

## **Business Enterprise Survey**

### **Key Findings – changes between 2004 and 2009**

The results show some marked differences in responses between 2006 and 2008. In general these differences have highlighted positive change through such factors as higher visitor spend, increased numbers of visitors staying from areas outside of the region, an increase in the number of new businesses and evidence of a more linked approach to marketing between the Tourist Boards, the AONB and the businesses and also an increase in the number of businesses who market themselves as being part of the AONB. These for the majority succeed in responding to the recommendations highlighted in the 2006 report, which highlighted recommended action points. There are a number of reasons why there has been evidence of positive change over the past few years, these include:

- The 2 year Sustainable Tourism project - which was able to assist businesses and community groups both financially for specific projects and to assist in generating a more linked approach to marketing and networking between the AONB and businesses. Initiatives included: joint marketing through various leaflets, the setting up of the Sustainable Tourism Business Network, supporting businesses through GTBS, website developments and promotion of the businesses via the website, training and familiarisation days and newsletters.
- A high number of accommodation providers responded in 2008 in comparison to 2006, therefore the results may be skewed slightly in terms of visitor spend.

It is difficult to draw direct comparisons between the 4 years that the survey has been implemented due to the way in which the questionnaire has evolved. The majority of questions have changed from 2004 to 2009, however direct comparison can be drawn between 2008 and 2009 and are highlighted below:

- The number of new businesses has declined significantly since the 2008 survey, with only 5% of the businesses being less than 1 year old. This could be due to the current economic climate and that new businesses are reluctant to start up but also that current businesses over a year old are sustaining in the economy.
- Employment within the businesses has increased since 2008 in both full and part time employment. The increase has stemmed from the smaller businesses that employ between 1 and 5 part and full time staff with many more businesses reporting part time employment than in 2008. As in 2008, over half of the businesses recorded less than £50,000 turnover per annum.
- As in 2008 a significant number of businesses stated that their business was operating better this year than last year (over 50%). 70% of businesses recorded an increase of up to 30%

since last year. This is very positive given the current economic climate.

- With regards to visitor spending, there was a significant decrease since 2008 in the amount that visitors are spending per person, per visit. This could be partly due to the increase in the diverse range of businesses that responded and lower numbers of accommodation providers.
- In 2009 there was an increase of 13% of businesses stating that a high percentage of their visitors came from within the Forest of Bowland, 0% of businesses reported this in 2008. This could be partly related to the lower numbers of accommodation providers that responded and a higher number of businesses that might attract day visitors. There was an increase in the number of recorded visitors from Lancashire, Yorkshire and the North West, as well as an increase in visitors from the South; there was no change in the percentage of visitors coming from overseas.
- The number of nights that the visitors stay in the Forest of Bowland has not increased, the maximum length of stay is still 7 nights, although the percentages have increased for 2 to 4 nights and also 5 to 7 nights, the amount of visitors staying for only 1 night has declined. 13% of accommodation providers stated that they attracted high numbers of new visitors. This trend also emerged in the 2009 Visitor Survey.
- In terms of why visitors are coming to the Forest of Bowland, there is little difference between 2008 and 2009; there was a percentage increase in low to medium numbers of visitors visiting for horse riding specifically. Also there has been an increased percentage from medium to high number of visitors for cycling. The most significant change to the percentages recorded was for "visit your business in particular" option, 58% of businesses recorded medium numbers of visitors for this reason, compared to 34% in 2008.
- One of the key findings from 2008 was that the businesses seemed to have a lack of understanding as to the reason for their visitors coming to the area. From the results of this year, the businesses seem to have a better understanding and are engaging more in to why the visitors are here.
- 88% of the businesses now market themselves as being part of the AONB; a slight increase to the numbers from 2008, which is beneficial for both the businesses and the AONB.
- A significant number of businesses have been involved with various Forest of Bowland marketing initiatives, though some of the businesses have become less involved in some areas and more involved in others compared to last year:
- With regards to the European Charter for Sustainable Tourism, this year 88% stated they are aware it has been awarded to the AONB, a 14% increase from 2008.

- There has been a 23% increase in those who have been on a Sense of Place training course from last year, with 89% of those businesses regarding the training as either useful or very useful.
- There has been a positive change with regards to the Sustainable Tourism Business Network and how useful the businesses found it, in 2008 72% of the businesses who were members found it useful or very useful, in 2009 80% of those members now believe it to be useful or very useful.
- 70% of respondents said they would be interested in selling Bowland branded products. The businesses were also asked if any of them would be interested in marketing their business with certain activities, such as walking, cycling, fishing etc. The activities that mostly appealed to the businesses to market themselves along side with were cycling, walking and bird watching.