Forest of Bowland AONB Business Enterprise Survey

Summer 2010

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FOREST OF BOWLAND
Area of Outstanding Natural Beauty

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1.0 Business Enterprise Survey for the Forest of Bowland AONB

1.1 Aims of the enterprise survey

To carry out a survey of tourism enterprises operating in and around the Forest of Bowland AONB, as part of strategic monitoring.

1.2 Background

A visitor and enterprise survey was first conducted in August 2004 as part of research carried out for the development of a sustainable tourism strategy for the Forest of Bowland AONB. The resulting strategies both 2005 – 2010 and 2010 to 2015 and the Forest of Bowland AONB Management Plan (2009-2014) recommend that this survey is repeated at regular intervals in order to better understand our target markets and their needs.

A visitor and enterprise survey with relevant updates was repeated in summer 2006 and 2008 and again summer 2009 to assist in the preparation of the Forest of Bowland sustainable tourism strategy 2010-2015. The visitor survey was not carried out in 2010 but will be administered again in 2011.

Increasing opportunities to enjoy the Forest of Bowland AONB by providing excellent access opportunities is a key remit for the AONB partnership. The Management Plan (2009 – 2014) identifies the need to 'Establish a system for monitoring tourism in the AONB' (section 18.3) – specifically 'To undertake an annual AONB-wide enterprise survey to monitor the economic and environmental performance of tourism businesses'. The business enterprise survey will continue to be administered annually and the visitor survey biennially.

1.3 Methodology

A survey was devised *(Appendix 1)* which was administered online to 120 businesses with email addresses obtained from the Forest of Bowland business network database. The survey followed the same format as 2009 but with some amendments.

2.0 Survey Results

Appendix 1 shows the questions and results from the survey; 34 businesses responded which gives a response rate of 28%, in comparison to 39% in 2009.
All of the businesses who were targeted are members of the Forest of Bowland Sustainable Tourism Business Network and have made a commitment to operating in a sustainable way. This group are active in participating in events organised by the AONB and networking with each other. A cross-section of businesses was surveyed including accommodation providers, cafes/restaurants/inns, visitor attractions and outdoor activity providers.

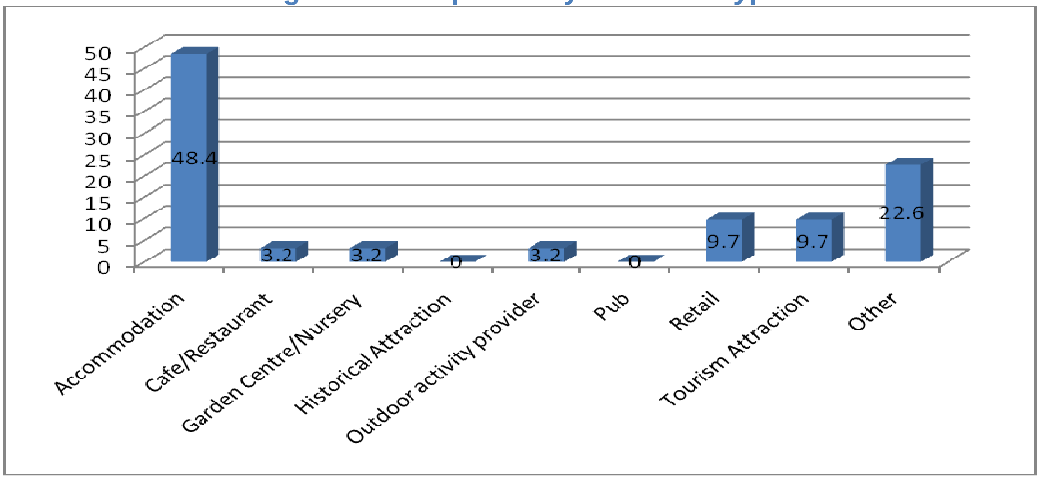
The majority of questions were designed to elicit closed responses; however there were opportunities for businesses to offer more qualitative type responses. The qualitative responses to questions 14a, 18a, 20a, 20b, 21a, 22a, 22b and 24a can be found in *Appendix 1.*
Comparisons to results from the survey in 2009 are made, however, parts of the questionnaire for 2010 have been redesigned to take into consideration development of projects and work undertaken by the AONB over the last year. Some questions from 2009 have been removed (as they are no longer relevant) and also some questions have been

added to obtain a greater insight into new areas of work. A whole new section – *Business Marketing* – has been added for 2010 (Q21 to Q25).

2.1 Response Rate (Q2)

The highest response was from accommodation providers accounting for 48% of the total (same as 2009) with 10% for retail (in 2009 there was no response from the retail sector) and tourism attractions, 3% for garden centres/nurseries and cafes/restaurants. 23% responded in the 'other' category, including an open garden, renewable energy biomass provider, a photographer and web designer and touring and holiday caravans. When compared to actual numbers for each business type in the network, these figures are representative, 50% of the network is made up of accommodation providers.

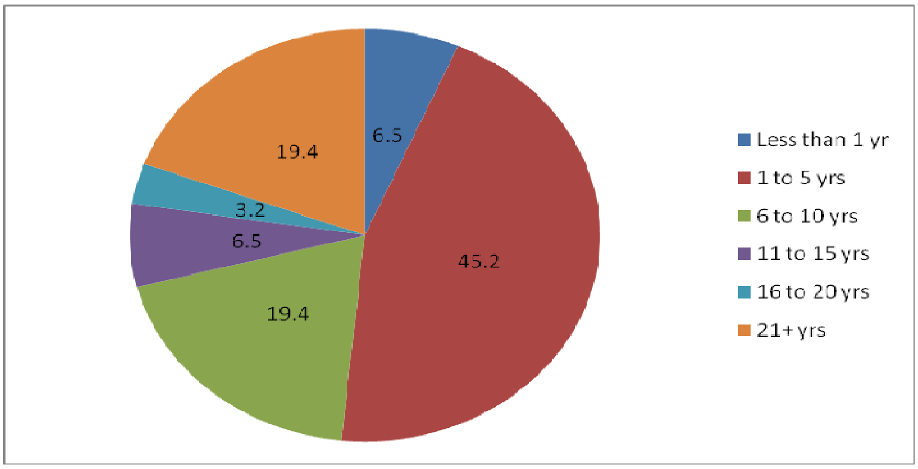
Figure 1 - Response by business type



2.2 About the Business (Q3, Q4, Q5, Q6)

Figure 2 shows that a high percentage of businesses (45%) have been operating for between 1 and 5 years (compared to 52% in 2009) and 19% have been operating for between 6 and 10 years. A lower percentage has been operating for between 11 and 25 years (7%) and for 16-20 years (3%). There is similar percentage of new businesses (6.5%) – operating less than one year – to 2009 (5%). However, 19% have been operating for 21+ years (compared to 9% in 2009) – this probably means that a different set of business have responded in comparison to 2009. 71% have been operating for less than 10 years, a similar figure to 2008 (70%) and 2009 (66%).

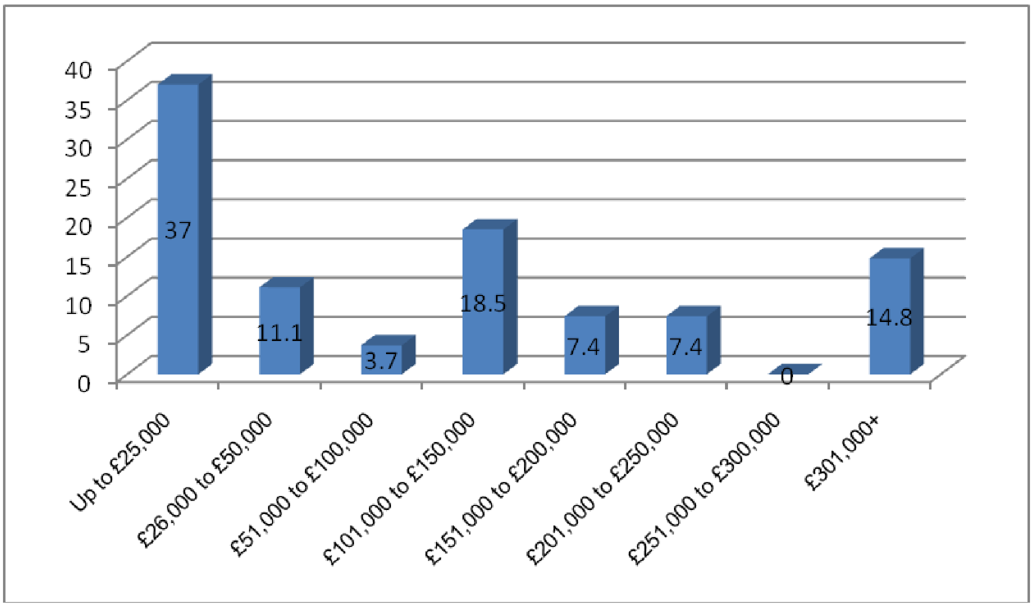
Figure 2 - Length of business operation



All businesses fall into two categories for the number of people they employ. Most businesses within the AONB are small businesses employing between 1 and 5 full time staff (96%) and between 1 and 5 part time staff (96%). There is however a number of larger businesses which employ 21+ full time staff, accounting for 4% of the overall respondents. The number of full time staff that businesses employ has not really changed since the survey was undertaken in 2008 and 2009.

Figure 3 shows annual turnover, 47% have annual turnover of up to £50,000 (37% of which are up to £25,000). The results differ somewhat from 2009 which showed that 61% of businesses were turning over up to £50,000 with little representation in the other categories apart from 10% in excess of £300,000. In 2010 annual turnover has increased - 33% have annual turnover of between £100,000 and £250,000 and 15% £300,000+.

Figure 3 - Annual business turnover

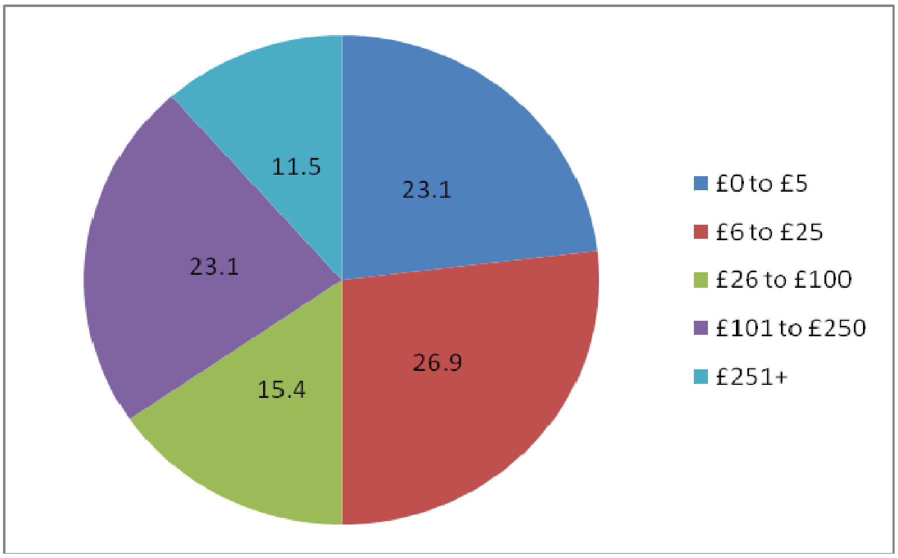


47% state that their business is operating better this year than last year (compared to 76% in 2009) – of those 33% stated they had seen an increase of between 1 and 20%, and 40% of businesses stated an increase of between 21% and 40%. Only 7% of respondents stated that their business was operating worse than last year (compared to 24% in 2009). Compared to the results of the 2008 survey, 21% of the businesses had reported a decrease in business since 2006, therefore the number of businesses recording a decline in business has reduced by nearly 50% - this is a marked improvement and a positive finding for the businesses within the AONB.
The results between 2009 and 2010 are similar, although in 2009 a higher percentage reported that they were operating better than the previous year, whereas in 2010 a higher percentage stated that they were operating the same (this option wasn't given in 2009, which could account for the variance).

2.3 Visitor profile (Q7, Q8, Q9, Q10, Q11, Q12)

In terms of business's opinion of visitor spend per person per visit; the highest figures are in the £0-£5, £6 to £25 and £101 to £250 categories. Figure 4 highlights that there is even spread of spending over all the categories with slightly less in the £251+ bracket. Overall spending has increased since 2009 and the figures are more comparable to those that emerged in 2008. The range in spend could be attributed to the response from a wide variety of businesses from small tea rooms to self catering providers.

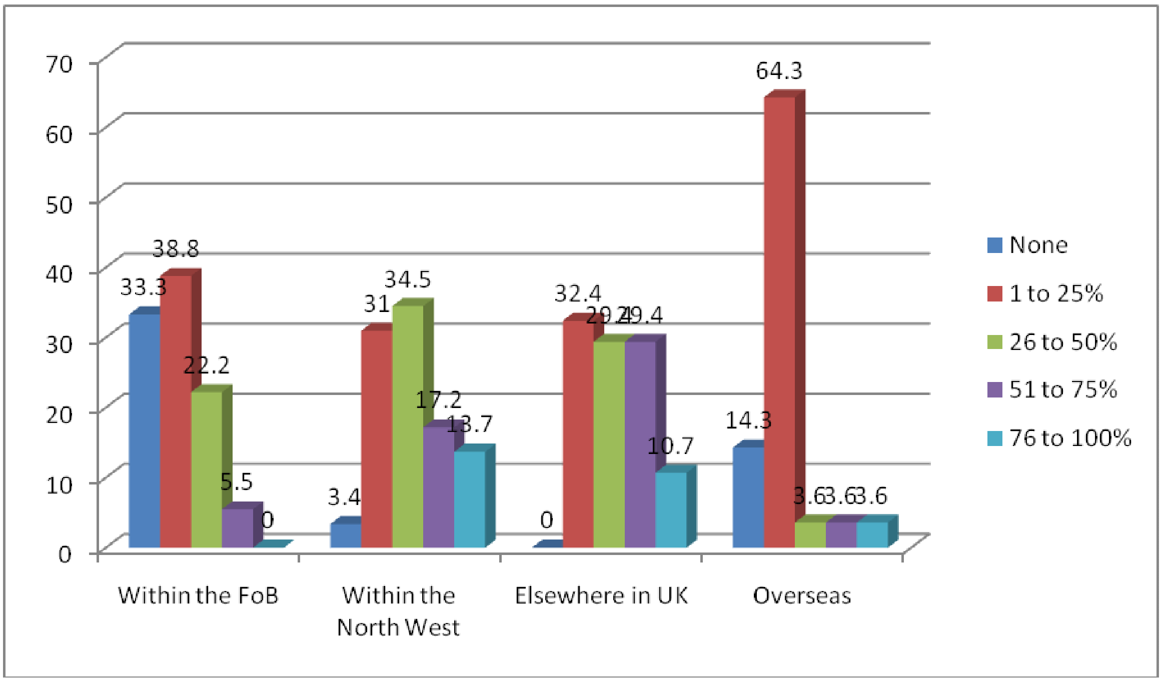
Figure 4 - Daily visitor spend



Only 8% of businesses know their yearly visitor figures, while 23% can make an approximation and 69% do not know; similar to the figures that emerged in 2009.

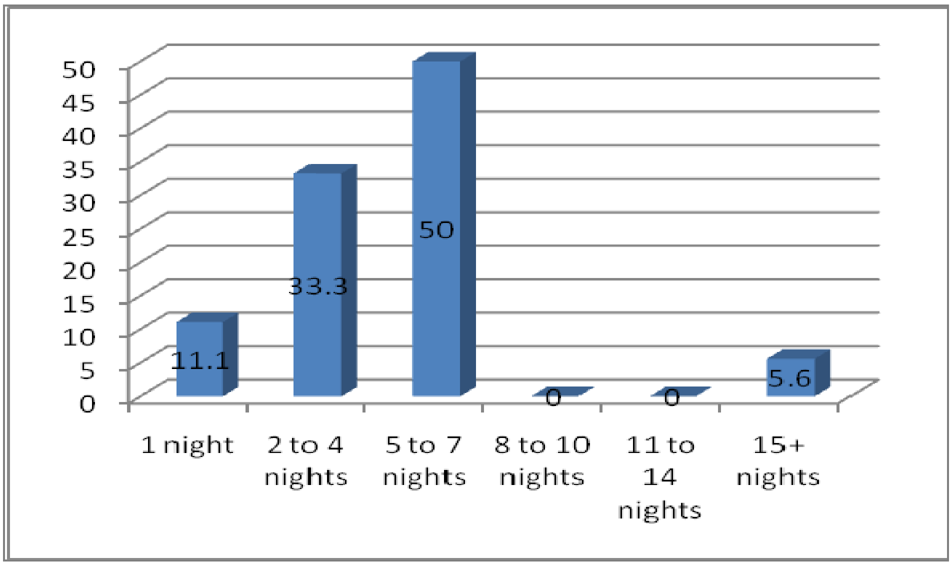
Figure 5 shows where the businesses think their visitors have come from– 61% felt that medium numbers of visitors come from within the Forest of Bowland itself. A higher percentage of businesses felt that visitors came from within the North West. There was a more even distribution across the categories for visitors from elsewhere in the UK with 32% stating low numbers and 29% high numbers. The majority of businesses felt that they had low numbers of overseas visitors – a similar finding to 2009. These patterns, with higher numbers of visitors from the North West and elsewhere in the UK are expected given the high percentage of accommodation providers who responded to the questionnaire.

Figure 5 - Where visitors come from



The survey asked the accommodation providers how long the majority of their visitors stay with them, there was a slight difference in the percentages from 2009. The number of visitors staying for just one night decreased (from 17% in 2009 to 11% in 2010) and the number of visitors staying between 5 to 7 nights increased (from 44% in 2009 to 50% in 2010). One business even reported a stay of 15+ nights. 2009 reported a positive difference from 2008 and again we notice a positive difference between 2009 and 2010. This is a positive change, over a two year period there has been a steady in increase visitors staying for longer. With visitors spending more time in the area there is potential for visitor-spend to be higher, benefitting not just accommodation providers, but all types of businesses.

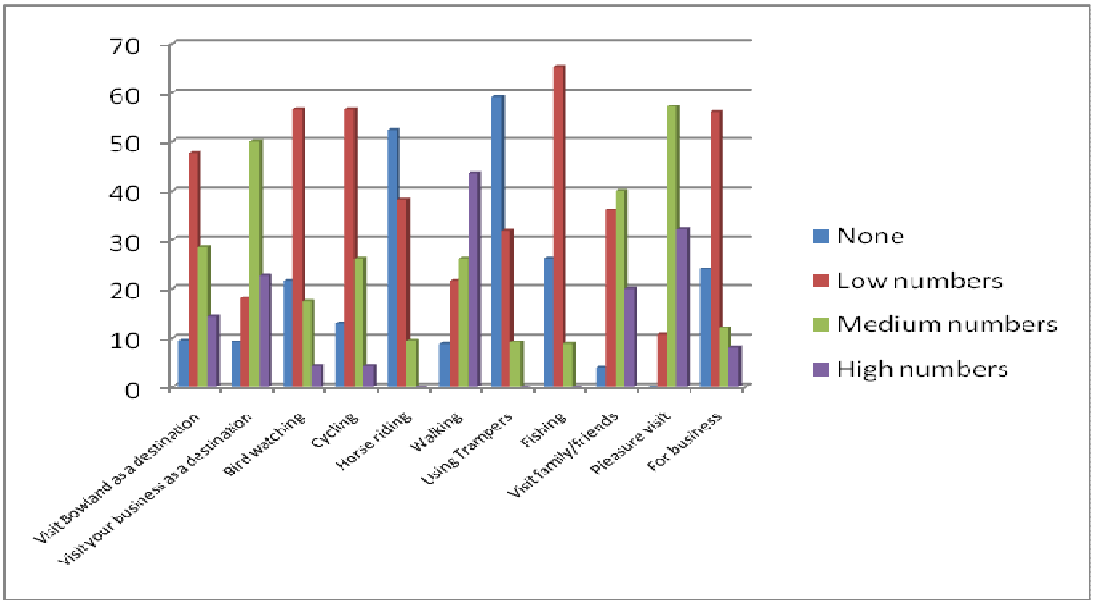
Figure 6 - Length of visitor stay



Accommodation providers were also asked to note what type of visitors they attract, from long stay visitors to repeat visitors. Results are similar to 2009 with medium to high numbers of new visitors and repeat visitors. There is even distribution in all categories for families and groups and low numbers of young couples. A high percentage recorded medium to high numbers of middle aged couples, which is the same as in 2009.

The survey asked businesses to state the main reasons why their visitors came to the Forest of Bowland AONB. Despite the increase in numbers of visitors staying for longer (shown in Figure 5), businesses report low numbers of long stay visitors and medium to high numbers of short break visitors. There is mixed opinion for numbers who visit The Forest of Bowland specifically as a destination, with 10% stating 'none' and 14% stating high numbers, but with a high percentage stating medium numbers. As in 2009 a high percentage felt visitors were coming to visit their business in particular. There were lower numbers visiting the area for bird watching, horse riding, using Trampers, fishing or visiting for business and medium numbers visiting for cycling, visiting family and sight-seeing, higher numbers emerged for those visiting for a general pleasure visit and walking.

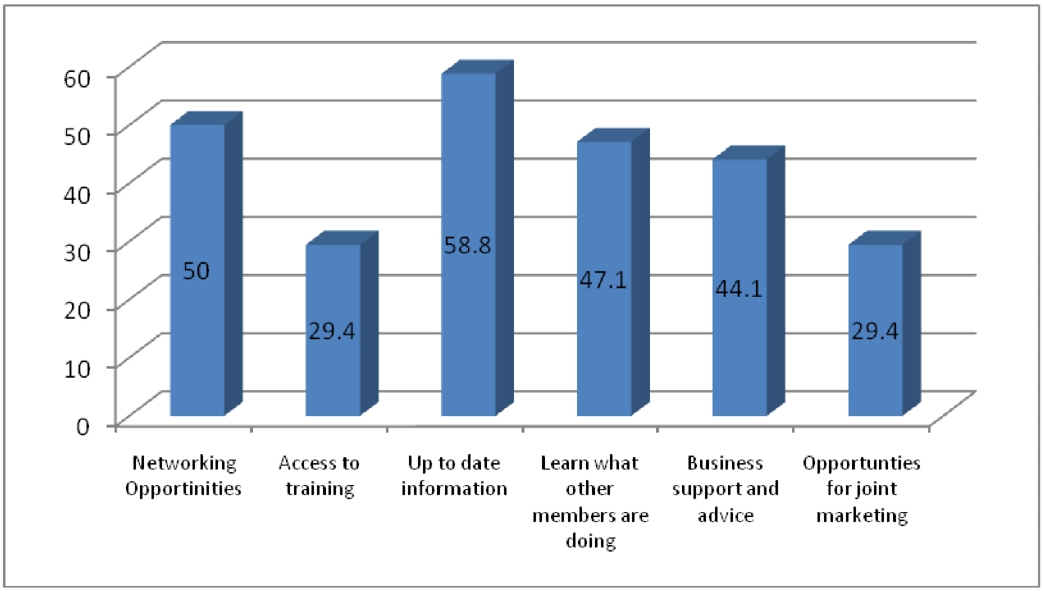
Figure 7 - Visitors' main reasons for visiting the Forest of Bowland AONB



When asked about membership to various organisations, there was a decrease from the results of 2008 and 2009 surveys - Lancashire and Blackpool Tourist Board, Yorkshire Tourist Board, and Forest of Bowland Business Network - all showed a decrease in membership. However, there were increases in the District Tourism Associations and the 'Other' category (which included Farm Stay and GTBS). In order to gain a more realistic picture actual membership numbers will need to be examined rather than basing it on a sample – actual evidence shows that membership to the Forest of Bowland business network has increased significantly since 2009.

An additional question was added for 2010 to establish what businesses find most useful about the Business Network. Businesses have found having access to up to date information the most useful (59%), followed by the opportunities for networking (50%). Businesses also find it useful learning about what other members are doing (47%) and receiving business support and advice (44%). Businesses found it less useful having access to training (29%) and opportunities for joint marketing (29%).

Figure 8 - Most useful elements of the Forest of Bowland Business Network



2.4 Business Membership (Q13 to Q20)

In 2010 instead of asking businesses which marketing initiatives they have been involved with through the Forest of Bowland partnership (as we can ascertain actual numbers from the leaflets themselves) – we asked businesses to assess the *impact* of such initiatives. Out of all the businesses that were involved with any of the marketing initiatives with Forest of Bowland, 74% felt they had had either a big or some impact (similar to results of 2009 when 78% of them thought they were either useful or very useful to their business). 11% felt they had no impact and 16% were unsure.
With regards to the European Charter for Sustainable Tourism, for 2010 79% stated they were aware it has been awarded to the AONB, a decrease from the 88% in 2009. There has been an increase in the number of businesses that market themselves as being part of the Forest of Bowland AONB, the percentage is now 97%, an increase from 88% in 2009. This will create a stronger awareness to visitors about the AONB, and also reflects the increase in the number visiting the Forest of Bowland specifically as a destination, a trend that wasn't present a few years ago (Visitor Survey Report 2009).
There has been an increase in the number of businesses that have used or been on training for sense of place 71% (compared to 46% in 2009 and 55% in 2008). Of those 100% found it either useful or very useful, with 40% (2 businesses) of those who haven't used it wanting to find out more. A course has been advertised for January 2011 and has already received 11 bookings.

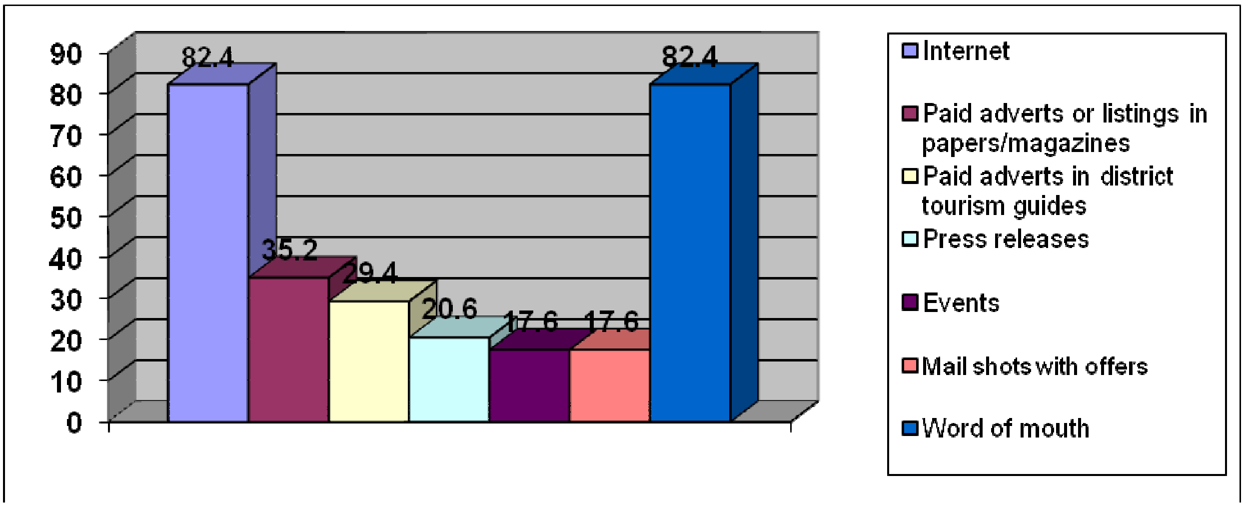
47% of the businesses are now accredited through the Green Tourism Business Scheme (GTBS); in 2008 there were only 26% and 2009 45%. This is a reflection of the continued support within the AONB for those undergoing GTBS accreditation. Of those that are not accredited 56% of businesses stated they would like to learn more about it. Again, these figures need to be read with caution as these are not a reflection of actual numbers accredited with GTBS in the Forest of Bowland. At the time of writing 38 businesses are GTBS accredited and 5 are awaiting grading.

93% of businesses have visited the Forest of Bowland website (same as 2009).
The parts of the website that the businesses found most useful can be found in Appendix 1 (Q20) and include 'all of it', the walking maps, news and events.

2.5 Business Marketing (Q21 to Q25)

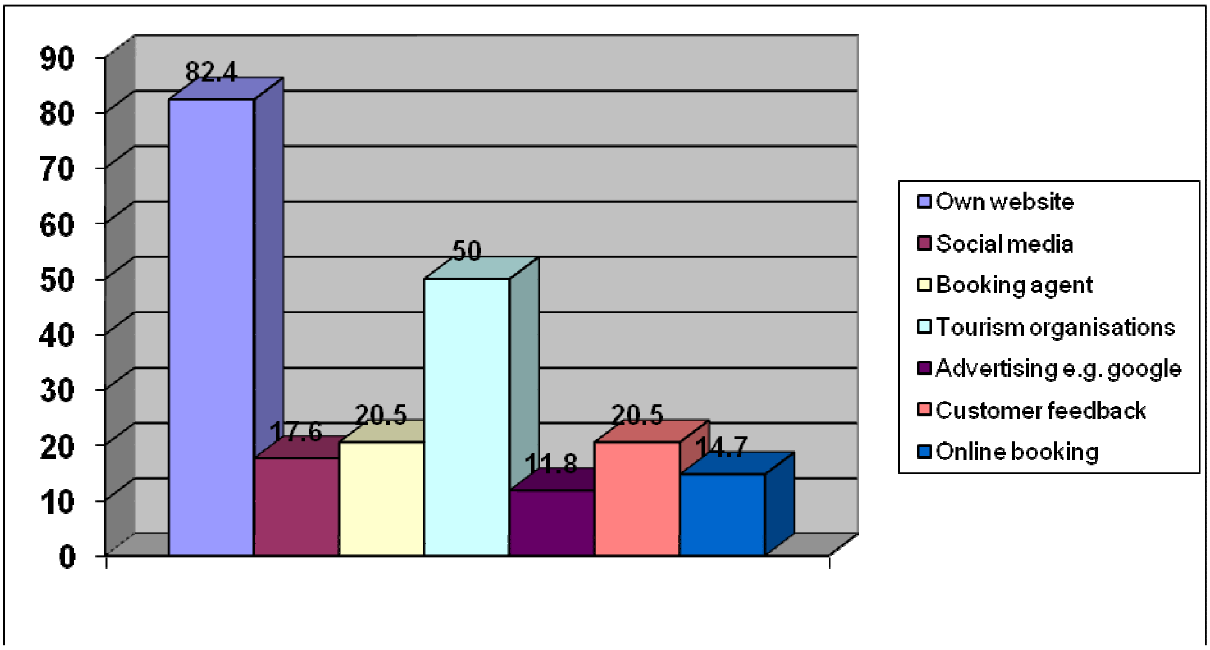
The following business marketing questions were added for 2010 to find out what channels businesses utilise for marketing. The most popular channel by which businesses market themselves is via the Internet and by word of mouth – 82% for each. 35% of businesses pay for adverts or listings in papers/magazines, 29% pay for adverts in district tourism guides. 21% have benefited from press releases which have resulted in TV/radio/ or newspaper coverage and fewer, 18% both market themselves via events or mail shots with offers and promotions. Most businesses stated the most effective channels were via the Internet and word of mouth.

Figure 9 - Channels that businesses use to market their business



With regards use of the Internet for marketing - 82% of businesses have their own website, 50% market themselves via tourism organisations such as Visit Lancashire and Yorkshire, and 21% make use of a booking agent such as Late Rooms and customer feedback sites like Trip Advisor. 18% utilise social media, while 15% use online booking and 12% use advertising on Google. In terms of the most effective for generating business, several businesses felt that it was their own website, while others mentioned a combination of several channels and Google search engines.

Figure 10 - Use of the Internet for marketing



Encouragingly 97% of businesses ask visitors how they found out about their business and a further 80% ask for visitor feedback, and certainly value the importance of this for informing future developments. The high percentage of businesses (66%) invest less than £1,000 per year in marketing with 10% investing £1,000 to £2,000 and 24% over £2,000.

3.0 Key Findings

- Half of the respondents are accommodation providers – similar to 2009. Although for 2010 there is a higher response for retail than 2009.
- Nearly half of businesses are relatively new and have been operating for between 1 and 5 years. But, also there are a significant number of established businesses who have been operating for 21+ years (19%).
- The majority of businesses employ between 1 and 5 full time staff (96%).
- Annual turnover has increased since 2009. The highest response was still in the lowest category (up to £25,000) but a large percentage was turning over in excess of £100,000 and £300,000.
- A high percentage believed their business was more successful or at about the same level as the previous year.
- Overall visitor spend has increased since 2009.
- The majority of visitors are from within the North West or elsewhere in the UK.
- There was a slight decrease in visitors staying for one night and an increase in the number of visitors staying for 5 to 7 nights.
- High percentage of new visitors as well as repeat visitors and a high percentage of middle aged couples.
- High percentage of visitors coming to the area for walking or general pleasure and sightseeing.
- Businesses found having access to up to date information the most useful aspect of the Forest of Bowland Business Network, followed by opportunities for networking.
- A high percentage of businesses felt that joint marketing initiatives with the Forest of Bowland (through leaflets) had had a big or some impact.
- 97% of businesses now market themselves as being part of the AONB.
- An increase in the number of businesses that have used or been on Sense of Place training, and all have found it either useful or very useful to their business.
- The Forest of Bowland website continues to be utilised and valued by a high percentage of businesses.
- The most popular and most effective channels by which businesses market themselves are via the Internet and by word of mouth.
- 82% of businesses have their own website and find this the most effective channel for generating business. A high percentage also market themselves via tourism organisations such as Visit Lancashire or Welcome to Yorkshire.
- A high percentage of businesses gain visitor feedback and value this information for future developments.
- A relatively small amount of money (less than £1,000) is invested in marketing each year by the majority of businesses.

4.0 Conclusions

Overall the report highlights some positive differences from previous years' surveys, especially an increase in business turnover and visitor spend.
The types of visitors coming to the area has remained a constant over the years, mainly attracting middle aged couples, visitors for walking and general sight-seeing.
The survey for 2010 has revealed some new and interesting findings relating to the wide variety of channels by which businesses market themselves, with several now utilising social media and Google advertising. It has revealed that businesses value the Business Network for the opportunities it provides for sharing ideas and accessing up to date information.
Businesses have a good understanding of where their visitors have come from and a high percentage obtains visitor feedback to inform future developments within their business.

Marketing of businesses as being part of the AONB continues to increase, which can be related to the continued work and interest in Sense of Place, and the value businesses place on this for marketing their business and the area as a destination.

5.0 Recommendations

- Continue to grow and develop the Business Network and Bowland Experience to fulfil the value businesses place on the opportunities for sharing ideas and accessing information.
- Continue to provide access and training in Sense of Place, to encourage new businesses and those who have not utilised the toolkit to market themselves as being part of the Forest of Bowland AONB, and supporting the development of a strong identity.
- Look at opportunities for attracting new types of visitors to the AONB including expanding the offer for cyclists, horse riders, bird watchers and Tramper users (currently attracting some visitors, but low numbers – see Figure 7.) This will include continuing the development and promotion of a network of route ways to enable good quality easy access to the countryside.
- Support initiatives which engage with groups that don't traditionally visit the AONB, e.g. families and young visitors.
- Encourage businesses to look at ways of maintaining and extending opportunities for long stay visitors in terms of provision of visitor information, packaging and cluster developments. Also, develop and promote tourism products and events to encourage out of season visits to the AONB.
- Continue to support interest in the Green Tourism Business Scheme and individual business' commitment to operating in a sustainable way.
- Continue to encourage businesses to utilise social media to attract new markets.

APPENDIX 1

Section 1: About your business

2. What is your main business type?			
Accommodation provider:		48.4%	15
Café/Restaurant:		3.2%	1
Garden centre/Nursery:		3.2%	1
Historical attraction:		0.0%	0
Outdoor activity provider:		3.2%	1
Pub:		0.0%	0
Retail:		9.7%	3
Tourism attraction:		9.7%	3
Other *(please specify)*:		22.6%	7

holiday homes- caravans
Inn and restaurant
Open Garden
Photography and design services
Renewable energy
touring caravan site
Web Designer for Tourism Businesses

3. How long have you been operating?			
Less than 1 yr:		6.5%	2
1 to 5 yrs:		45.2%	14
6 to 10 yrs:		19.4%	6
11 to 15 yrs:		6.5%	2
16 to 20 yrs:		3.2%	1
21+ years:		19.4%	6

4. How many people do you employ? (including yourselves)

4.a. Full time			
1 to 5:		96.0%	24
6 to 10:		0.0%	0
11 to 15:		0.0%	0
16 to 20:		0.0%	0
21+:		4.0%	1
4.b. Part time			
1 to 5:		95.5%	21
6 to 10:		4.5%	1
11 to 15:		0.0%	0
16 to 20:		0.0%	0
21+:		0.0%	0

5. What is your annual turnover? (excluding VAT)			
Up to £25,000:		37.0%	10
£26,000 to £50,000:		11.1%	3
£51,000 to £100,000:		3.7%	1
£101,000 to £150,000:		18.5%	5
£151,000 to £200,000:		7.4%	2
£201,000 to £250,000:		7.4%	2
£251,000 to £300,000:		0.0%	0
£301,000 +:		14.8%	4

6. Is your business operating better this year than last year?			
Better:		46.7%	14
Worse:		6.7%	2
About the same:		46.7%	14
6.a. Percentage increase or decrease:			
No difference:		13.3%	2
+ 1 to 10%:		26.7%	4
+ 11 to 20%:		6.7%	1
+ 21 to 30%:		33.3%	5
+ 31 to 40%:		6.7%	1
+ 41 to 50%:		0.0%	0
+ 51%+:		0.0%	0
- 1 to 10%:		6.7%	1
- 11 to 20%:		0.0%	0
- 21 to 30%:		0.0%	0
- 31 to 40%:		6.7%	1

- 41 to 50%:		0.0%	0
- 51%+:		0.0%	0

Section 2: Visitor profile

7. How much do your visitors spend (per person) at your business (on average) per visit?			
£0 to £5:		23.1%	6
£6 to £25:		26.9%	7
£26 to £100:		15.4%	4
£101 to £250:		23.1%	6
£251+:		11.5%	3

8. Do you know your yearly visitor figures?			
Yes:		7.7%	2
Yes, as an approximation:		23.1%	6
No:		69.2%	18

8.a. 2009 figures:

16000
1782 bed nights
180
27,000
33000
35000
42
65000
8000

8.b. 2010 projected figures

16000
1782 bed nights

180
27,000
33000
35000
42
65000
8000

9. Where do your visitors come from? (please estimate a percentage for each one)			
9.a. Within the FOB			
None:		33.3%	6
9.a.i. Within the FOB			
1 to 25%:		38.8%	7
9.a.ii. Within the FOB			
26 to 50%:		22.2%	4
9.a.iii. Within the FOB			
51 to 75%:		5.5%	1
9.a.iv. Within the FOB			
76 to 100%:		0%	0
9.b. Within the North West			
None:		3.4%	1
9.b.i. Within the North West			
1 to 25%:		31.0%	9
9.b.ii. Within the North West			
26 to 50%:		34.5%	10
9.b.iii. Within the North West			
51 to 75%:		17.2%	5
9.b.iv. Within the North West			
76 to 100%:		13.7%	4
9.c. Elsewhere in UK			
None:		0%	0
9.c.i. Elsewhere in UK			
1 to 25%:		32.4%	11

9.c.ii. Elsewhere in UK			
26 to 50%:		29.4%	10
9.c.iii. Elsewhere in UK			
51 to 75%:		29.4%	10
9.c.iv. Elsewhere in UK			
76 to 100%:		10.7%	3
9.d. Overseas			
None:		14.3%	4
9.d.i. Overseas			
1 to 25%:		64.3%	18
9.d.ii. Overseas			
26 to 50%:		3.6%	1
9.d.iii. Overseas			
51 to 75%:		3.6%	1
9.d.iv. Overseas			
76 to 100%:		3.6%	1

10. How long do the majority of visitors stay with you? (accommodation providers only - other businesses go to Q12)			
1 night:		11.1%	2
2 to 4 nights:		33.3%	6
5 to 7 nights:		50.0%	9
8 to 10 nights:		0.0%	0
11 to 14 nights:		0.0%	0
15 + nights:		5.6%	1
10.a. a. Please estimate your annual occupancy levels as a percentage:			
30			
40%			
50			
50%			
50%			
60%			

65
65%
73
80%
campsite not possible, otherwise 35%

11. What type of visitor do you attract? (accommodation providers only) - (select approximate numbers for each type of visitor)			
11.a. Long stay visitors			
None:		12.5%	2
11.a.i. Long stay visitors			
Low numbers:		62.5%	10
11.a.ii. Long stay visitors			
Medium numbers:		25.0%	4
11.a.iii. Long stay visitors			
High numbers:		0%	0
11.b. Short breaks visitors			
None:		0%	0
11.b.i. Short breaks visitors			
Low numbers:		5.8%	1
11.b.ii. Short breaks visitors			
Medium numbers:		52.9%	9
11.b.iii. Short breaks visitors			
High numbers:		41.2%	7
11.c. Repeat visitors			
None:		0%	0
11.c.i. Repeat visitors			
Low numbers:		16.6%	3
11.c.ii. Repeat visitors			
Medium numbers:		33.3%	6
11.c.iii. Repeat visitors			
High numbers:		50.0%	9
11.d. New visitors			
None:		5.0%	1
11.d.i. New visitors			

Low numbers:		5.0%	1
11.d.ii. New visitors			
Medium numbers:		55.0%	11
11.d.iii. New visitors			
High numbers:		35.0%	7
11.e. Families			
None:		23.5%	4
11.e.i. Families			
Low numbers:		29.4%	5
11.e.ii. Families			
Medium numbers:		29.4%	5
11.e.iii. Families			
High numbers:		17.6%	3
11.f. Groups			
None:		31.3%	5
11.f.i. Groups			
Low numbers:		37.5%	6
11.f.ii. Groups			
Medium numbers:		25.0%	4
11.f.iii. Groups			
High numbers:		6.3%	1
11.g. Young couples			
None:		7.1%	1
11.g.i. Young couples			
Low numbers:		64.3%	9
11.g.ii. Young couples			
Medium numbers:		14.3%	2
11.g.iii. Young couples			
High numbers:		14.3%	2
11.h. Middle-aged couples			
None:		5.0%	1
11.h.i. Middle-aged couples			
Low numbers:		0%	0
11.h.ii. Middle-aged couples			
Medium numbers:		55.0%	11
11.h.iii. Middle-aged couples			
High numbers:		40.0%	8
11.i. 65+ couples			
None:		0%	0

11.i.i. 65+ couples			
Low numbers:		47.1%	8
11.i.ii. 65+ couples			
Medium numbers:		23.5%	4
11.i.iii. 65+ couples			
High numbers:		29.4%	5

12. What are your visitors' main reasons for coming to the Forest of Bowland? (select approximate numbers)			
12.a. Visit the Forest of Bowland AONB as a destination			
None:		9.5%	2
12.a.i. Visit the Forest of Bowland AONB as a destination			
Low numbers:		47.6%	10
12.a.ii. Visit the Forest of Bowland AONB as a destination			
Medium numbers:		28.5%	6
12.a.iii. Visit the Forest of Bowland AONB as a destination			
High numbers:		14.3%	3
12.b. Visit your business as a destination			
None:		9.1%	2
12.b.i. Visit your business as a destination			
Low numbers:		18.1%	4
12.b.ii. Visit your business as a destination			
Medium numbers:		50.0%	11
12.b.iii. Visit your business as a destination			
High numbers:		22.7%	5
12.c. Bird watching			
None:		21.7%	5
12.c.i. Bird watching			
Low numbers:		56.5%	13
12.c.ii. Bird watching			
Medium numbers:		17.4%	4
12.c.iii. Bird watching			
High numbers:		4.3%	1
12.d. Cycling			
None:		13.0%	3
12.d.i. Cycling			
Low numbers:		56.5%	13
12.d.ii. Cycling			
Medium numbers:		26.1%	6

12.d.iii. Cycling			
High numbers:		4.3%	1
12.e. Horse riding			
None:		52.4%	11
12.e.i. Horse riding			
Low numbers:		38.1%	8
12.e.ii. Horse riding			
Medium numbers:		9.5%	2
12.e.iii. Horse riding			
High numbers:		0%	0
12.f. Walking			
None:		8.7%	2
12.f.i. Walking			
Low numbers:		21.7%	5
12.f.ii. Walking			
Medium numbers:		26.1%	6
12.f.iii. Walking			
High numbers:		43.5%	10
12.g. Using Trampers			
None:		59.1%	13
12.g.i. Using Trampers			
Low numbers:		31.8%	7
12.g.ii. Using Trampers			
Medium numbers:		9.1%	2
12.g.iii. Using Trampers			
High numbers:		0%	0
12.h. Fishing			
None:		26.1%	6
12.h.i. Fishing			
Low numbers:		65.2%	15
12.h.ii. Fishing			
Medium numbers:		8.7%	2
12.h.iii. Fishing			
High numbers:		0%	0
12.i. Visit family/friends			
None:		4.0%	1
12.i.i. Visit family/friends			
Low numbers:		36.0%	9
12.i.ii. Visit family/friends			

Medium numbers:		40.0%	10
12.i.iii. Visit family/friends			
High numbers:		20.0%	5
12.j. Pleasure visit/general sight seeing			
None:		0%	0
12.j.i. Pleasure visit/general sight seeing			
Low numbers:		10.7%	3
12.j.ii. Pleasure visit/general sight seeing			
Medium numbers:		57.1%	16
12.j.iii. Pleasure visit/general sight seeing			
High numbers:		32.1%	9
12.k. For Business			
None:		24.0%	6
12.k.i. For Business			
Low numbers:		56.0%	14
12.k.ii. For Business			
Medium numbers:		12.0%	3
12.k.iii. For Business			
High numbers:		8.0%	2

Section 3: Business Membership

13. Are you a member of?			
Lancashire and Blackpool Tourist Board:		35.3%	12
Yorkshire Tourist Board:		5.8%	2
Forest of Bowland Sustainable Tourism Business Network:		64.7%	22
District Tourism Association:		35.3%	12
Other *(please specify)*:		32.4%	11

Bay Tourism
BH and HPA holiday parks
Even Welcome to Yorkshire!
Farm Stay, Green Tourism Business Scheme
Green Tourism x 3

national farm attractions network
quality in tourism
Sustainable Business Network
Wyre tourist ass

13.a. If you are a member of a District Tourism Association please state which one(s):

bay x 2
Ingleton
Ribble Valley x 4
RVTA x 2
Settle Accommodation Providers Forum
Wyre x 3

13.b. If you are not a member and would like to find out more about any of the above, please state which:-

Lancashire & Blackpool Tourist Board x 2

14. If you are currently a member of the Sustainable Tourism Business Network, please state what you have found most useful:

Networking Opportunities:		50.0%	17
Access to training:		29.4%	10
Up to date information:		58.8%	20
Learn what other members are doing:		47.1%	16
Business support and advice:		44.1%	15
Opportunities for joint marketing:		29.4%	10

14.a. Please state if there is anything else that you would like from the Network:

I ordered some tourist leaflets from an email link provided and have never received them.

15. Are you aware of the Green Tourism Business Scheme?

Yes, I am accredited:		46.7%	14
Yes, I have heard about it:		43.3%	13
No:		10.0%	3
15.a. Would you like to learn more about the Green Tourism Business Scheme?			
Yes:		55.6%	5
No:		44.4%	4

16. If you have been involved in any joint marketing initiatives with the Forest of Bowland what has been the impact (e.g. Birding leaflet, Fishing leaflet, Wyresdale Wheels for all etc...)			
Big impact:		15.8%	3
Some impact:		57.9%	11
No impact:		10.5%	2
Don't know:		15.8%	3

17. Are you aware of the European Charter for Sustainable Tourism which has been awarded to the AONB?			
Yes:		79.3%	23
No:		20.7%	6

18. Do you market your business as being part of the Forest of Bowland AONB?			
Yes:		96.6%	28
No:		3.4%	1
18.a. If not, why not?			
not really, more focus on locality i.e. Lune valley and surrounding district			

19. Have you used the Forest of Bowland's Sense of Place toolkit or attended a training session?			
Yes:		71.4%	20
No:		28.6%	8
19.a. If yes, how useful was it?			
Very useful:		45.0%	9
Useful:		55.0%	11
Average:		0.0%	0
Not useful:		0.0%	0
19.b. If you have not used the toolkit or attended the training, would you like to find out more?			
Yes:		40.0%	2
No:		60.0%	3

Section 4: Forest of Bowland website

20. Have you visited the Forest of Bowland website?

Yes:		93.1%	27
No:		6.9%	2

20.a. What are the most useful parts of the website?

All of it x 2
downloadable route maps
Events, finding businesses within the AONB x 2
General info x 3
Learning about other activities in the area
links to other businesses
nearly every part look @ the site often to see what is going on and print off posters for our clients
News and events
Up to date information, walk guides etc Business listings
Walking leaflet downloads x 3
Walks available and printable. Martin's blog. Visitors use it before their stay.
We use the Events Guide to publicise exhibitions
What's On Maps

20.b. Do you have any suggestions for changes or additions to the website?

It is VERY GOOD.
Keeping events as comprehensive and up to date as possible; direction to business directory
more downloadable route maps carbon calculator
no

Section 5: Business Marketing

21. Which of the following channels do you use to market your business?

Internet:		82.4%	28

Paid adverts or listings in papers/magazines:		35.2%	12
Paid adverts in district tourism guides or tourist board guides:		29.4%	10
Press releases resulting in TV/radio/newspaper coverage:		20.6%	7
Events:		17.6%	6
Mail shots with offers/promotions:		17.6%	6
Word of mouth:		82.4%	28

21.a. Which of the above are most effective for the marketing of your business?

Internet x 9
Internet and word of mouth
Internet, Ribble Valley tourism brochure, Farm Stay brochure
leaflets
Paid adverts in district tourism guides
Press releases & paid adverts
radio presenter (myself) and events
travel press, mainly national papers
We need to find out.....this is a project for this year
Word of mouth x 5

22. If you use the internet for marketing, which of the following do you use?

Own website:		82.4%	28
Social media (e.g. Facebook, Twitter):		17.6%	6
Booking agent e.g. Laterooms.com or Lastminute.com:		20.5%	7
Tourism organisations e.g. Visit Lancashire, Visit Yorkshire:		50.0%	17
Advertising e.g. Google:		11.8%	4
Customer feedback sites		20.5%	7

e.g. Trip Advisor:			
Online booking:		14.7%	5

22.a. Which online booking provider do you use?

Eviivo x 2
http://www.easy-bookings.co.uk
I use "I know Northwest" x 2
none
own web site
Welcome 21st

22.b. Which of the above are most effective for generating business?

as above
Combo of all
Eviivo
Google search engine
"I know Northwest"
own website x 6
own website/Google/fob
ukcampsitescaravanningsites.com

23. Do you ask visitors how they found out about your business?

Yes:		96.7%	29
No:		3.3%	1

24. Do you ask your visitors for feedback, whether it is informally or formally via a questionnaire?

Yes:		80.0%	24
No:		20.0%	6

24.a. If yes, do you find this useful for informing future developments?

sometimes x 5
Very much x 2
Yes x 8
Yes - we welcome ideas
Yes, we take note of comments & act on them

25. On average how much do you invest in marketing each year?			
None:		0.0%	0
Less than £500:		34.5%	10
£500 to £1000:		31.0%	9
£1000 to £2000:		10.3%	3
£2000+:		24.1%	7