



Discover England Fund - Round two application

Make great memories in England's National Parks



April 2017

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Executive Summary

England's National Parks are living landscapes unlike any other where residents and communities work the land, shape the landscape and make their living. Our National Park communities are part of our English culture, passing down unique traditions from generation to generation. The appeal of these quintessential living English landscapes is what attracts visitors from all over the world every year. But the opportunity to expand the knowledge and appeal of our National Parks to overseas visitors is huge, making our National Parks a global attraction in their own right and not just an add-on to existing visitor itineraries.

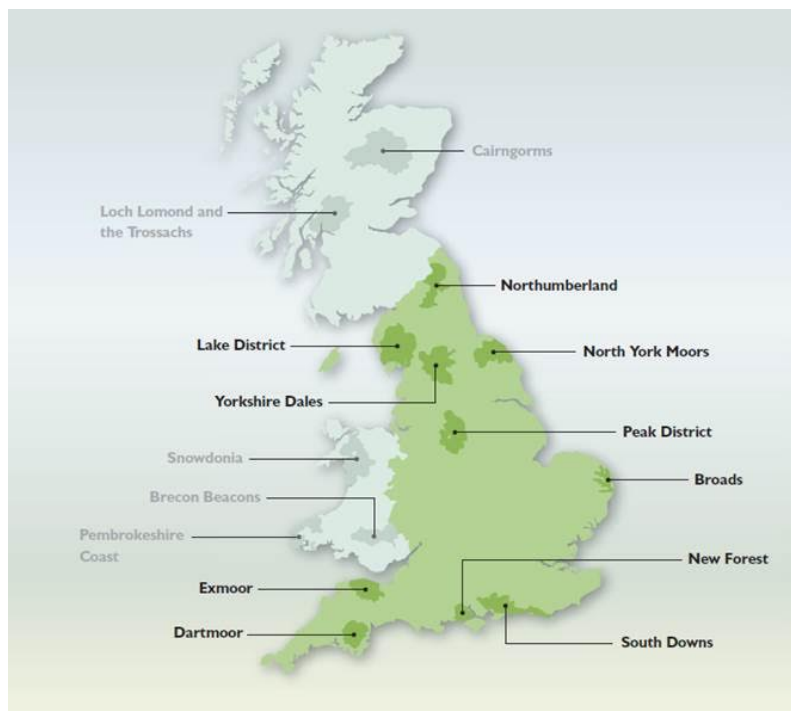
Our project will introduce the 'National Parks Experience Collection' - a travel-trade focused proposition, which develops the appeal of England's National Parks through the creation of new and immersive experiences for visitors. This Collection will present an opportunity for visitors to enjoy the real English countryside - the quirkiness, the extraordinary and the exceptional side-by-side with some stand-out internationally renowned tourism icons. It will

be a collection of memorable, once-in-a-lifetime experiences in our National Park landscapes will help our visitors to delve deeper into rural English life and connect with local people, history, culture and cuisine. Many of these experiences will be led by National Park Rangers.

Research demonstrates that the fast-growing Australian outbound tourism market aligns to the proposition we are offering through this project. The Australian 'Outdoor Enthusiast' (age 35-55) and 'Mature Experience Seeker' segments (age 50-65) represent the right demographics, have a propensity to travel with a strong outbound trajectory and is motivated to visit the rural offer in England. Through the development of easily accessible and bookable experiences, joined up with quality accommodation and transport offerings, the new 'National Parks Experience Collection' will represent the natural jewel in England's countryside tourism offer. This newly created tourism offer will provide a halo effect to other markets, with the German, Dutch and North American markets being next in line as the product develops beyond 2019.

Section one

Project outline



England's ten National Parks

1.1 Introduction

England's National Parks offer a unique proposition within the global tourism marketplace. Many people are unaware of this. Think of National Parks and people can easily quote the global icons: Yellowstone, Yosemite, Banff and Kakadu. England's National Parks are not like these National Parks. What makes them different and truly unique, is that they are ungated, living landscapes where residents and communities work the land, shape the landscape and make their living side by side with visitors. Our National Park communities are part of our English culture, passing down traditions and unique ways-of-life from generation to generation. England's National Parks are the heartbeat of a nation and the appeal of these quintessential living English landscapes is what attracts visitors from Europe, Australia, Asia and North America every year. Each English National Park has a distinctly awe-inspiring uniqueness.

Our National Parks receive in excess of 90 million visitors per year and generate an annual visitor expenditure of £4.9 billion. The reality however is that the enjoyment of National Parks is dominated by domestic day visitors: over 93% of visitation is domestic and over 78% of all visitors to the Parks are day visits. Yet we know from insights and intelligence that our National Park brand resonates strongly with certain international markets where those markets have exposure to and understanding of our offer. National Parks in England receive in excess of 5.2 million overseas visitors per year. By developing and enhancing the English National Park offer, we have an opportunity to increase visitor spend and to make our National Park resource into a significant international tourism revenue generator.

This project will be a game changer for England's National Parks and the role that they will play to attract new visitors to the UK and to encourage these visitors to travel from London and other metropolitan areas into our natural environments to experience that quintessential English life. This will be achieved through the creation of appealing, emotional and motivational experiences packaged in a way that can be easily bookable and easily accessed through the support of tour operators and by independent travellers.

The project links neatly with the government's 8-point plan for National Parks (2016-2020) which sets out to promote National Parks as world-class destinations for visitors and using the National Parks as a means to drive growth in international tourism. This project will also support the government's goal of dispersing expenditure generated by international visitors, where currently over 50% of the £22.1billion generated from international visitors remains within London.

The model for this project is not new. We are riding the crest of a wave in terms of trends in global tourism with the focus on health and wellbeing, 'rural get-aways' and escapism; trends that can be captured within the concept of 'experiential tourism'. Visitors are no longer satisfied with buying a product. They want to immerse themselves in unique experiences that capture the essence of a place – the culture and traditions, and to create a lifetime's worth of memories. There is a timely convergence between these global trends and our proposition.

There are four strategic elements in our project that will be undertaken, all of which will be informed by international best practice from Canada, Ireland and elsewhere (see Annex 2):

1. Development of an overarching **experiential brand in England’s National Parks**, specifically designed to unify the proposition and achieve cut-through to our favoured overseas markets via the travel trade;
2. Development of a **framework** to enable local businesses to be engaged in the offer, improve their productivity and enhance the overall visitor experience;
3. Creation and delivery of a range of **compelling world-class experiences** within all of the National Parks highlighting the distinctive nature and assets of each; and
4. Development of a **travel trade strategy** to stimulate commercial partnerships that successfully connect the brand and its bookable product with our targeted overseas markets.

1.2 Our target market

In 2013, Britain welcomed more than 1 million visitors from Australia, worth more than £1.2 billion. Of the total number of overseas visitors to National Parks in England, we know that Australia was one of the top two markets by visit volume at 14% and second only to Germany at 15.8%¹.

The Australian market is attracted to England’s countryside and rural offer, to local culture and heritage. They have an above average propensity to visit the rest of England, over other international markets and enjoy meeting the locals and experiencing quintessential English life.

The over 45 age segment is expected to grow in the years between now and 2021 by 28%² with England being perceived as easy to visit and an extension of home that shares the same language and cultural norms. Due to the strong historical and family ties between both nations, Australians visit Great Britain to explore personal ancestral heritage and the perception that they hold is that Britain will offer a unique and fascinating visit. Australians are extremely likely to recommend Britain to their friends and relatives.

While more Germans visit England’s National Parks than any other market, Australia is the second largest market and market intelligence demonstrates that Australia will present the greatest leverage and expansion in the coming years:

- Australia is a long-haul market where length of stay and spend will normally be higher than short haul markets;
- Australian demographics and propensity to travel will mean that the potential for growth over time may be higher than in the German market which more mature;
- Since 2000 annual Australian outbound holiday travel grew at some 8.5% and year while domestic travel declined;
- The TRA³ concluded that outbound trip propensity for Australians would further increase to 2020 at the expense of their domestic tourism sector. This increase has already shown through in our National Park’s surveys and represents a real opportunity for English National Parks in relation to this bid; and

¹ National Park independent research conducted by Team Consulting, 2017.

² VisitBritain

³ What is Driving Australians’ travel choices – Tourism Research Australia – 2011

- There are a range of airline carriers operating directly from Australia to London or transiting through Asia or the Middle East to a wide selection of airports in Britain.

Summary Insights:

1. Australia is one of the largest existing international markets visiting National Parks in England;
2. Australians are motivated by the unique appeal of the English countryside, rural landscape, culture and heritage – the quintessential English Experience. Visiting friends and family and exploring ancestral linkages is a motivating factor for many;
3. Research indicates that the Australian outbound market is strong and is set to grow in the years ahead; and
4. The English National Park offer is a motivator to the Australian market and Australians are willing to move out of London and into the regions, helping to spread visitor spend and support rural communities.

1.3 Our partners

This project is a partnership of the National Park Authorities across England (see table 1 for National Park partners). This is the first time the English National Parks have worked together on such a largescale and ambitious project and we are fortunate to have an experienced group of tourism professionals from across the National Park family supporting this project, many of whom have experience working in tourism DMOs and UK national tourism agencies. Each National Park Authority recognises the opportunity that this project will afford to increase the value of in-bound tourism to the UK while at the same time strengthen our rural economies.

We also have wide support from Destinations Management Organisations (DMOs) within each National Park that will share in the delivery of the project by helping to source potential experience providers and accommodation suppliers. They will also help with the business development and marketing elements of the project. The objectives of the project dovetail with the rural economic priorities of LEPs and we have been heartened by the level of enthusiasm from our LEP partners up and down the country (see section 7.4).

Of course, this project requires the support of the tourism operators and marketing agencies and our level of travel trade engagement is strong. We are confident that the project will be successfully delivered through a close working partnership of these stakeholders (Table 1).

Table 1: A list of key partners and their roles in the delivery of the project.

Partner	Partner role
<p>England’s National Park Authorities (Northumberland, Lake District, Yorkshire Dales, North York Moors, Peak District, Broads, South Downs, Dartmoor and Exmoor)</p>	<p>The National Parks will work together to develop Experience Development Plans and a new brand proposition for England’s National Parks.</p>

Partner	Partner role
Destination Management Organisations (DMOs)	DMOs across the National Parks will help to identify potential experience providers and will support in the marketing and distribution of the new experiences. While the project is looking to international markets, DMOs will be able to use the new experiences to also enhance the offer to the domestic market.
LEPs	LEPs will ensure linkages with their respective economic plans and strategies and to promote synergies with existing funding streams e.g. EAFRD funding.
Tour Operators	Tourism operators will help promote and distribute the propositions within the chosen market(s).
Tourism Businesses	Experience providers, accommodation providers, transport operators will help to shape the propositions and itineraries.

1.4 Catching the wave: The trend towards experiential tourism development

Travel is no longer about where you have been. It's about what you did while you were there, how it made you feel, the people you met while you were there and the memories that you took home. A product is what you buy; an experience is what you remember⁴. The global trend toward experiential tourism means rethinking the approach within our National Parks so we can offer visitors more experience opportunities, not merely services. The key question is: how can we create unique experiences that will enhance economic value and that visitors can't resist?

We have to consider that the current product offer within England's National Parks is focused on outdoor activities centred on walking and cycling. This offer is widespread across all ten National Parks and visitor perceptions, based on visitor surveys, show that National Parks are famed for this type of activity that aligns well with the motivators for the domestic day visitor. While our current offer provides a foundation to build upon, we need to support our current businesses to move from product development to experiential development, making the product offer altogether more immersive and memorable – and adding economic value to the proposition. (Refer to Figure 1 below which outlines the progression of economic value).

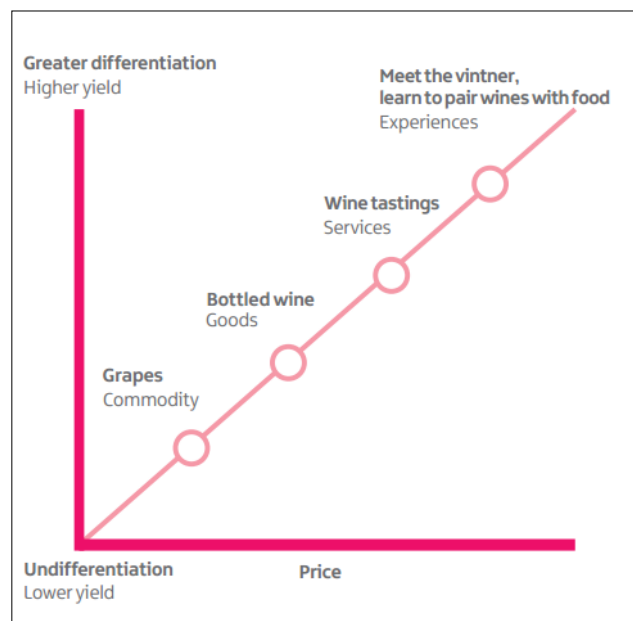
Why simply visit a vineyard in the South Downs National Park when you could help pick the grapes, make the wine and then sample the wine at a local restaurant. Why simply hike to the top of Kinder

⁴ <https://tourismns.ca/sites/default/files/2017-01/2011-experience-ns-toolkit.pdf>

Scout in the Peak District National Park for the view when you could experience the view by hang gliding off that mountain creating an adrenaline-filled memory. Why simply visit an old castle ruin when you could engage in a medieval re-enactment and experience some of the age-old traditions carried out at the castle. In all of these examples, the value of the experience creates opportunity to lengthen visitor stay and create uplift in visitor spend.

We have new tourism officers who have first-hand experience of tourism experiential development in the UK and we would intend to use the excellent experiential toolkits from Nova Scotia and from Northern Ireland as examples to learn from and to replicate within this project.

Figure 1: Diagram showing the progressive value and differentiation of experiences



1.5 Project objectives

The following table (Table 2) outlines our project objectives, proposed outputs, outcomes and impacts over the course of the project. These are described in more detail in section 5.1.

Table 2: Table showing the strategic project objectives (further detailed analysis on objectives, outcomes and impacts can be found on section 5.1)

Project Objectives	Outputs	Outcomes and wider Impact
1. To develop a strong international brand proposition for experiences in England's National	<ul style="list-style-type: none"> New collective positioning of experiences in England's National Parks within tourism marketplace. Renewed connection with target market and 	<ul style="list-style-type: none"> New brand will have cut-through in the international marketplace and will add value to the concept of National Parks within the UK. The perception of the English countryside among

Project Objectives	Outputs	Outcomes and wider Impact
Parks.	segment: Australia and Outdoor Enthusiasts.	Australians will improve.
2. To create compelling world-class visitor experiences within the National Parks	9 Experience Development Plans completed. 3x toolkits created for 1) experience providers 2) accommodation providers and 3) ranger services. Development of new Ranger brand-led experiences and itineraries in four National Parks.	<ul style="list-style-type: none"> • Identification of USP and unique experience propositions within each park. • New, commercially viable Ranger-led itineraries developed in four National Parks
3. To establish an industry development programme	<ul style="list-style-type: none"> • 250 individuals attending workshops / events. • 1x new online travel trade/ tourism industry portal created. • 45 experience providers (5 per park average) to receive intensive business support and training. • 45 accommodation providers supported to access the Travel Trade. • 4x National Park Authorities supported to develop their Ranger Brand Experience 	<ul style="list-style-type: none"> • The development of a new suite of internationally marketable and compelling experiences, Including Ranger Brand Experiences. • Tourism business, providers and accommodation providers supported in product development and customer knowledge.
4. To develop and execute a distribution plan with the travel trade	<ul style="list-style-type: none"> • Newly designed experiences distributed by the Australian outbound travel trade. • Development of distribution channels and the development of a familiarisation programme. 	<ul style="list-style-type: none"> • Increases in the value of international tourism to England’s National Parks. • Extended visitor stays, especially in shoulder months.

A sub-set of objectives for the project include the following:

- To elevate the profile of England’s National Parks and generate improved awareness in targeted international markets;
- To create a new visitor-focused mind set within all National Parks that is demonstrated through the development of an exciting range of new bookable experiences;
- To increase international visitor expenditure within the National Parks and areas of influence;
- To sustain and increase job creation;

- To extend the length of season; and
- Create long-term commercial partnerships with the overseas travel trade.

1.6 Project finances

This business case is in support of a request for £1million investment from the Discover England Fund, supported by £225,000 of cash match funding (Table 3). Additional in-kind match funding is documented in section 6.2.

Table 3: A table showing the cash budget and long-term sustainability for this project

Project activities	Cash budget (inc. cash match funding)	Long-term sustainability
Research and product testing	£32,000	This will create a set of resources which can be used by project participants, National Parks and VE/VB for other purposes.
Proposition development and visitor experience plans	£40,000	This will create long-term plans for each National Park which can be applied to both international and domestic markets.
Business support & training programme	£248,000	The support programme will be sufficiently targeted and focused to ensure businesses can make a real shift in their offer for the long-term. Toolkit resources maintained on the industry website for at least five years after the project.
Ranger led experiences pilot project	£90,000	The new experiences offered by the ranger pilot projects will continue on a commercial basis beyond the project. A toolkit for all National Parks to enable them to develop their own Ranger products for the overseas markets in the future.
National Parks Experience Collection branding	£65,000	Through our commercial partnerships organisation, National Parks Partnerships, we will have a vehicle to maintain strong partnerships with the travel trade if this becomes commercially successful.
Travel trade engagement	£305,750	
Evaluation activities	£30,000	National Park Authorities will continue to monitor trends in STEAM data. A detailed evaluation will assist future projects.
Project management and governance	£349,250	NPAs & DMOs will continue working together with the travel trade to ensure the National Parks Experience Collection is sustained long-term. As a family of National Parks, we will explore ways to maintain centralised support for the Collection in the long-term.
Total cash:	£1,160,000	

Section two

Product Development and Consumer Proposition

2.1 What is the product proposition and how does it join-up a large geography or the country thematically?

Wherever I travel in the world, I always look for places where I can experience more than just the usual tourist traps – I love experiencing the landscapes, the people and the culture of the land I am travelling through.

England’s **National Parks Experience Collection** gives travellers the opportunity to experience first-hand these living landscapes, where residents and communities work the land, shape the landscape and make their living. These new and immersive experiences enable visitors to enjoy the real English countryside - the quirkiness, the extraordinary and the exceptional.

Our National Park communities are part of English culture, passing down unique traditions from generation to generation. They offer a range of memorable, once-in-a-lifetime experiences in landscapes that are magical, breath-taking and unique and that can only be appreciated from within our National Parks. We will take you behind the scenes of rural English life to connect you with local people, with centuries of history, culture and cuisine where the past meets with new outdoor adventures in our finest landscapes; some personally delivered by our National Park Rangers. These easily accessible and bookable experiences, joined up with quality accommodation and transport, will create lifetime memories within our iconic English landscapes.

National Parks Experience Collection: Engage with living culture

Our proposition is unique in that it aligns all of England’s National Parks under a new shared brand, while allowing room to promote the distinctiveness of each National Park. The project will provide a new level of visitor-focused collaboration across the National Parks in a way that has not been experienced before and there is real enthusiasm to make this project a long-term success.

The project will also help to enhance the rural tourism offer across England through a new business development support programme. This will also help to support the sharing of best practice and will assist in the raising of shared standards across the tourism offer.

The proposition combines visits to England’s most outstanding natural landscapes with a range of must see attractions and will provide immersive and profound connections to both the culture of places and the people that live there. Together, this combination of experiences will result in a set of rich and enduring memories resulting in a strong desire to return.

The proposition sees the development of three interlinked themes which will be threaded through every itinerary across all ten National Parks across England:

- Outdoor Adventure – breath-taking activities across striking landscapes;
- Living Landscapes & Hidden Histories – stories of a rich and varied culture steeped over 10,000 years;
- A Place and its People – connecting with and exploring authentic England.

2.2 How does the product fit with international market opportunities and trends?

We have ascertained that our market focus will be the Australian market and we know from the intelligence and research that the two segments which are a best-fit with our offer are the ‘Outdoor Enthusiasts’ and ‘Mature Experience Seekers’ segments. We have an existing understanding of these market segments; their age profile, interests, travel preferences and holiday activities- although further analysis and concept testing will be carried out upon project commencement.

The Australians are second only to the Germans as the most frequent visitors to England’s National Parks (Table 4). The growth in their numbers has been exceptional over the last decade where the Australian outbound holiday market has grown 8.5% a year for the last decade (Figures 2 and 3) and all evidence suggests this will continue as a result of:

- increasing household disposable incomes;
- a stronger Australian dollar;
- changing consumer leisure travel patterns;
- tourism operators facing increasing costs for inputs; and
- a marked increase in aviation capacity supply.⁵

Australia is a long-haul market where length of stay and spend will normally be higher than short haul markets; the National Park family is committed to seeking higher yield rather than volume and this market will support this. As an English speaking market, it will be quicker for us to take the project to market and it will make moving into the North American market easier in a potential future project. This growth and high value potential, together with the strong existing visitor base, makes Australia our first-choice country market.

Table 4: Current international visitors to England’s National Parks

	International market	% of visits to English National Parks
CORE	Germany	15.8
	Australia	14.1
	Netherlands	12.9
OPTIONS	USA	10.6
	France	7.1
	Canada	6.4

Source: Various National Park Visitor Surveys

⁵ *What is Driving Australians’ Travel Choices* – Tourism Research Australia - 2011

Figure 2: Australian outbound and domestic trip propensity (1998-2010)

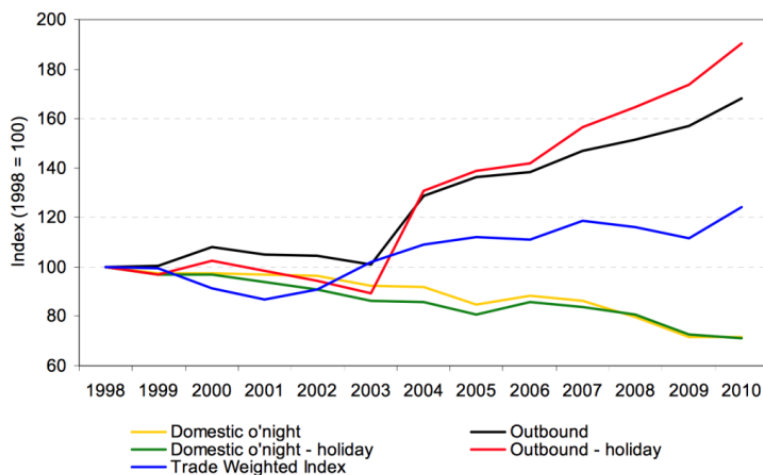
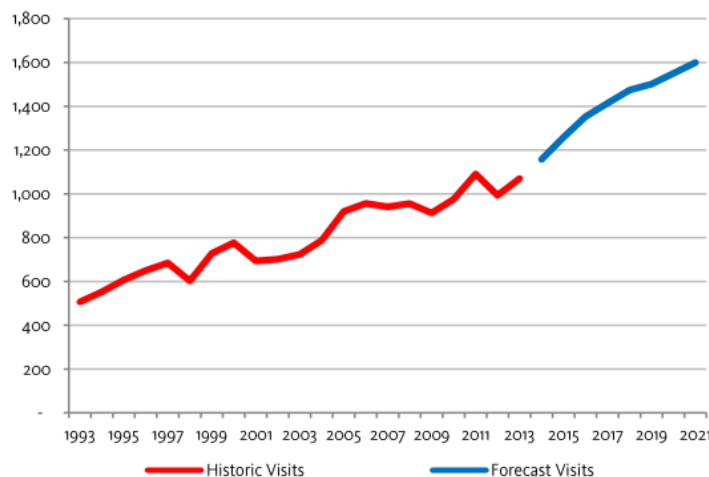


Figure 3: Historic and potential visits to Britain from Australia ('000s)⁶



We have an understanding of our visitors, who they are, why they come and what they enjoy doing. The profile of our overseas visitors is remarkably consistent across all ten National Parks and closely reflect two of VisitEngland’s segments – the *Outdoor Enthusiasts* and the *Mature Experience Seekers*. Table 5 assesses the attributes in each segment with the typical experience offered by national parks and records the fit.

⁶ https://www.visitbritain.org/sites/default/files/vb-corporate/markets/australia_mp_dec14_0_0.pdf

Table 5: Fit of National Parks against two chosen segments

Attribute	Segment	
	Outdoor Enthusiasts 35-55 Families / Empty nesters ABC1	Mature Experience Seekers 50-65+ Empty Nesters / (Semi) Retired Varied
Key Markets	1/3 France / Germany /Spain	3/5 Australia / France / Germany / Spain / USA
Defining Attitudes & Traits	4/4 Active / Nature Lovers / Curious / Off beaten Track	2/4 Young at heart – new found freedom / Keen to learn, see new places
Key Interests	3/5 Walking / Hiking / Cycling Time close to nature	4/5 Healthy & Active Time Outdoors Walking / Hiking Engaging with nature
Travel Preferences	3/4 Beyond ‘sunshine countries’ Activity driven & value ...scenery A sense of discovery	1/4 Active, cultured holidays with plenty of sightseeing
Holiday Activities	5/5 Enjoying natural landscapes Getting close to nature Learning about culture / heritage / food // Seeing the sights, meeting people	4/4 Time outdoors – walking Learning about local heritage & culture Trying a new activity / learning skill Sampling local food
Accommodation Preferences	3/3 Not mainstream hotel chains Independent hotels, B&B camping Quirky close to nature	1/2 Accommodation with character
Total	19/24 – 79% fit to core attributes	15/24 – 63% fit to core attributes

This analysis suggests that the *Outdoor Enthusiasts* are the segment that closest fit the experience offered by National Parks although the *Mature Experience Seekers* also score highly on key attributes such as Holiday Activities and Key Interests so the difference should not be overplayed.

This is also strong support that indicates that the *Mature Experience Seekers* will be motivated to visit National Parks in the recent VE/VB research *Understanding Visitors to England by life-stage February 2017* i.e.

- 65+ year olds are the life-stage most likely to favour ‘mountain areas’;

- ... ‘older generations’ demonstrate a desire to purchase locally made products;
- Luxury 5-star/boutique accommodation ... [sees] significantly fewer over 50s;
- Outdoor activities tend to be conducted by older age groups, particularly in activities that involve visiting the coast or countryside.

Either segment could be picked but the ideal given the strong likely cross-over, is that both segments are targeted in the country market(s) chosen.

In the early stages of the project we would like to explore:

- Likely out of London volumes over the next 5 years for Australian visitors;
- Likely proportion in Australian market of the two favoured segments and growth potential e.g. impact of demographics etc.; and
- Propensity of each market / each segment to visit National Parks.

From our visitor surveys, we know our visitors are nature lovers, active, like to go off the beaten track, are curious and keen to learn. They love walking, cycling, enjoying the landscape, the culture and learning about the people they meet and the history that surrounds them. Our overseas visitors are more often than not also well educated and have the means to enjoy a lengthy stay within a National Park adding significant economic benefit at every stage of their trip.

Hand-picked experiences rooted in local culture and landscape, will be developed in close collaboration with the industry and our partners, and informed by international best practice. The extent of such experiences is only constrained by imagination but here is already a range of existing high –quality offers that can easily be transformed to meet the needs of international audiences. As part of the development of this business case we have looked closely at best practice in Canada, Western Ireland, Australia and Norway; these are summarised in Annex 2.

We will also introduce the Ranger brand to our international experience offer. This new and unique offer in England will enable our National Park rangers to support guided itineraries within and across the Parks either as part of group packages or smaller more intimate offerings. National Park rangers are an international brand through their presence in Australian and North American National Parks. We believe the ranger brand communicates trust, familiarity, a sense of safety and security, as well as the concept of ‘learning while experiencing’ and ‘caring for the environment’. However, this needs testing further in our overseas markets in the early stages of the programme. The Ranger brand has been used successfully by VisitScotland in its marketing activity for Loch Lomond National Park (see [Fiona’s Story film](#)⁷).

Table 6 and Figure 4 show that the National Parks Experience Collection is likely to comprise experiences around six themes which align to the motivators of the Outdoor Enthusiasts and Mature Experience Seekers within the Australian market. (Naturally these motivators will not be exclusive to the Australian market and we anticipate an expansion of our targets market as the project matures beyond March 2019).

⁷ <https://youtu.be/3ur6kFzi2Cs>

We know that these visitors want to discover, learn and enjoy England in ways that are personally relevant and aligned to their own motivations to travel. We envisage that experiences will fall into six broad categories outlined below. We anticipate that experiences will encompass the spectrum of ‘gentle to adrenaline filled’ and from ‘passive to immersive’ to reflect the age range and motivational variants of the two segments.

Table 6: Six potential themes for experiences within the National Parks Experience Collection

Experience Theme	Outline
1. Natural Landscapes	Gentle experiences that will connect visitors to the unique beauty of our National Parks, creating lasting memories
2. Cultural and Community Engagement	Immersive experiences that connect the visitor with culture and to local communities where they can experience rural life at first-hand in a once-in-a-lifetime opportunity
3. Living History	Hands on experiences where visitors can interact with history, engage with traditions and learn new skills
4. Active Activities	Moderate to adrenaline filled active experiences for the slightly daring outdoor enthusiasts
5. Food Experiences	Contemporary farm to fork culinary experiences
6. Ranger Experiences	For individuals and groups who want a range of guided in-depth experiences with trusted local experts

Figure 4: Alignment between target market, segments and themes of the National Parks Experience Collection



When we refer to ‘experience providers’ we are referring to possible types of businesses identified in Table 7 below. We have carried out an initial analysis of the strength and weaknesses of experience provision in England’s National Parks in Annex 3.

Table 7: Examples of possible experience provider types who may benefit from the programme

Type of experience provider	How they may need support?
An multi outdoor activity provider aimed at consumers	Support to offer more than just an outdoor activity; combine with history/heritage and food & drink. E.g. a simple canoeing session becomes a canoeing tour of an area with a focus on history and wildlife, and finishing with an outdoor cooked meal by the riverside.
A specialist provider with a niche focus e.g. The ‘Sussex Modern’ cultural and creative museums of the South Downs	Support to merge their offers into a meaningful experience based on a creative theme and that clusters the experience with the local food and drink trade to make a bookable offer.
Visitor attractions which offer small group experiences (e.g. Honister Slate Mine, a vineyard tour in the South Downs)	Support to combine their attraction with nearby activities which tell a broader story of the area.
A local tour guide (1 person and minibus)	Support to work with other guides to form a co-operative which can provide guaranteed supply of experiences to the overseas travel trade.
Larger local minibus tour operators (e.g. Mountain Goat)	Support to adjust their product to suit the needs of new markets and changing market conditions.
A larger cycle hire centre	Rather than offering purely self-guided experiences to customers, support to provide a guide for small groups who showcase the unique history and wildlife of the area along the way, stopping at other experience providers and enjoying local food and drink.

2.3 Learning from best practice

The diagram below (Figure 5) displays areas where product currently exists within National Parks in England. We will work to expand beyond the domestic product offer in these areas and create new product that can be transformed into motivational and globally appealing experiences.

Figure 5: Best prospects for product development



Case Study – West Country Farm Tours, Exmoor National Park



- A developing business established two years ago offering bespoke farm and food visits across Exmoor National Park, with the potential to expand.
- Developing a strong focus on tailor made tours for groups allowing participants to watch the finest food being produced and visit real farms exploring the countryside beyond the farm gate. Each tour includes time spent with the local farmers to gain a real insight into the workings of an English hill farm and opportunities to sample (and purchase) the produce around the farmhouse kitchen table.
- Significant potential to provide tailored tours for overseas tour operators but lacks the knowledge and contacts to progress this.
- The current tours are immersive experiences and locally distinct, but the current marketing doesn't necessarily portray this.

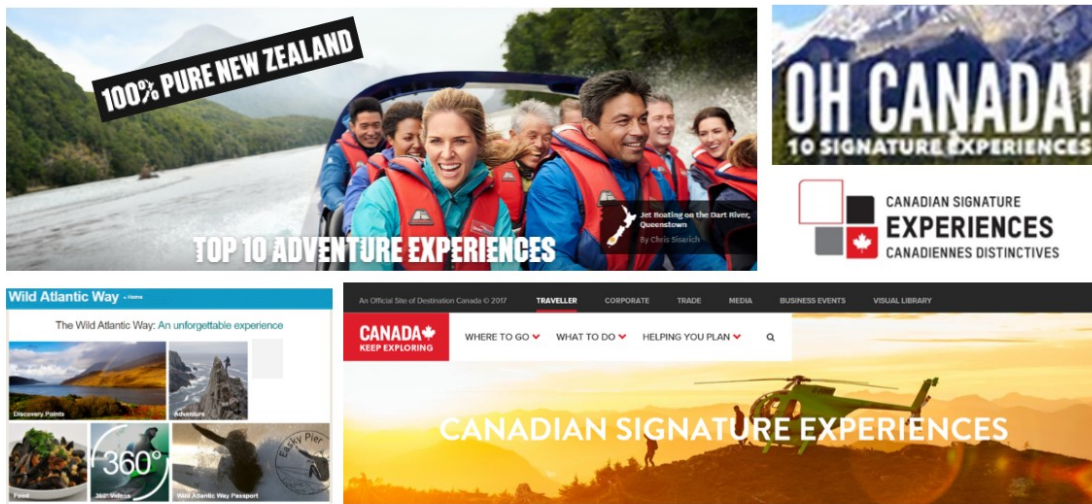
This is a good example of a business that can be taken to the next level through intensive business support to critically evaluate the experiences on offer, develop and enhance them for target market audiences and make them available to overseas tour operators reaching a new audience generating additional spend within the local area. They work with a range of other local businesses (from transport providers to restaurants and local farms) and are an Exmoor National Park Partner.

Case Study – Whale watching off the North York Moors National Park

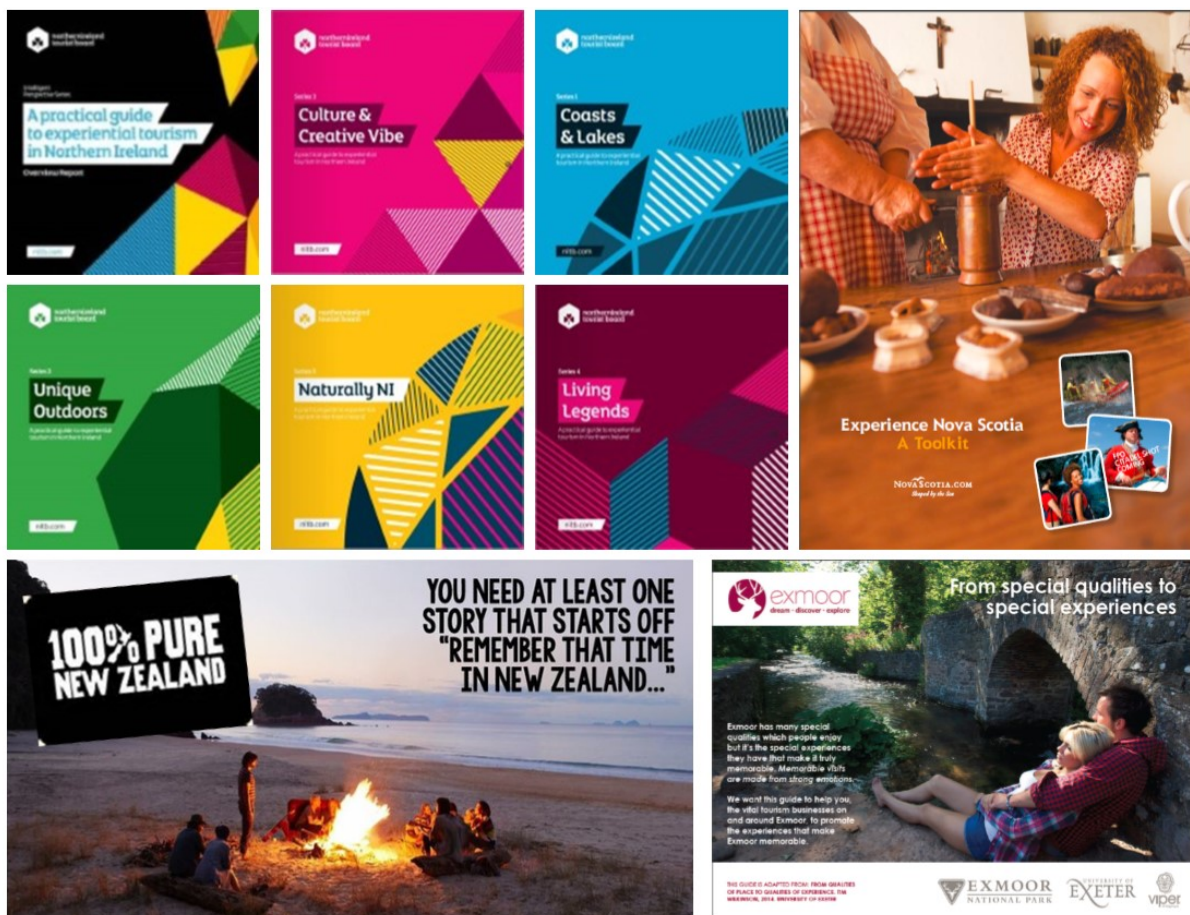
- Whitby Whale Watching diversified from offering standard boat trips out into the North Sea to watching whales that follow the herring migrating here to spawn, as well as seal watching experiences off the National Park coastline. The business works closely with Seawatch Foundation and Orca.
- Over the last few years an increasing number of species have been spotted, including minke, humpback, fin and sei whales, bottlenose and white beaked dolphins, porpoise and seals, along with seabirds, including gannets and puffins.
- With a boat capacity of more than 100 and online booking capability, there is significant potential to provide tailored tours for overseas tour operators but the business lacks the knowledge and contacts to progress this.
- As well as overcoming the disbelief from visitors that whales really do exist off this coastline, the business is also not that confident about how to manage expectations (weather, seasonality, disappointment if whales are not observed).

This is another example of a business that can be taken to the next level through intensive business support to critically evaluate the experiences on offer, develop and enhance them for target market audiences and make them available to overseas tour operators.

Below are a few examples of global best practice creating experiences in iconic landscapes and making memories (further information in Annex 2).



We will be supporting the development of new experiential products through the design of experiential toolkits, similar to those developed in Canada and Ireland, and delivered through business support engagement. The COOL rural tourism project in southern England and northern France supported the creation of the first experiences toolkit for a UK National Park on Exmoor, which will be used as an exemplar in this project.



2.4 Project benefits

This project has the potential to deliver significant benefits for visitors, communities and the nation:

For Visitors:

- Unforgettable memories of inspiring moments experienced in England’s - and indeed the world’s - most loved landscapes.
- A strong desire to come back again, to renew the journey by enjoying other English National Parks.

From the nine commonly experienced visit needs identified in the Mangrove product development report, our project will provide:

Commonly experienced visit needs	How we will achieve this?
Experience Enhancement – Providing visitors with an enhanced, more enjoyable experience that makes the trip truly fulfilling.	Our business support and training programme will help existing experience providers to enhance their overall offer to provide higher value, more immersive experiences to visitors via the travel trade.
Connection and Social – Helping visitors to connect with English people and their way of life, whether urban, rural, historic etc.	Our audiences will leave with the positive associations of a special welcome and a unique and memorable experience which leaves them feeling more engaged in the destination (feeling like a local!) and positive about England and its varied and unique experiences.
Achievement – Providing visitors the opportunity to feel a sense of achievement through tackling a challenge – no matter how small – or trying something new.	Our National Parks are filled with a range of challenges for visitors to conquer and share via social media, family and friends. The project will encourage experience providers to offer activities that make the visitor have a sense of achievement - from the spectacular vista on a walk to baking the perfect scone for that local cream tea!
Responsibility – Travelling with a conscience and minimising the impact on the immediate and broader environment	Encouraging responsible and sustainable tourism is an important part of the work of National Park Authorities and we will build this messaging into the delivery of the project. We will ensure that the experiences developed as part of the project minimise their impact on the natural environment of the National Parks and enable visitors to find their own ways of giving back to the landscapes they have enjoyed.

For England:

- Drive growth in international tourism and increasing export earnings;
- Increase tourism spending in the regions to underpin business growth and jobs and spread the benefits to England’s less advantaged areas;
- Build our international connections post-Brexit;
- Extend the season by the development of shoulder season experiences such as dark skies.

- Promote the best of British food from the National Parks;
- Build the value of and affinity to the National Parks brand as long term curators of England’s finest landscapes;
- Support the government’s priorities for National Park development;

For Local Communities:

- Increased length of stay and spend by international visitors, supporting local businesses.
- Greater appreciation of England’s unique and protected food and drink offer to both overseas and English visitors;
- Strengthened connections between local and regional tourism operators working together to an agreed plan with clear economic benefits for all participants and a pride in the landscape that sustains them.

2.5 How does your proposition solve a problem for the customer; amplify existing product and create new product that responds to international customer demand?

When making a choice about a number of destinations, the potential visitor needs to be inspired by the ‘offer’. The story that National Parks in England have to tell is compelling and through this project will be told through branding, imagery and the availability of ‘must-do’ experiences. It will solve the problem of where to go or how to maximise the enjoyment of their precious holiday time.

2.5.1 Problem-solving

From our intelligence, there are two key problems the project will try to solve from a customer perspective:



I want more than a picnic in the English countryside but I don’t know where to start or where to go when I’m there?

In the 2016 Nations Brand Index Survey, the UK scores low for ‘Rich in Natural Beauty’ (24th/50 nations), however for the Australian market, the perception of the UK’s countryside is more upbeat ranking 10th out of 50 nations. VisitEngland’s report on ‘The role of product in driving regional spread’⁸ shows that the countryside is highly motivating for overseas visitors; but imagery alone is not enough for many visitors as a motivating factor for many visitors. Countryside imagery is just a start to entice many visitors to visit the English countryside, there is a need to connect images to real places with real experiences and people.

The National Parks Experience Collection will showcase the uniqueness and distinctiveness of the countryside in each of England’s National parks. There will be unique and different experiences in each of the National Parks, engaging the visitor on a journey of discovering across England in which

⁸ https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/visit_britain_lb_product_report_fv.pdf

make great memories. Experiences will be easily bookable from home, with transport and accommodation included.



I want to experience quintessential rural English life but I don't how to book this?

Experiences within England's National Parks are not easily bookable by the Australian travel trade at present. Compare this to the excellent bookable experiences from Canada's National Parks for example that are well advertised by travel operators such as Trailfinders.

Within England, existing tour operators appear to focus on the Lake District National Park. This project will provide a solution for potential visitors who know what they want to experience, but don't know at present how to purchase what they want in an easily accessible format.

2.5.2 Amplification and new product

The National Park family has a wide range of experiences which have strong domestic appeal; almost all are delivered through small and micro businesses. From our own knowledge, National Park experience providers have been traditionally reliant on outdoor activity service provision (e.g. walking, cycling, sailing and climbing). This project will support these providers to enhance their offer (moving from a product offer to an experiential offer). These newly focused offers will provide a more meaningful and cultural experience of the National Parks and will create higher value, more meaningful experiences for overseas visitors.

There are many micro businesses involved in delivering guided experiences to visitors involved in National Parks. Indeed, some of the best experiences have emerged from individual tour guides with a particular specialism. A key challenge for the project is to support these operators to offer enough availability to the travel trade and allow the trade to book this easily.

In the early stages of the project, we will undertake an audit of all ten National Parks to assess in some detail how the current offer meets with the expectations of the Australian target markets. This will inform the development of visitor experience plans and the delivery of business support activities.

The project will create a new branded experience collection for England's National Parks, which will draw together the enhanced product range in one place for the travel trade to engage with easily.

A new ranger service product in some of the National Parks (rolling out to others in the long-term) will test using the trusted Ranger brand and expertise to directly deliver experiences to overseas customers.

Section three

Project Activities

3.1 Introduction to project activities

The project will deliver the following activities which are described in more detail below:

- **Planning, preparation and product testing** (Understanding the market and audience, refining our approach, developing a national and local framework for experiences).
- **Developing the product offer** (Business support, training and toolkit development, Ranger-led experience pilot project)
- **Taking the product to market** (Branding, distribution and travel trade engagement)

A project plan is outlined in Annex 4.

Stage 1 – Planning, preparation and product testing

Delivery elements for this stage include:

1. Working with VisitEngland to gain comprehensive insight into the travel values and trip planning behaviour of the Mature Experience Seekers and the Outdoor Enthusiasts in the Australian outbound market. This will be carried out through additional research, focus groups and product testing.
2. Reviewing further international best practices, which could include a Learning Journey to a destination that is regarded as ahead of the curve – such as Australia or Canada.
3. Audit the experience, accommodation and transport offer of all 10 National Parks through the eyes of the Australian market. Identify strengths and weaknesses in the current offer.
4. Developing the preliminary international brand proposition for the National Parks family, and the National Parks Experience Collection.
5. Undertake an assets analysis of all ten National Parks to understand how their current product offer fits with Australian audience needs, with a particular focus on experiences and accommodation.
6. Through external consultants and local workshops, developing an experience development planning framework for the ten National Parks that will provide the methodology to:
 - Identify key themes and storylines in each of the National Parks;
 - Develop local Experience Development Plans ensuring an inclusive consultative process with National Park Authority staff and rangers, local tourism businesses, community organisations, local authorities and Local Enterprise Partnerships.
7. Working with National Park Authority staff and DMOs to ensure an in-depth understanding of experiential tourism, targeted market segments, and the underlying stories and themes.

The experience development plans will bring each National Park to life in a new and invigorated way. They will clearly identify the essence and positioning of each Park and will provide direction for the development of bookable experiences that are:

- Motivational for the Australian market and our target segments within this;
- Capable of increasing length of stay and/or generating economic benefit;
- Aligned to the National Park umbrella proposition and the positioning of the individual National Park.

It is anticipated that there will be approximately 50 experiences. Within these experiences, some may be especially iconic and will be used to showcase the National Parks to international markets and will be the experiences that are presented to the travel trade and media in familiarisation trips and potential itineraries.

At a minimum, these experiences will be evocative and will:

- Highlight what is unique, including leveraging iconic locations;
- Give new meaning to history and cultural heritage within the National Park setting;
- Provide opportunities to experience contemporary rural life;
- Create immersive activities that bring local arts and culture to life;
- Elevate local food and drink in innovative ways.

Stage 2 – Developing the product offer

The implementation of the Experience Development Plans will require a suite of support tools and services to assist tourism businesses and operators with making this behavioural shift from offering activities and services to the delivery of experiences. Looking at how other countries (such as Canada and Ireland) have moved forward with developing experiences, there is clear evidence that success is linked to a dedicated training and mentorship programme. We know from our experience of working with tourism providers in National Parks, they will need assistance with:

- Story and theme alignment;
- Understanding the target markets;
- The process of experience development and how to add new value to existing experiences and activities, including market testing of the experience concept;
- The importance of working collaboratively to develop unique and innovative experiences;
- Digital and social media marketing;
- Creating effective written and visual content;
- Working with the travel trade.

We propose the delivery of an intensive business support and training programme for circa 45 experience providers across the National Park family. Each business will be allocated time with an external consultant who will provide them with bespoke support and advice on a 1:1 basis. There will also be locally delivered training events which will be delivered to groups of businesses to encourage co-operative working. We will also work with an additional circa 45 accommodation providers (most likely hotels with >50 bedrooms) within or close to the National Parks to engage them with the new experience product range, and to support engagement with the Australian travel trade. From this work we will create a set of sample itineraries (matching experiences to accommodation and transport) which will appeal to our target audiences and the travel trade.

To access the support programme, businesses will need to meet a set of criteria which the National Park Authorities, in collaboration with DMOs, will use to assess their potential to deliver the aims of the programme. This set of criteria will also have to ensure that the National Park environment remains protected; a number of National Park Authorities have their own sustainable tourism

accreditation which can support this. These criteria will be finalised in the early stages of the project, but will likely assess:

- Existing quality of offer;
- Length of time in business;
- Their length of season and commercial viability (e.g. can they offer commission to overseas travel trade);
- Appetite / ability to work with overseas markets;
- Licences and planning consents for activities;
- The appropriateness of the activity to align with the National Park ethos.

The application of criteria to enter a business support programme has been successfully used in the development of the Canadian Signature Experiences Collection.

The project will create a series of toolkits to support businesses involved in the project. In preparing this business case we have seen a number of excellent examples of toolkits for example, Tourism Northern Ireland⁹. Toolkits will also be relevant for tourism businesses in the wider English countryside. The business toolkits will likely focus on:

- Creating compelling experiences in National Parks for the Australian market; and
- Travel Trade and media toolkit.

An online portal will be created to provide the industry with resources and to engage the travel trade in the ‘experience collection’ (e.g. provision of listings, imagery, copy, contact details). This will not be a consumer-facing website, and may be password protected.

In addition to the business support and training activities, a sub-project will look at ways to maximise the use of the National Park ranger staff, volunteers and ‘Ranger Brand’ to enhance the visitor experience for international visitors. The National Park family is keen to make more use of Rangers for the delivery of guided experiences, particularly to overseas audiences. The National Park family has not yet progressed this approach as we have not, until now, ascertained the target markets for such a proposition. This project provides National Parks with the basis upon which to develop a clear business model including target market and segmentation analysis to ensure successful delivery.

Through a pilot project in four of the National Parks, we will create a well-researched business case for these National Parks to provide commercially viable Ranger experiences led by rangers and volunteer rangers. This will release additional investment from those National Park Authorities in provision of a sustainable guided experience service. Through this pilot project, we will also develop a toolkit to assist other ranger teams to develop appealing experiences. This will be applicable not just within the National Park family, but in other land management bodies with Rangers such as the Wildlife Trusts, RSPB and Forestry Commission.

Stage 3 – Branding and distribution to travel trade

Stages one and two will develop a ‘collection’ of experiences which have the potential to ‘cut-through’ to the Australian market and to support accommodation providers to engage with these

⁹ <https://tourismni.com/Grow-Your-Business/toolkits-and-resources/>

experiences. Section four will describe how the collection of experiences will now be used to engage the travel trade to generate additional revenue for businesses.

Section four

Branding and travel trade engagement

4.1 Introduction to branding and travel trade engagement

Following the activities in Section three, a collection of circa 45 flagship experiences (and supporting accommodation) will be ready for use by the travel trade towards the end of the project. This section outlines how the travel trade will be engaged with the National Parks Experience Collection so that the experiences and supporting accommodation can be easily purchased by consumers in our target market.

The project is focussing on a purely travel trade approach. This approach was initially used by the Canadian Signature Experiences programme successfully and it will enable us to focus on our target audiences in Australia.

4.2 Branding the National Parks Experience Collection

This collection of experiences will be branded to ensure global appeal and captivation. There are many examples to be found globally of where existing natural product has been re-branded to create an emotional and motivational proposition that is now on the international ‘must-experience’ list (see Annex 2).

This stage in the project plan will align both the re-branding of the National Parks with the new experience collection suite of global stand-out experiences. England’s National Parks must first develop a new and compelling brand. The experience collection will become the vehicle through which visitors in Australia (and elsewhere) will enjoy the National Parks by engaging in compelling and memorable experiences that will define the uniqueness of the place.

The travel trade will then be encouraged to utilise this new suite of unique experiences and to use the National Park offer as a hook within our chosen market to sell England internationally. The ‘National Parks Experience Collection’ is simply a working title at this stage, the brand commission will look at the appropriate title for the collection of experiences; importantly ensuring differentiation from the ‘Canadian Signature Experiences Collection’.

This branding exercise is well-timed with a wider project led by National Parks Partnerships and National Parks UK to enhance the domestic brand of the National Parks family. To ensure consistency between international and domestic branding, this will be delivered as one branding project within this programme. Funding has been applied for from the Heritage Lottery Fund to support this, and this is included as cash match-funding for the project.

4.3 Delivering the Experiences Collection to the Travel Trade

4.3.1 Itineraries

The project will present a set of sample itineraries for all the National Parks to encourage the Travel Trade to engage with the project and create their own bespoke itineraries based on the National Parks Experience Collection. The project will present a flexible solution to make the Experiences available as either add-ons to a wider ‘holiday of a lifetime’ or traditional historic city focused programme, or as the ultimate ‘National Parks Experience’. Therefore, we will create:

- Single National Park experiences (1-2 days)
- Single National Park multiple experiences (1-3 days)
- Multiple National Park experiences (2-3+ days)

We have noted how other overseas markets promote multi-centre tours of different National Parks successfully. The geography of England’s National Parks (Figure 6) naturally creates northern and southern regions which provide a real proposition for international airlines flying into Birmingham, Manchester and Newcastle, either as return flights or as an ‘open-jaw’ proposition with the more traditional gateway of London Heathrow. An ‘open-jaw’ trip is where a guest arrives at one location and leaves from another. The family of National Parks lends itself well to a Northern or Southern National Park Tour. A ‘Grand Tour’ of all ten National Parks may be ambitious, but these concepts will be tested further with the travel trade in the early stages of the project.

Figure 6: Map showing the location of England’s National Parks



The itineraries will include full contact details and liaison officers, prices and booking / contracting instructions but not limited to:

- Pre-written itineraries and explanations;
- Hotels, sorted by size / quality and rates;
- Restaurants, Pubs and cafes, group rates;
- National Parks Experience Collection operators, product and rates;
- National Park Information Centres and Museums;
- Other commercial outlets (farm and retail shops), discounts and offers;
- Museums / Heritage visits and ticketing details;
- Brit Rail Pass / Local bus tickets, rates;
- Electric Car / car / bike rental opportunities, rates;
- Photo / video gallery.

All the relevant content and imagery for each National Park will be stored in a section of the online industry portal. Access will be offered to specific Product Managers of relevant tour operators. It will be updateable by the businesses featured in the collection; they will be able to change prices, photos and update itineraries and input new programming and content.

Awareness of the regional airports is already strong with Australians, accounting for 7% of all arrivals into Newcastle, 6% into Manchester and 3% into Birmingham (VisitEngland Gateway report¹⁰). Well trained travel agents or tour operator reservation staff will maximise the guest's experience by using the best airline routes to suit their holiday itinerary. The daily flights into Manchester, Birmingham and Newcastle from Dubai with Emirates Airlines will provide opportunities for our guests from the connecting airports in Australia.

4.4 Targeting the Travel Trade

It is proposed to make the National Parks Experience Collection available to four sectors within the travel trade market. Selected businesses within the four sectors will be offered access to the Experiences product and the opportunity to benefit from a co-operative marketing funding programme. The National Parks' project team will work with the VisitBritain Product Development and Distribution team to maximise the opportunities and make best use of those with the pertinent expertise. In this regard we will also be liaising with UKInbound to ensure that all opportunities are considered for the product and also for potential partners.

To date we have had positive communication with Eithad Airways, Qatar Airlines, Emirates Airlines, House of Travel and Trafalgar Tours. Records of these discussions are included in Annex 7.

1) Fully Independent Travel (FIT)

We will identify and create a working relationship with key Australian and global FIT operations, such as Flight Centre or Hello World. We will create and develop key co-operative marketing programme with selected operators and in return, provide access to the unique experiences programme.

¹⁰ https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/discover_england_regional_gateways_reportv4.pdf

- Flight Centre - www.flightcentre.com.au - Traditional UK cultural cities with Cornwall and the Cotswolds as wider destinations.
- Hello World - www.helloworld.com.au – include an excellent bookable activity section, featuring day trips to North York Moors, Yorkshire Dales, Lake District, Peak District, Dartmoor and Exmoor among others.

Relationship initiated – working with Visit Britain Product Development and Distribution Team

Supported by – sales mission, travel shows and Familiarisation (Fam) trips for agents

Reaches consumer – through operator website and co-operative marketing

2) Coach operators

We will identify one or two key international coach operators to offer National Park Experiences relevant for large groups, possibly the likes of Trafalgar or Globus who represent multiple markets. It is important that we manage the impact of coach operators as some National Parks are trying to carefully manage the impact of coach travel on their environments. Therefore, we will work carefully with coach providers in planning routes.

- Trafalgar Tours - www.trafalgar.com/uk/ - Examples of tours include Best of Devon and Cornwall featuring Exmoor and Dartmoor, and Best of Britain's Summer, including Hadrian's Wall and the Lake District.

Relationship initiated – working with Visit Britain Product Development and Distribution Team

Supported by – travel shows and Familiarisation (Fam) trips for agents and drivers

Reaches consumer – through operator website, brochures and co-operative marketing

3) Small Group tour

The geography of the National Parks lends itself to a smaller vehicle, exploiting access to more remote locations but without losing the group dynamic of being hosted and guided. The project team would identify operators such as Back Roads touring and other UK based operators such as Mad Max Tours to support the ENP's Experiences Collection.

- Backroad Tours - backroadstouring.com/uk-and-ireland – Examples currently include Corners of Cornwall featuring Dartmoor and Highlights of Britain featuring the Lake District and the North York Moors.

Relationship initiated – working with Visit Britain Product Development and Distribution Team, UKInbound and directly with operator

Supported by – travel shows and Familiarisation (Fam) trips for agents and drivers

Reaches consumer – through operator website, brochures and co-operative marketing

4) Destination Management Company / UK Ground Handler

We will also identify a key UK based ground operator feeding into the Australian market place to ensure our coverage is delivering the programme outlined above both in FIT and group travel. This will help travel agents and specialist group operators in Australia have

access to the National Parks Experience Collection despite not having the capacity to fill an entire coach by themselves. This is a common practise in the international touring market.

Working with Visit Britain, UKInbound and ETOA we would look to work with a larger UK Ground handler and/or a number of specialists (walking, archaeology, art for example) to deliver The National Parks Experience on the ground.

- Backroads Tours could also handle bespoke groups or on a more local basis organisations such as MadMax Tours - www.madmaxtours.co.uk/ - who currently feature the South Downs National Park.
- A larger inbound ground handler such as JAC Travel with access to their worldwide travel partners - www.jactravel.co.uk/group-tours/agents

Relationship initiated – working with Visit Britain, UKInbound, ETOA and directly with operators.

Supported by – travel shows and Familiarisation (Fam) trips for agents

Reaches consumer – through operator website and co-operative marketing

4.5 Engaging with the Travel Trade

4.5.1 Airline Partnership

One of the key elements of this project will be our chosen Airline partner(s), who will work in partnership with tour operators and the collection. Subject to further guidance from VisitBritain, this partner would be asked to participate in our sales missions, educational trips and co-operative marketing programme, with a view to the airline being the primary carrier for the National Parks Experience Collection.

It is important that the airline not only flies from multiple departure points in Australia, but also to multiple entry points in the UK. As such, our preferred partner is likely to be a GCC (Gulf Cooperation Council) based carrier. Due to its spread of UK departure points our most logical partner would be Emirates Airline. However, we also recognise that Etihad, Qatar and BA are potential partners in this project.

Currently Emirates fly into London, Birmingham, Manchester and Newcastle creating the widest possible combination of arrival and departure points and offer our guests the opportunity to visit as many National Parks as possible.

4.5.2 Sales missions

Following the branding and ‘packaging’ work for the ENP’s Experiences Collection, we propose to directly inform, educate and promote the collection by running two sales missions to Australia (one each in 2018 and 2019). This will be delivered in conjunction with VisitBritain’s existing sales mission programme, a partner airline such as Emirates and trade partners in Australia such as Flight Centre, where we will participate in their consumer Exhibitions. The schedule will involve directly training relevant travel trade staff to sell the experience collection effectively, while meeting the consumer at shows. Table 8 outlines the project’s financial contributions to sales missions.

Table 8: Financial contributions to sales missions

Sales Mission	DEF Spend	Partner Organisation	Partner spend
2018 x 5 passengers	£31,000	Airline / Operator / VB	£15,000
2019 x 5 passengers	£31,000	Airline / Operator / VB	£15,000
TOTAL	£62,000		£30,000

4.5.3 Trade shows and events

The project will raise the profile of the National Parks Experience Collection with the inbound trade by attending relevant events. It will include participation at ITB in Berlin in March 2018 and 2019 with VisitBritain, as well as the UKInbound Conference in February 2018 in Cardiff and the same event in 2019. These events will offer exposure to key personnel in the international travel sector and help deliver the best results for the project.

We will also attend the VB Explore GB and the Meet the Media events, ensuring that the press are aware of the Experience collection, thus helping position England’s National Parks in the mind of the Australian Traveller as a “must do” during their trip to England.

Table 9 summarises the project’s financial contributions to these shows and events.

Table 9: financial contributions to trade shows and media events

Trade Shows and Media Events	DEF Spend	Partner Organisation	Partner spend
Schedule: - ITB '18 & '19 UKInbound '18 & '19 Explore GB '18 & '19 Meet the Media '18 & '19	£30,500	VisitBritain UKInbound	FOC FOC
TOTAL	£30,500		

4.5.4 Familiarisation Trips

Once the collection has been finalised we will work with VisitBritain, the airlines and the operators to allow key personnel in product and reservations to experience the products directly in each of the National Parks. It is proposed that we run four familiarisation trips during the length of the project aimed at product managers and travel agents. The trips would take place in the spring and autumn to ensure that hotels have the capacity and willingness to participate.

The anticipated cost of running the trips will be shared with our airline partner and the ground programmes required in terms of hotels, transportation, experiences and subsistence. We would propose 2 x 10 attendees from tour operators plus 2 x 10 attendees from partner travel agents.

Table 10 outlines the project’s financial contributions to familiarisation trips.

Table 10: financial contributions to familiarisation trips

Familiarisation visits	DEF Spend	Partner Organisation	Partner spend
Schedule: - Sep 2018 North Oct 2018 South Mar 2019 North Feb 2019 South	£49,500	Partners: - Airline Hotels Ground transport Experiences	£58,500 £10,000 £1,500 £1,500
TOTAL	£49,500		£71,500

4.5.5 National Parks Experience Collection Presentation

The project will create a series of promotional products to share with travel trade staff at training sessions along with consumers encountered at travel shows and exhibitions attended as part of the sales missions. This will include literature as well as branded goods and it is anticipated that 30% of the budget would be raised by co-operative marketing partners. To help raise co-operative funds and help create a trackable proposition for the literature created, promotional offers can be included in the piece for partners who offer supplementary products, such as meals in cafés and restaurants and discounts in local produce shops or galleries.

The literature can also be created as a ‘passport’ showing how many of our visitors have attended all the National Parks, with potentially a complete ‘passport’ receiving a prize or certificate recognising their achievement¹¹.

Table 11: financial contributions to Collection presentation

Presentation	DEF Spend	Partner Organisation	Partner spend
Literature	£10,000	Airline / Operators	£5,000
Branded Goods	£10,000	Airline / Operators	£5,000
TOTAL	£20,000		£10,000

¹¹ <http://www.eparks.com/store/home/9221/Theme-Passport/>

4.5.6 Co-operative marketing

The National Parks Experience Collection will be taken to market exclusively by the Australian travel trade partners highlighted above with a comprehensive partnership marketing, advertising and promotional campaign, introducing the Experiences Collection to the Australian marketplace. The campaign will feature a specific call to action based on both traditional off-line and new on-line opportunities, support Australian consumer events and delivering creative campaigns aligned to the key branding messages delivered in the Branding Piece.

Table 12: financial contributions to co-operative marketing activity

Partnership	DEF Spend	Suggested Partner Organisation	Partner spend
Public Relations	£20,000	Emirates*	£15,000
FIT	£20,000	Flight Centre	£10,000
FIT	£15,000	Hello World	£10,000
Coach	£15,000	Trafalgar	£15,000
Small Group	£10,000	Back Roads	£5,000
Airlines	£20,000	Emirates**	£20,000
TOTAL	£100,000		£75,000

* To support press trips and bloggers

** To promote preferred carrier status of National Parks Experience Collection

4.6 Sustainable Travel and the National Parks Experience

Transport is an important element for visitors enjoying the visits to England’s National Parks in terms of their flight to England, how they travel to and between the National Parks and move around the National Parks when they arrive. It is important to note that many National Park Authorities have strategic objectives to reduce the impact of visitor traffic and over the years have developed novel sustainable travel schemes. As well as developing a sustainable travel toolkit and options for the FIT itineraries we will work with the operators to ensure that the most appropriate transportation methods are used to highlight and safeguard these iconic landscapes. The programme will look to work with the following modes of transportation.

4.6.1 Car rental

Visitors may be travelling as frequent independent travellers (FIT) or groups. It is envisaged that tour operators / travel agents creating FIT holidays will already have an existing relationship with a car rental company. However, the project team may approach a car rental agency to explore the possibility of them becoming an official provider for the project. As part of the itinerary development it is proposed that public transport options will also be identified for visitors not wishing to self-drive or travel as part of an organised group.

The programme will also include, where relevant, local information for the ‘last mile’ initiatives also delivered under the Discover England Funding for electric car rental, such as the “E-Car Now”¹² programme and other electric car providers. The Lake District National Park has developed a visitor focused car-rental programme from key stations¹³.

4.6.2 Rail

Many National Parks, such as the South Downs and Lake District have particularly good rail connections to London, and therefore this will include working with relevant train operators and the Brit Rail Pass programme currently being developed by VisitBritain. We will encourage accommodation and experience providers to offer station collection services for their guests (this is already in place in many businesses)¹⁴.

4.6.3 Coach and bus

Similarly, national and regional bus operators will be identified to help deliver tourists to strategic destinations and utilise similar passes to the Brit Rail pass where possible. Many National Park Authorities have good relationships and experience with transport operators (e.g. the GoAhead Group) from the development of seasonal visitor bus services in some areas. We will use these relationships to enhance the offer for visitors.

4.7 Consumer Engagement

The end result of the National Park Experience Collection is that a greater number of Australian travellers are travelling to and enjoying an incredible experience in an English National Park. We believe that through the trade education and engagement as outlined above that consumer demand will be stimulated by appropriate brand marketing. Furthermore, the trade shows, fam trips and promotional products will ensure that the agents convert their clients initial request into a confirmed booking for the National Park Experience Collection.

¹² www.ecarnow.co.uk

¹³ http://www.co-wheels.org.uk/lake_district

¹⁴ In line with Private Hire Vehicle regulations.

Section five

Outcomes and impacts

5.1 Outputs, outcomes and impacts

It is important for the project to demonstrate a strong link from output to long-term impacts. We have estimated the outputs and outcomes for the project below, we will continue to refine these further with the Fund evaluator and the VisitEngland evaluation team.

Table 13: Output, outcomes and impacts for this project

Outputs (methods of measuring)	Initial Outcomes by March 2019 (methods of measuring)	Longer-term outcomes by March 2020	Impacts by March 2027
250 individuals attending workshops / events (Registration sheets. Immediate follow up survey, 12 month follow up survey by email)	250 individuals have improved skills and knowledge (measured by follow up survey with participants)	At least 60% of businesses involved in the programme reporting growth in turnover and profitability (business surveys)	<p>Growth in value of the visitor economy in the National Parks from Australian visitors by 5% per year (measured through annual STEAM reports).</p> <p>Increase in employment supported by visitor economy (measured through annual STEAM reports).</p> <p>Increased awareness/reputation of the UK countryside offer in the Nations Brand Index among Australians (currently 12/50, predict move to 8/50)</p> <p>Extended visitor stays within National Parks to 4.3 average (measured through National Park visitor surveys and STEAM from baseline of 3.88).</p>
1x new online travel trade/ tourism industry portal created. (Creation of website)	20,000 industry website visits (Google analytics)	70% of businesses involved in the project have introduced or adjusted their product towards an experiential approach (by repeating audit of experience providers delivered in year 1 of project and making a comparison)	
3x toolkits created for experience providers, accommodation providers and ranger services. (Toolkits created and available in print and online)	1000 printed copies of toolkits 2000 downloads from industry website (Google analytics)		
45 experience providers (5 per park average) to receive intensive business support and training. (Application forms to join the programme, records of each business support visit detailing advice given)	35 high quality experiences included within the National Park experiences collection ready for the Australian market ¹⁵ . 75% of businesses involved in the project have implemented advice / training (business surveys). 100 initial purchases of collection experiences through Travel Trade (through contract with the Travel Trade partners we will gather sales data).	5% increase in the value of Australian visitors to England's National Parks (measured through percentage of Australian visitors in National Park visitor surveys and International Passenger survey).	
45 accommodation providers supported to access the Travel Trade. (Application forms to join the programme, records of each business support visit detailing advice given)	35 accommodation providers supported to package experiences within the National Parks Experiences Collection alongside accommodation to the overseas travel trade.	6000 purchases of collection experiences through the travel trade (monitored through agreement with tour operators)	
4x National Park Authorities supported to develop their Ranger-led experience offer (three business cases developed and implemented)	4x National Park Authorities have confidence to invest in delivering year-round Ranger-led experiences to international markets.	At least 200 Australian visitors participating in ranger-led guided experiences in the National Parks (records and feedback kept by pilot ranger projects)	
4x familiarisation trips to England by Australian travel trade (Evaluation report for each fam visit). 2x sales missions to Australia to meet and educate Australian reservations teams, product and media departments.	40 travel agent and tour operator reservations staff visiting at least 3 National Parks Meet 50 sales staff, 10 product staff (sales mission log created to record).		
Participate in 4 inbound trade shows and 2 annual VisitBritain Meet the Media	Engagement with 10 overseas product managers and 10 overseas journalists about the		

¹⁵ We will aim for 45 business, but achieving 35 is a reflection of a small number of businesses that may not reach the criteria within the first two years

events.	collection (media log)		
Deliver co-operative marketing activity with at least 5 travel trade partners.	Promote Experience Collection with 2 x FIT operators, 2 x group operators, 1x airline.		

5.2 Return on Investment

Estimating the return on investment from this programme is challenging because of low sample size data for current Australian visits to National Parks, and a lack of evaluation data from comparable programmes (such as the Canadian Signature Experiences Collection). Table 14 shows the current estimated value of Australian outbound tourism to England’s National Parks using the Scarborough Tourism Economic Activity Monitor (STEAM) report. The current value of Australian outbound tourism to the economies of England’s National Parks is £55.8 million compared to £418.84million for the whole UK¹⁶.

Table 14: Baseline value of Australian and international visitors to the economies of England’s National Parks (and their influence areas)

A	B	C	D	E	F	G
National Park and influence areas	Economic impact (2015) ('000)	Staying visitors average length of stay (days)	Percentage international visitors	Percentage Australian visitors	Estimated value of international tourism ('000)	Estimated value of Australian tourism to English National Parks ('000)
Broads NP + IA	£584,241	5.34	2%	0.29%	£11,684.82	£1,694.30
Dartmoor NP + IA	£184,225	3.62	7%	0.65%	£12,895.75	£1,197.46
Exmoor NP + IA	£263,612	4.64	8%	0.70%	£21,088.96	£1,842.65
Lake District NP	£1,234,907	3.70	13%	2.43%	£160,537.91	£30,008.24
New Forest NP + IA	£320,737	4.18	7%	0.45%	£22,451.59	£1,443.32
North York Moors NP + IA	£608,476	3.35	5%	0.72%	£30,423.80	£4,381.03
Northumberland NP + AA	£167,865	4.23	3%	0.31%	£5,035.95	£517.02
Peak District NP + IA	£576,905	3.75	3%	0.38%	£17,307.15	£2,215.32
South Downs NP + IA	£437,913	2.86	6%	0.82%	£26,274.78	£3,590.89
Yorkshire Dales NP + IA	£604,576	3.65	7%	1.48%	£42,320.32	£8,947.72
English National Parks + IAs	£4,983,457	3.88	6.10%	0.82%	£350,021.03	£55,837.94
Source	STEAM 2015	STEAM 2015	NPA visitor surveys	NPA visitor surveys	STEAM data multiplied by visitor survey data	STEAM data multiplied by visitor survey data
Limitation notes	Economic model based on a wide range of different inputs	Includes domestic visitors	Small samples of international visitors in visitor surveys		Doesn't include the wider economic impact of a larger visit to the UK overall	

NP = National Park

¹⁶ <https://www.visitbritain.org/markets/australia>

IA = Influence Area

We offer two approaches to estimate the return on investment for this project:

Estimating changes in the economic value of tourism in England’s National Parks

The Canadian Signature Experiences programme is the closest comparison to our project globally. From further enquiries, it does not have a robust Return on Investment analysis; therefore this project will develop a global benchmark for similar type programmes globally. A very simple assessment of direct (e.g. increased sales) and indirect (e.g. changing perceptions of England within Australia market) may result in a 5% or 10% annual growth in the value of Australian tourism by 2027. At the very least this illustrates the potential for National Parks to deliver economic growth. The average annual growth in the value of tourism in England’s National Parks and their influence areas from 2012-2015 was 2.5% per annum. Therefore we suggest scenarios of 2.5% or 7.5% above this.

Scenario 1 – 2.5% growth (above 2.5% average annual growth) in the value of Australian tourism to England’s National Parks by 2027.

Annual growth in value of Australian tourism to National Parks (£’000)	Value of Australian tourism to National Parks (£’000)	Year
348.9871	56,186.93	2019 ¹⁷
702.3366	56,889.26	2020
1,066.674	57,955.94	2021
1,448.898	59,404.84	2022
1,856.401	61,261.24	2023
2,297.296	63,558.53	2024
2,780.686	66,339.22	2025
3,316.961	69,656.18	2026

Total growth: £13,818,240 = **ROI 1:13.8**

Subtract 2.5% organic growth, results in total growth: £6909.1199 = **ROI 1:6.9**

Scenario 2 – 7.5% growth (above 2.5% average annual growth) in the value of Australian tourism to England’s National Parks by 2027

Annual growth in value of Australian tourism to National Parks (£000)	Value of Australian tourism to National Parks (£000)	Year
697.9743	56,535.91	2019
1,413.398	57,949.31	2020
2,173.099	60,122.41	2021
3,006.121	63,128.53	2022
3,945.533	67,074.07	2023
5,030.555	72,104.62	2024
6,309.154	78,413.77	2025

¹⁷ The 2015 STEAM data has been used as a proxy for 2019. The 2019 report would be used in final evaluation.

7,841.377 86,255.15 2026
Total growth: £30,417,210 = **ROI 1:30.4**

Subtract 2.5% organic growth, results in total growth: £23,508,091 = **ROI 1:23.5**

Estimating the return on investment from business support activities

An evaluation by SQW in 2013 of tourism business support activities in Scotland¹⁸ identified that the economic impact of these activities is particularly challenging to directly evaluate because:

- “the benefits go much wider than the businesses that participate in the various destination activities
- it takes time for improvements in the “customer experience” to be reflected in more visitors and additional expenditure
- the nature of much of the activity that has been supported is inherently harder to quantify and includes some “overheads” in building trust and relationships
- the investment climate, for large and small investments, is likely to have limited the “leverage” of the support and this reduces the scale of the impacts (for example even though businesses may know more about their market, they lack the resources to do anything about it)
- there are also inherent difficulties for businesses in attributing benefits to activities that will only indirectly lead to better performance. For example learning from others or accessing market information may help in make better decisions, but businesses will find it difficult to link the outcomes of these decisions to any particular piece of advice or information.”

Therefore it is important when we evaluate the impact of this project that emphasis is placed on the behavioural changes within the businesses participating and perceptions of the contribution of the project, in addition to whether or not businesses are able to report returns in the short term.

An evaluation of Scottish Enterprise’ business support programme by SQW suggested that out of 560 businesses actively involved in the programme, 18% reported a positive impact on sales delivering an average value increase in sales growth per business per year of £16,000 (net GVA effect after deadweight and displacement = £7497 per business per year).

However, it is important to note that our DEF project will provide more focused support aimed at 100 businesses, rather than a small amount of support to many businesses. Businesses will be chosen for the programme based on their potential to effectively operate with the overseas travel trade, and completion of the programme will enable the business to benefit from specific travel trade activity from participating in the National Parks Experience Collection.

We expect that the sales revenue of experiences to increase substantially. While there is little evaluation of the economic impact of the Canadian Signature Experiences Collection, one of the few statistics available in the VisitEngland case study is that all businesses reported that the collection led to an impact of 3-20% on year-over-year sales¹⁹. Based on the limited data or proxy available, we suggest a crude net GVA for businesses participating in the programme would move from £8,000 per

¹⁸ Extract from http://www.sqw.co.uk/files/9813/9136/5164/Tourism_Destinations_report.pdf Pages 36 - 42.

¹⁹ https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/the_canadian_signature_experiences_collection_15_nov_2016_final.pdf

annum in 2019 to £16,000 per year by 2027. Multiplied by 100 participating businesses would result in a net GVA of £800,000 per annum in 2019 and £1,600,000 per annum by 2027. Over the ten year period the net GVA of the project could be: £10,800,000 giving an **ROI of 1:10.8**.

5.3 Delivery of evaluation

A £30,000 DEF budget has been allocated to evaluation in 2019-20, supplemented by £70,000 cash investment from the National Park Authorities over two years. This will cover:

- The National Park family will centrally commission STEAM reports annually as part of this project. This will continue beyond the project end date on an annual basis.
- National Parks each have different schedules for commissioning face-to-face visitor surveys: some are annual, some are biannual. We will agree a national approach for undertaking visitor surveys so the data is more consistently gathered. The Fund will contribute £1,000 to the delivery of a face-to-face visitor survey (circa £3-5000 per survey) in each National Park in 2019-20.
- There is a question in the International Passenger Survey which asks whether visitors included a visit to a National Park (7%). This is helpfully consistent with NPA Visitor Surveys (6% average). We will work with VisitBritain to monitor changes in this figure.
- We will keep auditable records of all engagement with businesses as part of the project, included notes from business support visits, training workshop attendance, conference attendance.
- Businesses and individuals which participate in the programme will be asked to complete evaluation forms after each support activity; they will receive a survey 12 months later to assess wider outcomes and impact. Participants in the experiences collection will be surveyed annually to report on the impact of the programme on their business. This was undertaken in the management of the Canadian Signature Experiences Collection. Through surveys of businesses participating in the programme, it should be possible to monitor changes in profitability and the creation of GVA, should businesses be willing to sharing this information. As discussed earlier, follow-up surveys should place emphasis on the behavioural changes within the business and perceptions of the contribution of the project.
- In working with Travel Trade partners, we will ensure that data collection is included within contract templates to enable evaluation activities.

In 2019/20 we will commission an external evaluator (£20,000) to review all the data and records collected throughout the programme, carry out a follow-up survey with participant businesses, and assess changes in STEAM data, visitor survey data and the International Passenger Survey.

Section six

Project finances and compliance

6.1 Project budget

We are seeking an investment of £1million from DEF to deliver this project, with Australia the target market. This is shown in Annex 1.

6.2 Match funding

Cash match-funding has been identified as follows. This is included within the total project spend.

Source	Activity	Amount	Status
Cash contribution from businesses participating in the business support & training programme	Business support and training activities	£10,000	Unsecured, but low risk. The project team will be responsible for ensuring this figure is realised.
Heritage Lottery Fund – Resilient Heritage Fund	Brand development for the National Park family.	£30,000 (as part of a wider bid of £245,700).	Unsecured. Stage 1 bid has been submitted; a final decision on a stage 2 bid is expected in late August 2017. Initial discussions with HLF have been positive but at this stage this is at medium/high risk.
Cash contributions from Lake District NPA, Peak District NPA, Dartmoor NPA and Exmoor NPA	Ranger-led experiences pilot project.	£30,000	Secured
Cash contributions from National Park Authorities	Contribution to overall budget, particularly for Regional Project Managers who will support delivery within each National Park.	£90,000	Secured
		Total: £160,000	

Monetised in-kind contributions

Source	Activity	Amount	Status
Staff time from National Park Authority Sustainable Tourism Officers (£180 per day – manager level)	15 days per annum support for local delivery of project activities	£48,600	Secured

Source	Activity	Amount	Status
Staff time from National Park Authority Lead CEO, Sarah Fowler (£300 per day – director rate)	20 days per annum support for local activities	£12000	Secured
Cash contributions from National Park Authorities	Evaluation contributions for STEAM reports conducted annually.	£63,000 (£3,500 per park per year)	Secured
Venues (TBC)	Room hire for regional stakeholder events	£2000	Unsecured (low risk)
Venues (TBC)	Room hire for Partnership board meetings	£2000	Unsecured (low risk)
Travel trade partners	Co-operative marketing activity with Australian tour operators	£75,000	Unsecured (medium risk)
Travel trade partners	Sales missions to Australia	£30,000	Unsecured (medium risk)
Travel trade partners	Familiarisation trips to the UK	£71,500	Unsecured (medium risk)
		Total: £304,100	

Monetised in-kind funding from the Travel Trade is currently unsecured, as relationships with travel trade partners are yet to be finalised. We will work with VisitBritain’s product development team to secure these partnerships in the early stages of the project.

We expect to be able to secure additional cash and in-kind match funding throughout the programme. We are not currently in a position to estimate the value of these sources of funding which may emerge from:

- Using our existing consumer partnership with Ordnance Survey to develop mapping materials for the overseas travel trade (particularly for the National Parks Passport concept).
- Our new national partnership with Columbia Sportswear, secured by National Parks Partnerships, may provide us with further promotional opportunities.
- Additional cash investment from National Park Authorities in the delivery of Ranger pilot projects once the well-researched full business case has been made.
- Additional in-kind investment from National Park Authorities in visitors surveys.

6.3 Risk management

An initial risk register has been developed for the programme (Table 15). This will be updated by the project manager on a regular basis and shared with the Partnership board.

Table 15: Project Risk register

Risk category	Risk identified	Risk status (High/Medium/Low)	Management measures	Residual risk status (High/Medium/Low)
Project management & Governance	Short fixed-term contract makes staff retention difficult, affecting project delivery.	High	Interim project manager consultant procured to deliver early stages of project.	Medium
Project management & Governance	Breach of EU travel packaging directives by travel trade partner	Medium	Travel trade partners are required to have adequate financial protection, and demonstrable compliance with the EU Package Travel Directive 1990.	Low
Project management & Governance	State Aid	See 6.4 below		
Project management & governance	Match-funding cannot be secured	Medium	Match funding will be secured before the project is commenced.	Medium
Output delivery	100 businesses cannot be recruited to participate in the project due to various reasons	Medium	Support services heavily subsidised to encourage participation.	Low
Output delivery	Ranger pilot business case does not lead to investment in service delivery by relevant NPAs	Medium	Partnership agreement with relevant NPAs to agree to invest should the business case prove viable.	Low
Reputational risk	Travel trade partners	Low	We will undertake a due diligence process with all travel trade partners. UK National Parks have a due diligence process for corporate partners which can be used for this purpose.	Low
Reputational risk	By targeting long-haul markets such as Australia we increase the carbon footprint of the National Parks (or the perception of doing so).	High	Statement prepared in advance of project commencing assessing the risks of this, which can be used for press statements if required.	Medium
Reputational risk	Local experience providers deliver activities which damage National Park environments	Medium	All experience providers are assessed against a set of criteria before entry into project activities. Training provided in the	Low

			purposes of NPs.	
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6.4 State Aid

A solicitor at the Peak District National Park Authority has completed a state aid assessment of the elements of the bid and has concluded that the elements either do not comprise state aid or fall within an allowed exemption from notification. They have taken into account the agreement concluded in Dec 2013 with the EC and UK Authorities on public funding of tourism activities.

The relevant exemptions are:

- De Minimis Regulation (COMMISSION REGULATION (EU) No 1407/2013 noting that special rules apply to agriculture, fisheries and transport sectors
- article 18 GBER (COMMISSION REGULATION (EU) No 651/2014) (Consultancy for SME's)
- article 53 GBER (operating aid for cultural or heritage institutions)
- Under articles 18 and 53 a contribution will need to be made from non-public funds by the beneficiary. This cannot be funded by way of "top up" through the de minimis exemption

Where funding is being applied by the National Parks towards external consultancy fees the Services will be purchased at market price following procedures under the Public Contract Regulations 2015 or the EU Commission interpretative communication on sub threshold procurements or following benchmarking to evidence market price. Detailed state aid advice is included in **annex 6**. The main risks identified are:

- Cumulation of de minimis aid such that the de minimis ceiling is breached for a particular beneficiary. This can be addressed by the following measures
 - Ensure "participants" are notified when de minimis aid is being provided, for example when a charge is being made and then discounted
 - Applicants to sign a de minimis declaration and to countersign a suitably worded grant offer letter
 - Administrative monitoring
- Where no state aid exists on basis of no identified effect on trade between member states this is on the basis that the beneficiary is not a large renowned, much publicised institution
- Failure to ensure that the purpose/outcome of the intervention is outside the Authorities' purpose (for example destination marketing, information provision or economic development, promoting their area or conducting thematic promotions) or is discriminatory
- Eligibility of in house costs of National Park Authorities. This should be clarified with the funding body. May have to consider use of external providers.

6.5 EU Package Travel Directive Regulations

The Peak District National Park Authority (PDNPA) and other National Park Authorities will not be selling product directly to the consumer. We will be ensuring that individual experiences are available from the Australian travel trade to re-sell to consumers as part of packages.

It is therefore important that the tour operators we work with demonstrate compliance with the regulations. In selecting travel trade partners we will ensure that they have adequate financial protection in place and demonstrable understanding of their liability for the proper performance of the services and compliance with information requirements.

6.6 Procurement

The Peak District National Park Authority has standing orders which comply with the Public Contract Regulations 2015. All adverts for quotations and open tenders will be advertised on PDNPA’s website: www.peakdistrict.gov.uk/looking-after/about-us/open-government/tenders

All its contract opportunities and awards of contracts that are £25,000 or above will be published on Contracts Finder at <https://www.gov.uk/contracts-finder>

A full audit trail for procurement will be maintained for the project. At the beginning of the project, PDNPA will create an effective system of expenditure log spreadsheets to monitor expenditure and compliance with procurement regulations.

Table 16: Extract from the Contract Standing orders for PDNPA

Estimated value	Procurement Method	Details	Format
Up to £5000	Request for Quotation	At least one written Quotation must be obtained	Order or Contract
£5,001 to £25,000	Request for Quotation	At least three written Quotations must be requested	Order or Contract
Above £25,000 but below EU Thresholds	Tender	At least three Tenders must be invited	Written Contract
Above EU Thresholds	EU compliant Tender	Public Contracts Regulations 2015 must be complied with	Written Contract
Any	Existing Framework Agreement	Must ensure that the Framework is compliant with relevant regulations	

Section seven

Partnership, project management, governance and communication

7.1 About the Peak District National Park Authority

The Peak District National Park Authority (PDNPA) will be the lead organisation and accountable body for this project. PDNPA has been selected because:

- It is geographically located at the heart of England, important for a project covering the National Parks in England.
- Its Chief Executive (Sarah Fowler) is the lead National Park Officer for Sustainable Tourism across all National Parks in England and the UK.
- It has the experience and track record of leading the delivery of large scale partnership projects.

PDNPA has experience in delivering large projects and programmes. Two live grant funded projects, where the Peak District National Park Authority is lead partner are detailed through the links below:

- [£2.4m funding boost for Peak District's 'hidden gem': Peak District National Park](#)
- [€12 million European Union funding to protect vital UK moorlands \(Archived\) - GOV.UK](#)

A previous project MoorLIFE project, which shows PDNPA delivers:

- [Partnership awarded for one of the best EU-funded nature conservation projects in Europe: Peak District National Park](#)

The PDNPA board approved a paper requesting that it act as the lead organisation and accountable body for the Discover England Fund project on 17 March 2017.

7.2 Make great memories in England's National Parks Partnership board

The Partnership board will meet quarterly at a central location to oversee the programme and make key decisions about it. We propose that the Partnership Board will consist of the following people:

- Chaired by Sarah Fowler, CEO of PDNPA and Lead National Park Officer for Sustainable Tourism at an England and UK level. The chair will ensure the project aligns with the work of National Parks England, National Parks UK and National Parks Partnerships.
- Representative from the southern National Park Authorities (Dartmoor, Exmoor, South Downs, Broads).
- Representative from the northern National Park Authorities (Lake District, Peak District, Northumberland, Yorkshire Dales, North York Moors).
- National Representative for relevant DMOs
- National Representative for Local Enterprise Partnerships
- Two independent members from the travel industry appointed through external advertisement and application. Ideally these independent members will have outbound travel industry experience in our target markets and/or expertise in experience provision.

- A representative from VisitBritain/VisitEngland
- Head of Discover England’s National Parks programme manager (in attendance)

The project will primarily be supported by two regional steering groups which will focus on supporting the project team with day-to-day delivery in the context of local issues. This steering group will consist primarily of National Park Authority representatives. The local DMO relationships will be managed by Sustainable Tourism Officers in each National Park with input from the regional project officers. Individual National Park Authorities and DMOs are best placed to manage local relationships with wider groups of local stakeholders through their own established communications channels and consultative forums. There will be interest in this project from many non-traditional tourism industry stakeholders e.g. local communities, environmental NGOs.

To engage with a wider range of project supporters we will hold four regional conferences throughout the project, two in the north and two in the south of England (led by the regional project managers). These conferences will bring together project participants and stakeholders to network, share learning and best practice, and gather feedback on project progress.

In addition to these events, we propose setting up a monthly project e-newsletter and LinkedIn group which will keep interested parties up to date with progress in project delivery. The industry facing website will provide anyone who is interested with access to the best practice toolkits which have been developed and this will be maintained for at least five years after the project has been completed by the National Parks UK portal team.

7.3 Project management and delivery

We will recruit a project team to lead the delivery of the project. This team will consist of:

- Head of Discover England’s National Parks Programme – an experienced programme manager with experience of tourism development and/or the travel trade.
- Regional Project Manager x2 – two experienced project managers who will support the delivery of project activities in the northern and southern National Parks.
- Project administrative assistant – to support the programme manager in maintaining an effective audit trail, organising events and records of meetings.

We anticipate it will take around three months from grant award to the project team being in post, in the interim, a project management consultant will be used to deliver the initial phases of the project. The new posts will be hosted by the Peak District National Park Authority; however, they may work from other National Park Authority offices around England. The costs of employing these staff are included within the project budget on a full cost recovery basis.

Each National Park Authority has committed 20 days of time per year from their Sustainable Tourism Officer to ensure effective local delivery of the programme. The staff are based within every National Park Authority and maintain regular contact with tourism businesses and DMOs. Within the national group of Sustainable Tourism Officers is a wealth of experience from working in DMOs (at a local, regional and national level), the travel trade and the hospitality industry. Appended to this bid

is a draft Partnership agreement with all the other National Park Authorities in England (Annex 5) which will be signed and completed following the bid approval by VisitEngland. This partnership agreement will secure their support for the delivery of the programme.

It is anticipated that there will be a large team of people involved in the delivery of the project: the Programme Team, Sustainable Tourism Officers in each National Park and external consultants delivering a variety of different roles. To ensure the project remains on track and that there is effective internal communication between the virtual project team, we will use the BaseCamp²⁰ online project management system. This has been used successfully to co-ordinate projects delivered across NPAs nationally.

There are three key National Park organisations who will support the project:

National Parks England exists to support policy and practice by coordinating the views of the 10 English National Park Authorities (NPAs).

National Parks UK brings together the 15 National Park Authorities in the UK to raise the profile of the National Parks and to promote joint working. NPUK will support the project by:

- Promoting the experience collection to domestic audiences
- Providing web hosting and web development expertise
- Sharing best practice with National Parks in Wales and Scotland

National Parks Partnerships – responsible for the development of successful commercial partnerships with the National Parks brand. Led by a management board with private sector experts, NPP will support the project by:

- Working with the project to develop the National Parks brand internationally and domestically (through the HLF resilient heritage project match funding).
- Assisting the project team in securing long-term travel trade partnerships and delivering wider benefits from these partnerships for the National Park family.

In addition to the project team, external consultancy will play a key role in project delivery:

- Interim project manager- discussed above.
- The development of a National experience development framework and local visitor experience plans for each National Park.
- The delivery of 1-to-1 business support and training activities, and the creation of toolkits.
- Overseas travel trade engagement consultant – we acknowledge that the NP family has fewer skills in this area, and this is an area where we would like to bring in industry expertise to support us.
- Branding agency support – for developing the experience collection and the wider National Park brand proposition.

²⁰ <https://basecamp.com/how-it-works>

7.4 Support from Local Enterprise Partnerships

We will work with Local Enterprise Partnerships so our project complements their Strategic Economic Plans and complements other investments they are making in the visitor economy. All ten National Park Authorities have strong relationships with their LEPs and we are confident that we can engage with all relevant LEPs in delivery of this project.

We invited all affected LEPs to attend a briefing session at the national LEP conference in London on 27 March 2017. Seven LEPs attended, and several others sent apologies. There was strong unanimous support for the bid and a willingness to work with the National Park family to secure capital investment in the National Park visitor experience. In particular, the LEPs saw a big opportunity to use the business support programme to raise awareness of the current call for EAFRD funding for rural visitor infrastructure and RDPE LEADER programmes. The business support element of our project provides an opportunity to promote the EAFRD funding for tourism infrastructure to businesses to ensure capital investment is directed to projects which will deliver outcomes for Discover England Fund and LEPs.

Northumberland	<i>North East LEP</i>
Lake District	<i>Cumbria LEP</i>
Peak District	<i>D2N2 LEP, Sheffield City Region LEP and StokesStaffs LEP</i>
Yorkshire Dales	<i>York, North Yorkshire and East Riding Enterprise Partnership, Cumbria LEP, Leeds City Region LEP</i>
North York Moors	<i>York, North Yorkshire and East Riding Enterprise Partnership</i>
The Broads	<i>New Anglia LEP</i>
South Downs	<i>Enterprise M3, Coast to Capital, South East LEP</i>
Dartmoor	<i>Heart of the South West LEP</i>
Exmoor	<i>Heart of the South West LEP</i>

Annexes

Annex 1 – Project budget

Annex 2 – Case studies from international programmes and initiatives informing the project

Annex 3 – Analysis of strengths and weaknesses of experience provision to overseas markets in England's National Parks

Annex 4 – Project Plan

Annex 5 – Draft Partnership template

Annex 6 - State aid advice

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Annex 1: Project budget

Annex 2: Case studies from International programmes/initiatives informing the project

This shift toward showcasing National Parks through compelling experiences is **in line with global trends in experiential tourism as travellers increasingly look for authenticity and a way to engage emotionally with local culture and connect with the essence of the place and its people**. Indeed, this has become the most significant and systemic trend in worldwide tourism today²¹.

As Tourism and Events Queensland observes: *Today's guests want more than just to see the sights. They want awe-inspiring, wow stories of amazing people and places they can share with their friends and family. They want to find the hidden gems. They want to see, feel, hear, taste and smell new things*²². Ultimately it can be about the simple things that we take for granted – meeting the locals, doing the things locals do, and eating and drinking what locals do²³.

Given the stature of National Parks in many countries, it is not surprising to see a growing emphasis in profiling these landscapes through promoting unique experiences that capitalise on the natural and cultural-heritage assets. **Australia has led the way with its National Landscapes Programme** which identified 16 of the country's most spectacular regions offering uniquely Australian experiences. In 2005 Tourism Australia and Parks Australia established a new partnership to develop and promote world class, high quality visitor experiences. The objectives were to align these experiences with the international 'Experience Seeker' segment, enhance the value of tourism to regional economies, increase the role of protected areas in those economies, and build support for the ongoing protection of the landscapes.

A series of **Experience Development Strategies** have been created for the National Landscapes through a consultative process with the objective of developing and highlighting signature experiences, together with supporting experiences that profile the essence of each landscape and provide compelling reasons to visit. The programme has reported significant traction and nature-based tourism has grown substantially in recent years – the 3.7 million international nature-based visitors in 2012-13 represented 63% of all international visitors and a growth rate of over 8% on the previous year²⁴. By 2015, the total nature-based international visitors had risen to 4.5 million and represented 69% of the total international market to Australia²⁵.

Within **Canada**, Parks Canada has been working closely with Destination Canada, provincial destination marketing organizations and local operators to produce memorable experiences within the National Parks. In many cases these experiences have become part of the **Canadian Signature Experiences® Collection**. This collection is a qualified inventory of Canadian visitor experiences that **best exemplify Canada's tourism brand, and aims to capture the attention and imagination of**

²¹ SKIFT, *The Rise of Experiential Travel 2014*

²² Tourism and Events Queensland, 2014, Queensland Inspiring Inspirational Travel in Queensland Worksheet series

²³ VisitEngland (One Minute to Midnight & Maru/edr), March 2017, *Discover England Fund Visitor Research Preview*

²⁴ Australia Tourism & Transport Forum, 2014, *Nature-Based Tourism in Australia*

²⁵ Tourism Research Australia, November 2015, *Australian Tourism and Nature-Based Travel*

consumers around the world to entice them to visit Canada now²⁶. As such, the collection provides a “video” of Canada to the prospective traveller. The success of the initiative which was launched in 2011, reflects the integrated nature of the programme with the brand strategy and an array of supporting programmes, including the Explorer Quotient segmentation toolkit and the national, provincial and territorial emphasis on developing experiential tourism and related capacity through training and mentorship.

Destination Canada is supported by partner DMOs at all levels in profiling the collection, and using it to attract the interest of the international travel trade and travel media. In many cases, the provincial and territorial DMOs, such as [Tourism Nova Scotia](#), augment this focus through promoting similar innovative experiences that may not be in the Canadian Signature Experiences Collection. For Parks Canada, the approach to creating experiences that align with specific market segments and their travel values as identified by Destination Canada’s Explorer Quotient programme, has increased the relevance of the Parks to the visitors, and has significantly improved staff understanding of how to connect effectively with visitors and how to develop appropriate experiences.

Similarly, in the Republic of Ireland, **Fáilte Ireland has launched a ‘signature experience’ development programme to bring the country’s three new experience brand propositions to life.** Through a process of consultation with local businesses and community organisations, a series of **Visitor Experience Development Plans** are being created. In the case of Wild Atlantic Way, these plans are designed to showcase Ireland in the international market, extend the season, provide reason for a longer length of stay, and create cohesive signature destinations that celebrate the distinctive qualities of each particular stretch of coast.

A new partnership between Fáilte Ireland and the National Parks and Wildlife Services will build on this approach, and is designed to increase Ireland’s appeal to the international visitor through investing in the tourism potential of the country’s six National Parks. The emphasis will be on targeting two specific international leisure markets – the Culturally Curious and the Great Escapers through developing themed experiences and a Tourism Interpretive Master Plan. The Plan will highlight the unique qualities of each Park while aligning with the umbrella brands (particularly the Wild Atlantic Way) and seeking to raise the collective profile of National Parks as a whole.

These three examples have been cited as they **ALL demonstrate the role National Parks and National Landscapes are playing in countries that have embraced the concept of developing and delivering exceptional experiences to targeted international audiences.** They highlight the significance of iconic landscapes as a setting for world-class experiences and the way in which these experiences in turn add considerable value to the collective brand of the National Parks and Landscapes. They also provide a methodological framework for this project and one that has been used to shape this submission.

Strengthening the proposition

²⁶ Destination Canada, 2011, *Experiences: A Toolkit for Partners of the CTC*

The ability to heighten the overall market profile of the National Parks through creating and delivering new experiences can be significantly enhanced through **building a strong brand proposition for the National Parks as a collective**. To be truly effective in growing international visitation, these two areas of activity need to be carried out simultaneously. Again, the experience of other jurisdictions highlights the value in this approach.

Looking at the role of **Canadian National Parks** as destinations, the building of new experiences was only one approach that was undertaken to enhance consumer awareness, and address the issue of falling visitor numbers. In 2012 Parks Canada initiated a new strategic branding approach to strengthen the underlying brand proposition as a step towards generating a 10% increase in visitation by 2015 and creating new sources of revenue. The emphasis of this approach has been on targeting specific audiences, such as ‘new’ Canadians in large urban settlements, to build on or start making life-long connections with Parks Canada’s heritage places. In addition to developing new experiences for target markets, a number of branding initiatives have been undertaken including:

- Developing a new premium line of branded clothing marketed under the tag line “This Land is your Brand”. The *Memories Collection* and the *Original Collection* are now retailed online through a recently launched Parks Canada virtual store (<https://parkscanadashop.ca/>) and online through Hudson's Bay, including on the ground at their international airport outlets and in Toronto, Vancouver and Banff National Park.
- An increased presence at consumer trade shows in targeted urban areas.
- The development of a Brand handbook and templates for a full suite of promotional tools – made available to all Parks Canada team members across the country.
- Proactive traditional and social media promotion and tourism media relations.

The invitation that Parks Canada extended to the world in 2016 to come and celebrate Canada 150 in 2017 through visiting the country’s National Parks at no entrance cost for the entire year, and the leveraging of Canada’s 150th celebration of Confederation have greatly increased awareness in international and domestic markets. This in turn is contributing to the strengthening of the brand and the demand for unique experiences. Indeed, there are concerns that managing visitation this year could be challenging – particularly at the more iconic parks. Nevertheless, the combination of these initiatives, together with the development of new experiences, including teaching ‘new’ Canadian urban residents how to camp and offering alternative glamping styles, have strengthened the underlying proposition and overall awareness of Parks Canada and the landscapes that it stewards, and have stimulated a growth in visitation.

The importance of creating collective value through a strong brand proposition has also been illustrated in Norway. In 2014 a new visual identity and a brand strategy was launched that encompasses 44 parks, visitor centers, and villages and municipalities. The goal has been to unify stakeholders and to communicate the key messages of experiencing and protecting these special landscapes. The visual identity has been built around the concept of a portal – a gateway or entrance into new and unique experiences. A launch video²⁷ clearly communicates this concept and has a strong emotional undercurrent to the images. The rationale behind the portal concept, is that it continues to give room for individuality while at the same time enhancing the collective appeal

²⁷ <https://vimeo.com/125038792>

through branding guidelines that will provide a launching point for an international marketing campaign.

Annex 3: Analysis of strengths and weaknesses of experience provision to overseas markets in England’s National Parks

Through a workshop with Sustainable Tourism Officers in all ten of England’s National Parks, we have identified the following key strengths and weaknesses of the current set of experiences available in England’s National Parks.

Strengths

- Strong outdoors focus in activity provision and excellent provision for self-guided walks and bike rides in all National Parks thanks to well signed and maintained rights of way networks.
- Compared to international competitors – England’s National Parks are relatively accessible; they are ungated and free to enter.
- A high quality food & drink offer has emerged across the National Parks in recent years; while unlikely to be globally unique, it is a strong supporting element to the overall holiday experience.
- High level of protection for the natural environment and cultural traditions meaning a quality and genuine experience
- National Parks act as a ‘family’ and share best practice but also offer unique experiences in each Park.

Weaknesses

- Much of our offer is focused on domestic visitors and lacks the global uniqueness needed to cut-through to international audiences. While the culture and history element of our National Parks, this does not always feature in experience provision.
- Many outdoor activity providers are very focused on the group, education and corporate markets rather than ‘turn up and play’ visitors and pre-booked small group activities. Little consideration is given to developing products for overseas markets.
- Tourism industry dominated by small and micro businesses who lack the capacity and skills to effectively tap into the overseas travel trade. There is also a challenge in the ability to guarantee supply of activities to travel trade. Some very small providers prefer to customers to book experiences by phone or email, rather than provide online availability.
- The differentiation between each National Park is poorly communicated to the visitor.

Annex 4: Project plan

Annex 5: Draft partnership template

Annex 6: State Aid Advice

Annex 7: Letters of Support