural landscape and local communities for tourism provision, marketing and maintenance. This, it was argued, would promote the success of tourism businesses by increasing the accessibility of products, and extending the depth and breadth of visitors' experiences. Landscape-scale approaches to tourism provision would also provide the opportunity to scope land uses and local communities strategically for different leisure activities (Figure 13). This could open up opportunities for increasing the social and environmental acceptability of tourism by enabling leisure activities to be channelled into areas, for example woodlands, where their noise, visual and physical impacts are better able to be absorbed.

**Figure 13** Landscape-scale approaches to land management might be an effective way of realising opportunities for woodland tourism



## Recommendations for increasing the contribution of forestry to tourism

The actions recommended by this research are set out below. Taking them forward is likely to require individuals or organisations to take specific responsibility for their planning and delivery. Piloting a developmental programme at a regional or sub-regional scale should be considered as a preliminary step to building capacity and developing skills and wider understanding.

### Recommendations for policy and practice

#### Promote and enable innovation in the use of woodlands for tourism

Processes and resources to encourage, identify and realise innovation, entrepreneurship and business development in the woodland tourism sector are lacking. Ideas for woodland tourism products and services therefore remain unexplored and unrealised. Given the importance placed by forestry policy on tourism as a means of rural economic diversification, policies and practices to promote innovation and business development through the use of woodlands for tourism should be examined and promoted. This should include the Forestry Commission, in partnership with other stakeholders, developing a mechanism to promote innovation and deliver the appropriate level of resources for this task.

#### Increase the awareness and utilisation of woodland tourism values

Some providers felt that they and others lacked an awareness and understanding of the role of the forestry sector in tourism provision. There is a need for woodland managers to develop clear and effective processes through which information on forestry and tourism is made available. This might involve raising awareness of the Forestry Commission website, establishing familiarisation events for tourism operators, or clarifying the position regarding leaflet provision to enterprises.

To encourage tourism providers to identify opportunities for development, there is a need to promote the values and uses of woodlands for tourism (for example their ability to create positive enterprise imagery) and how these translate into benefits. This guidance could be coupled with illustrations of the kinds of relations (and resource sharing) that might be developed between land managers and tourism providers.

Innovative case studies and guidance might include best practice in:

- the use of forests in autumn, winter and spring
- the utilisation of woodland plants and animals
- the use of positive imagery to develop woodland tourism brands
- the use of wooded land as a tool for leisure management, for example how its physical robustness, noise absorption and visual screening qualities can be used to increase the social and environmental acceptability of tourism
- how to assess soil and terrain for physical robustness and suitable tourism uses
- how to design woodlands to maximise their visual screening and noise-absorption qualities



### **Map and develop knowledge and skills in tourism**

The forestry sector, and in particular the Forestry Commission, was regarded by many participants as having considerable knowledge and skill in land management for tourism, particularly in interpretation, provision of mountain biking and walking trails, and the mitigation of conflicts between recreational user groups. Work to map, record and collate such knowledge and skills and disseminate them to those wishing to develop countryside tourism facilities and services should be taken forward. Areas of expertise where translation activities might focus are:

- interpretation
- installation and maintenance of high-quality infrastructure
- reducing conflict between recreation user groups
- providing for walking and mountain biking
- management of archaeological sites for tourism

In addition, an analysis of the tourism skills gaps of woodland managers and suggestions for ways of proactively building tourism knowledge and skills within the forestry sector should be pursued.

### **Develop good practice in landscape design for tourism**

Tourism providers discussed how well-designed woodlands could promote attractive visual imagery, linkage with adjoining land uses, the availability of biological products and appealing internal ambience and aesthetics. They also acknowledged the value of landscape design in creating corridors of trees to buffer and create semi-permanent access routes and recreation areas, increased provision of space within woods, and the shaping of woodland edges (especially to prevent wind-throw). It was proposed that landscape design should be used more extensively to provide these and other benefits (for example the utilisation of the visual screening and noise-absorption qualities of trees). With this strong endorsement of the value of landscape design for the leisure sector and with a clear perception of a need to apply its principles more vigorously, work to collate good practice in landscape design for tourism should be pursued.

### **Develop guidelines and processes for scoping the impacts of timber production on tourism**

Planners, managers and tourism enterprises voiced concern and frustration with timber production activities. Specific aggravations were the length of time that areas are closed for felling, litter being left on site by contractors, and damage to vegetation and facilities. Processes to enable timber production activities to be scoped for impacts on tourism, and guidelines on best practice with regard to the mitigation of negative impacts, might be considered. The provision of advice for contractors on good practice is suggested, along with systems to monitor their performance.

### **Take a strategic and inclusive landscape-scale approach to tourism provision**

To promote a more holistic and integrated utilisation of forestry resources for leisure provision, a landscape-scale approach to the development of woodlands for tourism should be investigated. It is anticipated that this would increase the sustainability of tourism by:

- *improving the quality of experience for tourists* by enabling them to observe more diversity and gain more meaning from their visits
- *enhancing the economic success of tourism enterprises* through the facilitation of better access between tourism facilities and providers
- *improving the social and environmental acceptability of tourism areas* by guiding visitors away from tourism hotspots and sensitive natural environments
- *promoting the efficient use of public money* by identifying situations where infrastructure might easily be shared between recreation sites and providers



Within this approach, a focus should be placed on strategy, inclusion and integration so as to facilitate a thorough scoping and cataloguing of resources for tourism. It would also enable an emphasis to be placed on developing linkages between tourism products and services according to themes or places.

Particular uses that might be strategically developed include accommodation and activities based on sports and adventure, wildlife watching, heritage and culture, arts and crafts, land management and woodland products, health and education.

**Address the availability and sustainability of resources for the provision, marketing and maintenance of recreation infrastructure**

Shortages in the supply of funding to enable providers to work with land managers to supply recreation infrastructure, and a lack of finances for the maintenance of facilities were especially strong grievances. An overly project-focused approach to funding was felt to lead to fragmentation between potentially synergistic tourism products and services. The level and allocation of finance required for sustainable facility provision and marketing should be considered.

**Take a holistic view of the resources of the forestry sector for tourism and a broader conceptualisation of woodland tourism providers**

The diversity of values attached to woods by tourism operators shows that there is a need to move away from narrow conceptions of the links between woodlands and tourism that popularly focus on man-made products and services. This approach advocates woodlands as tourism resources in a more holistic sense and suggests that land managers and planners should be encouraged to think more broadly about woods as resources for tourism. The importance of land managers scoping forestry operations for impacts on woodland imagery, availability and quality of natural areas and biological products, as well as man-made products and services, is emphasised. A stronger focus on landscape design and silvicultural practices would enable management to influence the presence of natural products such as fungi, plants, trees and animals, as well as improving aesthetics, at a landscape scale and from inside the resource.

Similarly there is a need to acknowledge a wider range of players (for example, accommodation, activity and arts providers and woodland managers) as tourism providers and as stakeholders in public woodland management.

**Promote the importance of considering the ways woodlands are developed for tourism**

Tourism enterprises make diverse and complex uses of woodlands. To aid their success, they could establish new linkages with the products and services in woods, for example trails between attractions and woodlands, or provide information on land management and recreation activities to their visitors. To achieve these objectives, enterprises stressed the importance of partnership working between themselves and land managers to share a broad range of resources (rather than just financial ones). Opportunities therefore exist for the forestry sector to seek partnerships with a broader range of stakeholders to provide, market and maintain tourism products and services, and to distribute the costs and benefits of tourism provision more widely.

Foresters need to focus on facilitating the exchange of information between land managers and tourism operators, and on bringing together managers and operators (and thus products and services) into effective collaborations. Starting points might be the development of comprehensive land-use monitoring and information systems and the inclusion of tourism enterprises within more open and transparent approaches to tourism planning.

## Recommendations for action

This research indicates a number of further actions:

### **Identify social and economic clusters associated with woodland tourism provision**

There is a need to promote partnership working between land managers and tourism providers and to investigate the roles that are taken by different actors (for example, forestry organisations, other strategic players, and tourism enterprises), the forms of relations between those players and the resources shared. This should facilitate the identification of social and economic clusters and identify areas where intervention would give adequate returns. Within this work the social and economic efficacy and impacts (for example in relation to spread of costs and benefits, extent of entrepreneurship and social capital formation) of different forms of partnership should be assessed. Given the strength of feeling of tourism providers about the potential for collaboration in relation to tourism planning, provision, marketing and maintenance, these areas of activity might form particular foci of future studies.

### **Develop a strategy for innovation within woodland tourism**

A strategy to promote innovation in woodland recreation and tourism is required. This should be underpinned with research on the extent and nature of innovation in woodland tourism. An appraisal should take place of the suitability to forestry of policies and tools aimed at promoting economic development within other sectors. This would help determine the need for specific policies and practices to promote innovation and growth within woodland tourism.

Case studies (domestic and international) illustrating linkage and development of good practice in realising innovation in woodland tourism and analysis of the role of different actors (for example, forestry and other planners and managers, land managers, and businesses) should also occur. This would enable consideration of the current and potential role of the Forestry Commission in progressing and enabling innovation. Work in this area could be linked to that on social and economic clustering within the woodland tourism sector.

### **Build landscape-scale planning for tourism development into state forestry and forestry grants**

Landscape-level approaches to spatial planning and natural land-use management are receiving increasing attention from policy makers, academics and practitioners within the UK and Europe. The European Landscape Convention is an important influence. The convention seeks to promote the utilisation and protection of landscapes to deliver a broad range of social, economic and environmental benefits. This requires an increasingly holistic conception and approach to forestry and land-use planning, integrating a broad range of stakeholders, issues, policies and disciplines into sustainable land-management plans (Herlin, 2004). There is a need to enable land-management and design processes to act as a means of achieving holistic and integrated approaches to tourism development.

### **Research woodland management cultures and practices**

Some participants felt that woodland management practices were disjointed and that improved communication and interaction between land managers, particularly at the local level, would be beneficial. As well as providing the opportunity to mitigate the negative effects of woodland management, collaborative working would assist in the identification of new opportunities for woodland-based leisure development. Research working with land managers to understand current working practices, such as the level of joint working and the effectiveness and opportunities for the development of working procedures to improve the delivery of woodland tourism, should also be undertaken.

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