

The New Forest Tour

Product Marketing Plan

2007



www.thenewforesttour.info



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Annex 1 – 2007 Marketing Action Plan

1. Introduction

The New Forest Tour (NFT) is an open top bus experience following a circular route within the New Forest National Park. The route of the tour includes key settlements, visitor attractions and accommodation providers and seeks to provide a diverse experience including open forest and the coast.

In addition to the bus experience, customers are offered the opportunity to ‘hop on and off’ the bus and undertake further exploration of the New Forest on foot or by cycle, before picking up a later bus to complete their journey.

The service is provided as a partnership between Solent Blue Line, Hampshire County Council, New Forest District Council and the New Forest National Park Authority.

The NFT began operating in 2004 and carried 4000 passengers. This increased to 5000 in 2005 and following significant product development, 2006 passenger numbers reached 9000. The growth in the customer base can be attributed to doubling the capacity through the introduction of a second bus and increased awareness of the NFT.

The service is seasonal and for 2007 will operate for 100 consecutive days commencing 26 May. Opportunities for using the bus to generate new business outside of the 100 day period will be investigated.

Although the NFT is the only service of it’s kind operating in the New Forest, it both compliments and competes with other visitor attractions, and other recreational activities, for visitors time and money.

Market research has for the past two years been commissioned through the organisation ‘tourism on board’, however, small sample sizes mean that unfortunately little confidence can be taken from the results. Despite this, certain trends are apparent and product development must respond to customer feedback, and ensure in particular that the quality of the experience warrants the price.

For 2007, a coordinated and marketing campaign will focus on raising awareness of the product throughout the New Forests’ visitor marketplace. Responsibility for the delivery of the marketing campaign will be shared between the partnership organisations.

1.1 Mission Statement

The NFT will provide the flagship car free tourism experience in the New Forest National Park and will continue to grow and improve by responding to the needs of the market.

2. Situation Analysis

2.1 Current Market Position

Product specific market research to date has been undertaken by the organisation 'tourism on board' which for 2005 and 2006 involved questionnaire distribution to the NFT customers. Unfortunately relatively small sample sizes were returned which questions the confidence of this research.

More general market research was undertaken in 2005 in the form the New Forest Visitor Survey prepared by Tourism South East.

2.2 Product

NFT provides a unique visitor experience aimed at serving the day visitor, overnight visitor and long stay visitor to the New Forest. In 2006 the NFT ran at 8% capacity based on patronage of 9016 compared to maximum patronage of 112000.

The NFT runs from May until September for 100 consecutive days and uses 2 'nearly new' double deck open top buses, each with a capacity of 70.

Tours depart hourly and each NFT tour runs for 2 hours and follows a set 22 mile route around the southern part of the New Forest, taking in the settlements of Lyndhurst, Brockenhurst, Lymington and Beaulieu.

Since launch in 2004, the NFT has towed a trailer providing capacity for the carriage of cycles. The success of this option has been mixed and the number of cycles carried has not been recorded. Customer feedback suggested that the cycle trailer affected the quality of the ride and in addition, this limited driver choice due to extra licence requirements for towing a trailer.

The route of the NFT includes:-

- Lyndhurst
- Hollands Wood Campsite
- Brockenhurst village, including rail station
- Lymington, including rail station
- Beaulieu village
- Beaulieu National Motor Museum
- Exbury Gardens
- Denny Wood Campsite
- Lyndhurst

Each of the above offer opportunities for customers to get on or off the service, as well as other more rural locations providing it is safe to do so.

2.3 Place

Tickets for the NFT are currently sold on the bus and, since 2006, through Visitor Information Centres at Lyndhurst, Lymington and Ringwood. For the 2006 season some 9% of tickets were sold through VIC's. This is considered a welcome additional channel for ticket purchase and will be continued in 2007.

A facility to purchase tickets online does not currently exist however this is something that is highly desirable for the 2007 season. Online ticket sales will also meet market expectation and will bring the tour online with an increasing number of visitor attractions in the New Forest which offer this facility, such as the National Motor Museum at Beaulieu. In addition, a number of other open top bus tours across the UK currently offer an online booking facility. Some examples of such tours can be viewed through the [CitySightseeing](#) website.

2.4 Price

The 2006 season offered the following prices to the market:-

Adult £9.00
 Child (5-15) £4.50
 Family (2 Adults + up to 3 Children) £22.50

When setting pricing levels, those of other open top bus tours were assessed and analysed. The results are shown below.

In comparison to other open tour tours, the NFT compares favourably.

Table 1:- Price and duration comparison of open top bus tours

| Product | Cost of Adult ticket (2006) | Duration |
|------------------------|------------------------------------|-----------------|
| Bath | £9.50 | 50 minutes |
| IoW Open Top Tour | £9.00 | 2 hours |
| London (Bug Bus) tour | £20.00 | 2 hrs |
| Discover Leicester | £6.00 | 1hr 30 minutes |
| New Forest Tour | £9.00 | 2hours |

An analysis of the pricing of other visitor attractions in the New Forest was also undertaken and the results shown in the table below.

Table 2:- Comparison of New Forest visitor attraction prices

| Visitor Attraction | Cost of Adult ticket (2006) |
|----------------------------------|------------------------------------|
| Beaulieu Motor Museum | £14.50 |
| Paultons Park | £15.50 |
| Exbury Gardens | £7.50 |
| Country Lanes Cycle Hire (1 day) | £14.00 |
| New Forest Tour | £9.00 |

2.5 Promotion

Since its launch in 2004, a number of promotional initiatives have been used to market the NFT. These have ranged from product specific leaflet promotion through to paid advertising and high profile annual launches.

In 2006 the NFT followed the [City Sightseeing](#) brand, using a red and blue livery and key strap line of 'The New Forest Tour'. In 2007 the NFT will move away from City Sightseeing, and create a more local brand in line with other open top bus tours operated by Solent Blue Line. (at the time of writing

Promotion in 2006 included the following:-

- Product specific posters/leaflets distributed to tourist information centres.
- A pack of 12 walking and cycling routes designed to add value to the customers NFT experience.
- Paid advertising in the New Forest Visitor Guide
- Coverage on the New Forest National Park Public Transport Guide and Map – widely distributed across Hampshire.
- Joint marketing with visitor attractions en route.
- Advert in 'Scenic Britain by Bus'.
- NFT route shown on Forestry Commission cycle map.
- Dedicated point of sale displays in VIC's.
- Some website content though www.CitySightseeing.co.uk , www.thenewforest.co.uk , www.hants.gov.uk and www.solentblueline.com .

Due to insufficient market research to date, segment or sector specific marketing has not been possible. Instead, marketing materials and distribution channels have been kept generic until information becomes available to support targeted marketing.

3. Market Overview

Although product specific market research is limited, useful research does exist in the form of the New Forest Visitor Survey (2005) and Tourism on Board's 2006 survey of open top recreational bus tours in the UK.

New Forest Visitor Survey

The total visitor volume using the New Forest National Park is estimated at 13,555,400 visitor days.

Total spending associated with visitor spend is estimated at around £107.6 million. Taking into account 'leakage', it is estimated that spending within the New Forest on leisure trips amounts to £72 million.

Key findings:-

- 11% of visitors spend money on entertainment (attractions, tours etc)
- 50% spent money on travel and transport (fuel, fares & parking).

- 22% of all visitors would consider using a park and ride facility.
- 36% of visitors staying in the New Forest would consider using a park and ride facility.
- 11% of local day visitors would consider using a park and ride facility.
- 96% of all visitors staying in the National Park used a car or private vehicle as the main mode of transport to travel to their accommodation base.

Table 3 :- Percentage of visitors travelling to an area by private car

| Destination | % travelling by car | Source |
|-----------------------------|----------------------------|---------------------------------------|
| South Downs AONB | 84 | Southern Tourist Board (2003) |
| Dartmoor National Park | 90 | Liston-Heyes & Heyes (1999) |
| Chilterns AONB | 77 | Southern Tourist Board (1999) |
| Peak District National Park | 87 | Heart of England Tourist Board (1998) |
| New Forest | 96 | Centre for Leisure Research (1995) |

Consideration should also be given to why people visit the New Forest and what activities they choose to undertake. The table below provides snapshot of the top three primary reasons for visiting the New Forest.

Table 4 :- Reasons for visiting the New Forest National Park

| Main Purpose | % of all surveyed |
|---|--------------------------|
| Walking (Short walk, long walk, dog walk) | 54 |
| Relaxing/enjoying views/picnicking | 13 |
| Visiting a town or tourist attraction | 9 |

The table below shows the levels of customer base for visitor attractions in, or close to the boundary of, the New Forest National Park. The table makes no suggestion that the NFT should be in any way matching visitor figures of the other listed destinations.

Table 5 :- Visitor numbers by attraction

| Visitor Attraction | Number of customers |
|--|----------------------------|
| Exbury Gardens | 138,685 (2004) |
| Beaulieu | 318,531 (2004) |
| Bucklers Hard Historic Village, Beaulieu | 80,000 (2003) |
| Paultons Park, Romsey | 550,000 (2004) |
| New Forest Tour | 9000 (2006) |

Source:- Hampshire County Council Tourism Facts & Figures (2005)

Tourism on Board research into recreational open top bus tours.

The aim of the Tourism on Board project is to improve the performance of recreational public transport services which serve the leisure and tourism market, through research into the needs of current and potential users.

In 2006 research covered some 14 recreational public transport services across the UK and analysed 1478 responses.

The key results were:-

- 48% of respondents are over 56
- 88% of respondents were not accompanied by a child
- 49.9% of respondents did not own a car
- 40% of respondents found out about the bus through a tourist information centre, nearly 25% found out about the bus through the internet.
- 36% of respondents used the service to access walking opportunities.

2.7 New Forest Tour Operating Arrangements

The roles of the partners involved in the NFT are described below:-

Hampshire County Council

- Financial support provided through £100 000 capital contributions over 3 years (2006-2008) to secure the use of the buses used on the NFT for 100 days per year.
- Officer support for marketing/operation/coordination

New Forest District Council

- Financial support provided through £15 000 per annual revenue contribution over 3 years (2006-2008)
- Officer support for marketing/operation/coordination

New Forest National Park Authority

- Financial support provided through £15 000 per annual revenue contribution over 3 years (2006-2008)
- Officer support for marketing/operation/coordination

Solent Blue Line

- Bus provider and operator
- Support for marketing and coordination

A notional value has been prescribed which assumes that revenue costs for the NFT are £48 000 over a 100 day season. This equates to £480 per day to run 2 buses. Cost per bus per day is £240. As described above, £30 000 of this £48 000 is provided by the New Forest National Park Authority and New Forest District Council. The shortfall in revenue funding is made up by Solent Blue Line, who also keep any profit should revenue from the service exceed £18 000 per annum.

3. SWOT Analyses

3.1 Strengths

- Product has wide ranging appeal and is suitable for all visitor market sectors.
- Set route allows for an easy to understand timetable.
- Presents a sustainable, car free alternative for visitors to the New Forest
- Service has been running for 3 years so is becoming an established product offering.
- Cycling and walking routes en route have been developed to add value to the visitor experience
- Nearly new buses promote concept of quality and reliability
- Provision of cycle carriage
- Provides integration with other public transport services – bus, rail and ferry.
- Improved service reliability has led to improved customer confidence a better quality product.
- NFT is a visitor attraction in it's own right

3.2 Weaknesses

- Insufficient market research impacts upon marketing decision making.
- Inconsistent marketing activity to date, including lack of established website and inconsistent branding.
- Variable quality of on board commentary is a recognised gap in the product offering.
- Lack of useful marketing information from bus operator.
- Product does not 'breakeven'.
- No online ticket purchase facility.

3.3 Opportunities

- Increasing consumer awareness of environmental issues leading to an increased demand for 'car free tourism' experiences
- Further integration with existing public transport services, ferry, train and public bus.
- Settlements, accommodation providers, campsites and visitor attractions served en route.
- NFT can also be used as a local bus using reduced fare structure for 'part journeys'
- New business opportunities for 'out of season' tours, potentially involving the education sector, corporate 'team-building' events, old peoples homes etc.
- Coordinated marketing activity through partner approved marketing plan.

3.4 Threats

- Until commercially viable, the long term future of NFT remains unclear as service relies on partner capital and revenue funding support.
- Discontent from other parts of the New Forest not served by the NFT.
- 95% of trips to the New Forest are made by private car.
- Increasing visitor pressure on the New Forest likely to arise from South East and South West plan housing allocations.

3.5 Key Issues and Opportunities

Key Issues

The NFT service is guaranteed in its current format until September 2008 season. After this time the future of the service is unknown.

Marketing strategies must be targeted toward increasing the NFT customer base, thus ensuring a more robust case can be made for the long term viability of the product.

Key Opportunities

Although the service needs to nearly double patronage before any notional 'break-even' point can be discussed, there are several measures that can be developed which could lead to such an increase, opportunities such as a dedicated website and online ticket sales would assist with this.

Key opportunities also exist in pursuing further marketing with accommodation providers, most notably camping and caravanning sites located on the route of the NFT. 31% of all staying visitors in the New Forest National Park stay in camping and caravanning sites and as such there is potential to increase patronage from this market sector.

Key Threats

The key threat comes in the form of the long term viability of the service as the current service is only guaranteed until the end of the 2008 season (September).

Partner negotiations to extend the service beyond this period have yet to commence but the ideal scenario would be for patronage to grow to a level at which the service can become commercially viable beyond 2009.

4. Competitor Analysis

There are few, if any products which can be defined as direct competitors, however, there are a broad range of indirect competitors which should be considered.

Essentially, the NFT provides a visitor experience which may compete against other visitor attractions for paying customers and also against the natural qualities of the New Forest for visitors undertaking free recreational activity.

The NFT has already progressed joint marketing initiatives with two visitor attractions (Beaulieu Motor Museum and Exbury Gardens) from which all partners have seen customer growth.

More focussed market research in 2007 will help to provide further data on competitors.

5. Assumptions

This marketing plan assumes the following:-

- The NFT will continue to operate under the terms of the current contract until the end of the summer season 2008.
- There will be moderate growth in tourism in 2007. (Source: Visit Britain)

6. Marketing Objectives

- To increase ticket sales by 50% for the 2007 season
- To increase revenue generation by 50% for the 2007 season
- To make 60% of visitors to the New Forest National Park aware of the New Forest Tour.

7. Strategy

7.1 Overview of Strategies

NFT should seek to maximise the opportunities from the New Forest visitor marketplace with a rebranded product using a combination of hard copy promotion, joint promotional activity and the internet.

The following section describes each of the different strategy strands in more detail. The NFT Marketing Action Plan listing specific marketing initiatives is included at Appendix A.

7.2 Target Market

The target market is all visitors to the New Forest National Park. Research outlined in section 3 (Market Overview) suggests that greater usage of the NFT may be expected from those 'over 56' years old, and that staying visitors are more likely to use the NFT than local day visitors.

2007 will present opportunities for learning more about the various target markets and the 2008 marketing plan will reflect the outcomes of this research.

In conclusion therefore not enough is known about the current customer base in order to make sector or segment specific marketing decisions in 2007. Generic marketing material and distribution strategies based on assumptions must therefore be followed in 2007.

7.3 Branding Strategy

Discussions on branding are in progress with other partners. A draft bus livery is being presented to partners by Solent Blue Line in early February. Partners will have the opportunity to comment on the proposed livery.

The livery will be a key element of the brand and its look and feel will need to be reflected in other marketing materials and vice versa.

For 2007 the following strap line is suggested which if agreed would appear on all marketing materials, including the buses.

The New Forest Tour
See more...Explore More...Enjoy more.

7.4 Product Strategy

The two double decker open top buses used in 2006 will continue in 2007, with the tour commencing on May 26.

Options to create a high quality audio commentary will be pursued but it is unlikely that the commentary will be available on the buses for the 2007 season due to cost. Instead, a series of 'NFT handbooks' will be produced which add value to the bus tour by providing information on walks, cycle rides and 'things to see and do' en route.

For 2007 cycles will be accommodated on the lower floor of each of the buses, negating the need for a towed cycle specific trailer.

Investigations should commence looking into the viability of having the NFT brand at bus stop 'flags' and shelters. This will increase audience reassurance for undertaking activities, such as walking and cycling, during the NFT experience.

7.5 Pricing Strategy

Prices for the NFT for the 2007 will mirror that for 2006, the prices being:-

Adult £9.00

Child (5-15) £4.50

Family (2 Adults + up to 3 Children) £22.50

No reduction for student or senior.

Those eligible for the Hampshire Fare Pass scheme (concessionary fares) will enjoy free travel on the NFT. The mechanisms for recording this fare type should be robust.

7.6 Place strategy

Tickets will continue to be sold on the bus and in the New Forest VIC's.

An online ticket sales facility should be developed through the NFT website at www.newforesttour.info which will bring the product in line with other New Forest visitor attractions and other UK open bus tours.

Marketing intelligence should be sought at point of sale and particular opportunities exist for this through the online channel. The limitations of the bus operators 'wayfarer' system make it difficult to collect customer data for tickets bought on board the bus.

7.7 Promotional Strategy

The following actions should be delivered for the 2007 season:-

- The creation of a dedicated NFT website.

Ideally, this should form part of the Solent Blue Line series of micro-sites, available through www.solentblueline.com but will also need its own URL which can be promoted as part of the 2007 campaign and can be linked to and from other sites. This URL will be www.newforesttour.info

- Product
- Price
- Online ticket sales
- Timetable
- Map to include destinations and attractions on route
- Image gallery
- Parking information
- Weather
- Feedback form

As well as direct promotion, the success of the website will be links to and from other sites, to include accommodation providers and visitors attractions within the park and within the major conurbations surrounding the park.

- Hard Copy promotional literature

Leaflets - Solent Blue Line will produce promotional leaflets for the 2007 campaign. These should be double sided 3 fold A4 and sell the product through imagery, timetable and route map. A similar leaflet was produced in 2006 under the CitySightseeing brand and was subsidised through the use of 5 commercial adverts.

Leaflets should reflect the agreed NFT brand and use high quality imagery to convey messages. The leaflet should present useful information to include price, map, timetable and information on the destinations and attractions on route.

A publication distribution strategy should be agreed and should include accommodation providers (hotels, B&B, self catering, campsites), visitor attractions, garages, retail outlets and food and drink providers, as a minimum.

Posters – Solent Blue Line will produce A4 and A3 promotional posters. These will again reflect the agreed brand and will follow a similar distribution strategy to that of the leaflets.

Day Out Guides – In 2005 a series of day out guides were offered to NFT customers. These guides provided information on walking and cycling routes which could be undertaken as part of the NFT experience.

In 2007 the day out guides will be revamped to form an NFT ‘handbook’. The cycling and walking routes will remain but additional information will be included and format of the guide will change to booklet form. Additional information will include:-

- Things to look out for from the tour – e.g. Sway Tower, specific wildlife etc
- A brief history of the New Forest
- A Quiz for children

The ‘look and feel’ of the NFT handbook will reflect the agreed brand and the publication will be available as part of the ticket price. Every effort will be made to provide customers with the handbook in advance of the experience – e.g. as a part of online ticket sales fulfilment or via VIC’s. However, NFT drivers should also keep a stock and offer to customers when boarding the service.

7.8 Advertising Strategy

Paid advertising should be considered for appropriate publications, particularly where there is evidence that the process will be cost effective.

Publications to consider include:-

Forest Focus
New Forest Visitor Guide
New Forest Today
Hampshire Now (HCC)

Online channels should also be used for advertising and it may be possible to attract reduced rates due to the nature of stakeholders. High visitor New Forest websites should be approached for online channel advertising, these are likely to include:-

www.thenewforest.co.uk
www.newforest-online.co.uk
www.new-forest-uk.co.uk
www.newforestshow.co.uk
www.newforestmuseum.org.uk

The Visitor Channel is a marketing tool that is currently installed in the Visitor Information Centre’s (VIC’s) across the New Forest District. It continuously plays a pre recorded DVD on a strategically placed screen showing a range of services,

activities and attractions available in the New Forest. The company that operates the service include the recording of the advert in their costs. You then pay for the period that suits your budget or season of operation. It has proved popular in the VIC's and provides a professional end product to a captive audience (i.e. people queuing in the VIC or just browsing for information on things to do)

7.9 Public Relations Strategy

Opportunities for positive PR will be maximised. As in previous years, a high profile press launch will be scheduled for the week before the NFT commences in 2007. Effort will be made to encourage a range of media representatives to the launch, with maximum media exposure the main output.

Press releases will be issued regularly throughout the summer 07 season. Emphasis will be placed on key milestones for the product such as 10, 000th customer, 1000th tour etc, in order to gain media interest.

Ongoing opportunities should be sought with local and national tourism media correspondents for experiencing the NFT (e.g. recent interest from the London Cycling Magazine).

7.10 Market Research Strategy

In depth market research will be progressed during the 2007 season in order to identify the core target markets for 2008.

The Tourism on Board survey used in 2005 and 2006 will not be commissioned for 2007 due to very small sample sizes returned in previous years.

Emphasis will be placed on developing a robust system for recording the number of tickets sold and revenue generated through each ticket type sold. Analysis of this information will provide an evidence base for decision making in 2008.

8. Business Development Opportunities

Opportunities exist for the use of the bus outside of the secured 100 day period. At the time of writing the exact wording of the contract is being investigated and this will define exactly what opportunities exist.

The New Forest Visitor Survey (2005) researched the education market and found that 58% of Hampshire, Dorset and Wiltshire schools had or were intending to visit the New Forest.

Visits were most likely to take place during May, June, July or October.

58% of schools used a private coach to travel to the New Forest and this provides an excellent evidence base for further exploring new business opportunities within this sector.

A second market sector worth exploring is the 'grey' market. In researching why people did not visit the forest, 7% of non-visitors indicated that better provision of public transport services (to the New Forest) would encourage more visits, a further 2% mentioned better public transport facilities within the Forest, and 2% would like transport for elderly people to visit.

There has also been interest from Tourism South East for using the bus 'out of season'

The NFT can provide flexibility in accessing destinations which are sought by the 'customer', whilst providing a unique way of travelling.

9. Resource Requirements and Budgets

2007 will see the responsibility for marketing shared amongst the four stakeholders.

Selected elements of the campaign will be met by Solent Blue Line as part of their contract with their media partner Best Impressions. These elements include the bus livery, website development and the production of selected hard copy marketing materials, such as leaflets and posters. Exact confirmation of Solent Blue Lines resource has been sought.

Other partners will be jointly responsible for the other marketing actions, as detailed in the marketing action plan.

10. Controls and Update Procedures

There will be monthly marketing plan implementation meetings in 2007 up to the end of September. Representatives of each of the partner organisations will be invited to attend these meetings at which a report on progress against implementation of the action plan will be given.

This plan is to be revised every 12 months.