

## Topic Paper No 5

### Forestry and Tourism in Scotland

#### What is tourism & its economic benefit?

In Scotland, the tourism industry is worth £4.5 billion per year and employs 200,000 people (8.8% of Scottish employment). 89% of Scotland's visitors are from within the UK, contributing 81% of the £4.5 billion tourism income. In comparison, the forest industry directly employs 10,694 people (0.45% of Scottish employment) and is worth around £630 million per year.

[[http://www.scotexchange.net/tourism\\_in\\_scotland\\_2003.pdf](http://www.scotexchange.net/tourism_in_scotland_2003.pdf)]  
[http://www.forestry.gov.uk/pdf/fcfs204.pdf/\\$file/fcfs204.pdf](http://www.forestry.gov.uk/pdf/fcfs204.pdf/$file/fcfs204.pdf)

95% of tourists are attracted to the destination by the beautiful Scottish scenery. Woodland and forests are an integral part (17% of the landscape), so we can assume that their presence influences visitors' attitudes towards the destination. (representing £715 million of tourism income per year to the country).

In addition, around 18 million people visit forests and woodland every year, spending approximately £120 million. Per day, overnight visitors to Scotland spend an average of £56 each, while those visiting from home spend £13.50. The average day visitor to a forest spends £6.60.

Scotland's tourism industry is very fragmented, with the majority of tourism businesses being small/medium-sized enterprises. The Scottish Executive currently funds VisitScotland - £47 million per year and Forestry Commission Scotland - £80 million per year. (2005/06 figures)

***How best can forestry support and encourage these businesses?***

#### Why do visitors come to Scotland?

The top attractions in Scotland, for all the top-originating markets (UK, European & USA), are: beautiful scenery, friendly people, good place to relax, interesting history/culture, good for hiking/walking, plenty to do & see, slower pace of life. It is obvious that woodlands and forests play a key role in the attractions of the destination (respectively: forests & big/heritage trees, rangers, picnic sites & viewpoints, interpretation of sites, way-marked trails & access to hills, visitor centres & tours, stroll in the woods).

***How can and should forestry do more to meet these needs?***

To target potential visitors to Scotland, VisitScotland has segmented Scottish tourism into 5 areas of consumer interest: freedom, culture, cities, active and business. By working closely with the national tourism marketing organisation, tourism providers (including forestry) create a more coherent national message, carefully aimed at potential first-time or repeat visitors.

***How should forestry complement this work?***

### **Who else is working in tourism in Scotland?**

VisitScotland is the national tourism board. Scottish Enterprise and Highlands & Islands Enterprise are the economic development bodies. EventScotland is a joint venture between VisitScotland/Scottish Executive aiming to maximise the number and benefit to the country of international, regional and local events. SportScotland is active in tourism to the extent that sports development means more facilities are available to visitors as well as local people.

Scottish Natural Heritage markets the National Nature Reserves and supports many other nature-based tourism projects, such as the Tourism & Environment Forum (with VisitScotland). Historic Scotland manages heritage sites in Scotland (a parallel role to Forestry Commission Scotland in forestry). National Museums and National Galleries of Scotland actively attract both Scots and visitors. Many NGOs and charities are also involved, for example: The National Trust for Scotland, the Royal Society for the Protection of Birds, the Woodland Trust Scotland and the Scottish Wildlife Trust.

***Who should FCS and the forest industry be working with?***

### **What do Scotland's forests offer the tourist ?**

Forest tourism is a superb part of Scotland's product, offering visitors the chance to enjoy the landscape, whenever they want, at no cost, at hundreds of well-maintained, safe sites across the country. It adds extra value to holidays in a country that will never be 'cheap', by contributing experiences and memories which money cannot buy.

At present, there is growth in sectors such as wildlife-watching, mountain-biking, kayaking and other adventure sports, for which forests can offer an unrivalled location and good opportunities for new business development. However, the 'traditional' activities of walking (including responsible dog walking), forest cycling and horse riding form the bedrock of demand and landowners should continue to develop these to meet the needs of visitors.

***How should we cater for this new demand? Where should it be located? What is the public/private balance in terms of building new infrastructure?***

Adding value to the facilities onsite, Forestry Commission Scotland (FCS) also offers a wide range of public events throughout the country. These are run by local Forest District offices alone or in collaboration with other organisations. Most of these are free and include 'fungi forays', wildlife watching, guided cycle rides etc.

On many sites on the national forest estate, interpretation tells a story, whether it is nature-, history- or culture-focussed. This is more than simply signage and requires maintenance and development to ensure it remains relevant to the audience. The acknowledged interpretation and design expertise of FCS is often shared with partner organisations.

Forests contribute to the physical/mental wellbeing of visitors (and, thereby, their enjoyment of the destination), as trees frame an unexpected view, autumn colours glow from holiday photographs, adrenaline surges through the veins on a mountain-bike trail, or a red squirrel dashes through the trees.

***Is there scope in Scotland for Spa/Well-being tourist products located in forests? Who should be investing?***

## **Where are we now? The current state of forest tourism**

Since summer 2004, FCS has been working on a more strategic level with the tourism marketing and development bodies to expand and develop the visitor experience and increase the benefits forests bring to Scotland's tourism product. This "Forest Tourism Initiative" aims to develop tourism on the national forest estate, but its findings/activities will also be available to other landowners, to optimise the public investment.

FCS is the largest landowner in the country and accepted as the largest provider of outdoor recreation in Scotland. Until recently, however, the organisation has not actively marketed or developed the product on a strategic level, relying instead on dispersed, local promotion/development, some of which has been very successful, some less so. In other words, it could do far more to inform the tourism industry/visitors of what it has to offer. Many stakeholders in the wider tourism industry, unless actively involved in an initiative such as Big Tree Country (Perthshire), have been unaware of the breadth of the forest tourism product. Educating other tourism players must therefore be a key element of future development of the forest tourism product as they are a vital 'route to market'.

***Who are the progressive and trusted tourism businesses we could work with? How best can we educate tourism providers about the forest tourism resource?***

Many private forest tourism providers encourage access for activities on their land throughout Scotland and in some areas, these landowners, rather than FCS, are the major forest tourism provider. Many of these tourism sites have been partly funded by the Scottish Forestry Grants Scheme, administered by FCS.

***How could/should this be developed to support the private sector role? How should the private sector role develop?***

There are many commercial companies using the forest resource to benefit their business: tour operators stop for viewpoints, toilet stops or leg stretches; specialist activity operators pass through or remain in the forest. These companies do not always differentiate between public and private land and may even use the forest without any communication with the landowner. These 'commercial' uses of the forest estate mirror the uses by ordinary consumers: using the high-end facilities, which may not involve actual contact with the trees, or involved in lower-impact, nature-based visits, where the woodland itself is the principle reason for their choice of visit. At present, FCS has 6 visitor centres, some with additional businesses operating in them, and a number of sites with toilet facilities.

***Is it necessary for FC Scotland to provide these facilities? Or should (some of) these be run by private businesses?***

### **Why does FCS “do” tourism?**

The benefits of the national forest estate's tourism product are wide and help meet the Scottish Executive's objectives for health, education, conservation and social inclusion, as well as tourism. There is an important crossover between recreation and tourism, with many facilities being used by both. The former are activities undertaken by local people/day visitors and the latter by visitors spending at least one night away from home. Just as facilities (trails, play areas, bridges) built for local communities can become attractions for tourists, so investment in those targeted at tourists can benefit the local communities' quality of life.

Reference is made of the importance of the forest estate in the ***National Tourism Strategy and Towards a Cycle Tourism Strategy for Scotland***, as well as in the ***Scottish Forestry Strategy***. In each, the Executive aims to increase the role of Scotland's forests in tourism.

While FCS does not generate much income directly from its tourism activities (car parking fees at key sites; retail and catering at its visitor centres), it has the capacity to support many small- to medium-sized enterprises, fully or partly reliant on their proximity to or use of it. This 'service provision' underlines the importance of the national forest estate to tourism development.

***Where does the money come from? When and how should charges be levied? What is the public/private balance?***

The national forest estate is there for Scotland's people to use and enjoy, managed on their behalf. Private sector landowners may also want/need to make money from their tourism activities, so it is important that FCS shares information with others and avoids unfair competition. Good examples exist in both private and public sector of good tourism practice.

***How could we share best practice? How, when and what sort of information should FCS make available? How can FCS provide business opportunities and maintain fair and open competition conditions?***

**What does FCS offer currently?**

VisitScotland has 4 leisure tourism brands. Examples of where forests fit:

|  |  |   |  |
|--|--|---|--|
| <b><u>FREEDOM</u></b>  |  | <b><u>ACTIVE</u></b>  |  |
| <ul style="list-style-type: none"> <li>▪ Open access 24/7</li> <li>▪ Informal: walking, dog walking, photography</li> <li>▪ Play areas</li> <li>▪ Cafés/shops</li> <li>▪ Walking trails</li> <li>▪ National Parks</li> <li>▪ Forest Holidays cabins/camps</li> <li>▪ Interpretation/orientation</li> <li>▪ Signed car parks</li> </ul>       | <ul style="list-style-type: none"> <li>▪ Picnic areas</li> <li>▪ Wheelchair accessible trails</li> <li>▪ Wildlife watching</li> <li>▪ Visitor Centres</li> <li>▪ Forest Parks</li> <li>▪ Forest Drives</li> <li>▪ Archaeological/industrial heritage features</li> <li>▪ Art/sculptures</li> </ul> | <ul style="list-style-type: none"> <li>▪ Orienteering/Trailquest</li> <li>▪ Horse riding</li> <li>▪ Kayaking/canoeing</li> <li>▪ Fishing</li> <li>▪ Ice climbing</li> <li>▪ Walking &amp; hill-walking trails</li> <li>▪ Cycling trails</li> <li>▪ Mountain-biking trails</li> <li>▪ Dog sledding</li> <li>▪ Mountain access</li> </ul> |  |
| <b><u>CITIES</u></b>   |  | <b><u>CULTURE</u></b>   |  |
| <ul style="list-style-type: none"> <li>▪ Woods accessible from cities</li> <li>▪ A 'green' alternative to city life</li> </ul>   |  | <ul style="list-style-type: none"> <li>▪ Interpretation/orientation (of natural or historical features)</li> <li>▪ Art/sculptures</li> <li>▪ Archaeological/industrial heritage features</li> <li>▪ <i>Ad hoc</i> cultural performances</li> </ul>  |  |
| <b><u>BUSINESS</u></b>   |  |   |  |
| <p>At present, there are no products available on the national forest estate which meet the requirements of the Business brand, although some private sector tour operators (on both public and private land) and landowners do offer products aimed at business and corporate audiences, such as 4x4 diving or teambuilding activities.</p> |  |   |  |

**What are the attractions of Scotland's forests/woodland?**

Scotland's landscape varies according to area, as do the reasons for visiting each area. It offers diverse and accessible scenery within a relatively small area, with a variety of experiences over a short space of time, even when city-based. Forests are open all day, every day and can help visitors make the most of the weather (high rainfall boosts waterfalls!), with a free, sheltered outdoor resource for activities, often even during the winter.

Scotland's forests are varied: some coniferous forests are occasionally perceived negatively but overall they play an important role in providing both a 'backdrop' and visitor facilities; native pinewoods, oakwoods and mixed woodland play a very important role. Planning the future development of our forests will determine how Scotland's landscape will look and, therefore, how visitors will perceive, enjoy and participate in it.

In addition to offering habitats for animals and plants, carefully-planned, extensive forests can enable relatively large numbers of people to do the activities they wish without disturbing other people or animals (as they can absorb sights and sounds open landscapes cannot). Careful thinning, creating new views, way-marking and interpretation all make a real difference to the tourism offering.

Forests and woodlands are only one part of Scotland's landscape and many visitor activities take place on open land, moor or hilltops, too. But in most parts of Scotland the forest is still an important part of the background scenery, without which the countryside could appear (to some) as barren and unwelcoming.

### **Where do we want to get to? Some areas of action for forest tourism**

We want to increase the number and variety of visitors to Scotland's forests to benefit sustainable rural development through tourism. Scotland's forests must work more closely with other tourism providers: we do not exist in isolation. A destination is more than simply a beautiful landscape; it is an area's accommodation, visitor attractions, cafés, pubs, shops, people, woodland walks and rivers. A quality destination is one where the visitor can move seamlessly from one element to another, where they co-exist to the greater good of all.

FCS is a leader in terms of trail-building and interpretation, but must continue to seek out new opportunities to better meet the needs of visitors, and increase economic benefits to the local area. As well as generating ideas within Scotland's forestry sector, we must learn from other destinations and listen to the requirements of local tourism businesses to ensure that forest tourism (public and private sector) can be an innovative and dynamic part of Scotland's quality tourism product.

We must improve the marketing of forest tourism to anticipate and meet the needs of potential and repeat visitors to Scotland. This can be done in partnership with other national tourism organisations and commercial partners, as well as with local activities that target communities and visitors who are already here. Building great customer experiences starts from the first contact. If an accommodation provider's website already uses their nearest woodland to attract visitors, can we assume these visitors are more likely to visit that wood and others when they get there? If this is the case, one quality experience should follow another, as Scotland's tourism providers (private and public sector alike) share best practice.

The many administrative boundaries used by local authorities, tourist boards, FCS and others must not stand in the way of the visitor's understanding and enjoyment of Scotland: we must be flexible and visitor-focussed in our activities.

## **How do we get there? A strategy for achieving our goals**

Perhaps:

- Greater collaboration with the tourism marketing and development organisations.
- Research: FCS has a role in leading and working with others on this and sharing results.
- Enlighten the wider tourism industry as to the benefits of forest tourism.
- Considered, professional marketing of visitor facilities/benefits of Scotland's forests.
- Modernisation of facilities, products and services, including consumer-friendly packages.
- Invest in our people as hosts through 'pride and passion'
- Innovate and take some risks to ensure that we are ahead of our competitors
- Monitor and evaluate all that we do to ensure continuous improvement

**What do you think we should be doing and how?**

**Fiona Murray**  
**Forest Tourism Initiative Manager**  
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The Forest Tourism Initiative is a partnership between Scottish Enterprise, Forestry Commission Scotland, VisitScotland and Highlands & Islands Enterprise