

The New Forest Tour

Product Marketing Plan

2008



www.thenewforesttour.info



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Annex 1 – 2008 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. A further modest increase was seen in 2007 despite the adverse weather. The growth in the customer base can be attributed to doubling the capacity through the introduction of a second bus and more coordinated marketing.

The service is seasonal and for 2008 will once again operate for 100 consecutive days commencing 24 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 in 2005 and 2006 was commissioned through the organisation 'tourism on board', however, small sample sizes mean that unfortunately little confidence can be taken from the results. In 2007 all customers had the opportunity to provide feedback through a bespoke customer feedback form included in the New Forest Tour Official Guide. Certain trends are apparent from research analysis and product development must respond to customer feedback, and ensure in particular that the quality of the experience warrants the price.

For 2008, a coordinated marketing campaign will focus on raising awareness of the product both within the New Forest and beyond. 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 Product

NFT provides a unique visitor experience aimed at serving the day visitor, overnight visitor and long stay visitor to the New Forest. In 2007 the NFT ran at roughly 20% capacity based on patronage of 9879 compared to maximum patronage of 49000.

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.

The NFT experience includes options for customers to enjoy a number of walking and cycle routes which link up with the bus timetables, free carriage of up to 5 cycles can be accommodated on both buses.

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.

2.2 Place

Tickets for the NFT are available to purchase on the bus, through Visitor Information Centres at Lyndhurst and Lymington, and online. For the 2007 season some 25% of tickets were sold through VIC's. This is considered by customers to be a welcome additional channel for ticket purchase and will be continued in 2008.

The facility to purchase tickets online was introduced for the 2007 season but did not prove popular with customers. Additional promotion and discounting for the online ticket sales option will be pursued in 2008, replicating the ease with which tickets can be purchased online for competitor visitor attractions.

2.3 Price

The 2007 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

No price changes are proposed for the 2008 season. New Forest District concessionary fare pass holders will enjoy free travel on the NFT in 2008, all other fare pass holders will pay full fare.

The service will also be available for local journeys which will be available at market prices.

2.4 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.

Specific promotional actions in 2007 included:

- The development of a new brand and livery, appropriate to the New Forest;

- The production of a NFT Official Guide, which was handed to customers as they boarded the bus and included a written commentary, together with discount vouchers for attractions and other services along the route;
- Dedicated NFT website, with the ability to offer online ticket sales www.thenewforesttour.info
- Product leaflet with a print run of 60 000, distributed to over 300 locations in and around the New Forest;
- For product specific banners, displayed at Visitor Information Centres and the Wightlink ferry terminal throughout the season;
- The promotion of car free opportunities arising from the NFT, in particular its ability to carry cycles.

2.5 Market Overview

New Forest Tour 2007 Customer Feedback Analysis

250 customers provided feedback of their NFT experience in 2007 using the feedback form in the Official Guide. This represented 4% of the total customer base.

Key findings:

- 93% agreed that the NFT improved their understanding of the New Forest;
- 69% agreed that the weather affected how much they enjoyed the NFT experience;
- 79% agreed that the NFT will help to reduce the impacts of traffic in the New Forest;
- 44% followed, or planned to follow, one of the four walking or cycling routes offered in the Official Guide;
- 10% stopped at Exbury Gardens, and paid the entrance fee, before continuing their journey on the bus;
- 42% were day visitors;
- 58% did not use the car to access the NFT;
- 16% were repeat customers.

2004/05 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)

2.6 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

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.
- 96% 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 2008 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 2008. (Source: Visit Britain)

6. Marketing Objectives

- To increase ticket sales by 50% for the 2008 season
- To increase revenue generation by 50% for the 2008 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, and local people. 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.

7.3 Branding Strategy

The bus livery was revised for the 2007 and a new 'local' branding was created, in keeping with the destination. Feedback from customer suggested that the new branding was well received, and helped to change the perception of the product from a bus service to a visitor attraction.

7.4 Product Strategy

The two double decker open top buses used in 2007 will continue in 2008, with the tour commencing on May 26. Livery and branding will be unchanged.

A high quality, consistent, audio commentary is currently being developed by the National Park Authority – this is a direct response to 2007 customer feedback which suggested that the inconsistent, at times poor quality commentary was a cause for concern.

In addition, the New Forest Tour Official Guides will continue to be offered to all customers on boarding the bus for the first time. These add value to the bus tour by providing information on walks, cycle rides and 'things to see and do' en route.

For 2008 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 2008 will mirror that for 2007, 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 New Forest District 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, in the New Forest VIC's, and online.

An online ticket sales facility will continue to be available through the NFT website at www.thenewforesttour.info (and serviced via the destination website www.thenewforest.co.uk). Consideration should be given to discounting online ticket prices to encourage pre-booking and overall bookings via this channel.

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 2008 season:-

- Dedicated NFT website.

The product website will continue to be www.thenewforesttour.info and will cover the following:

- 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. Strong efforts should be made to achieve this wherever possible

- Hard Copy promotional literature

New Forest Tour Official Guide - this will continue to be made available to all customers in 2008 as they board the bus for the first time. Content will remain as per 2007 (there are large stocks remaining).

Consideration should be given to offering these as bedroom browsers.

Leaflets - Solent Blue Line will produce XX'000 promotional leaflets for the 2008 campaign. These will essentially be the 2007 design with a few minor amendments.

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.

It is essential that leaflets are made available at least 6 weeks before the start of the season to allow the distribution company to stock all relevant outlets.

Posters – Solent Blue Line will produce 100 A4 promotional posters. These will again reflect the agreed brand and will follow a similar distribution strategy to that of the leaflets.

A stock of A3 posters remain from the 2007 campaign and these can be reused.

7.8 Advertising Strategy

Paid and unpaid 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). 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. Rates are for an agreed period 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)

In 2007 the NFT was promoted in this way and consideration should be given to investing in this again for 2008.

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 2008. 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 2008 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. UK Bus Awards).

7.10 Market Research Strategy

The feedback form within the New Forest Tour Official guide will again be used to provide a valuable source of customer intelligence.

Consideration should be given to further incentivising the completion and return of these forms.

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

2008 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 operation and the production of selected hard copy marketing materials, such as leaflets and posters.

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 steering group meetings in 2008 up to the end of September. Representatives of each of the partner organisations, and other specialists 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.