Forest of Bowland AONB Business Enterprise Survey Report Summer 2009

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FOREST OF BOWLAND
Area of Outstanding Natural Beauty

Table of Contents

Table of Figures

1. Business Enterprise Survey for the Forest of Bowland AONB

a. Aims of the enterprise survey

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

b. 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 strategy (action point 5.2.11) recommends 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.
Increasing opportunities to enjoy the Forest of Bowland AONB by providing excellent access opportunities is a key remit for the AONB partnership and access projects have received public funding from organisations such as NWDA and Natural England as well as the AONB partnership.

c. Methodology

The following methods were used in achieving the above aim:

A survey was devised *(Appendix 1)* which was administered online to 120 businesses with email addresses obtained from the Forest of Bowland database.

2. Survey Results

Appendix 1 shows the questions and results from the survey; 47 businesses responded which gives a response rate of 39%.

Of the 120 businesses with email addresses over half are members of the Sustainable Tourism Business Network and have made a commitment to sustainable tourism in the Forest of Bowland. This group are active in participating in events organised by the AONB and networking with each other, therefore this could have contributed to the good response rate.

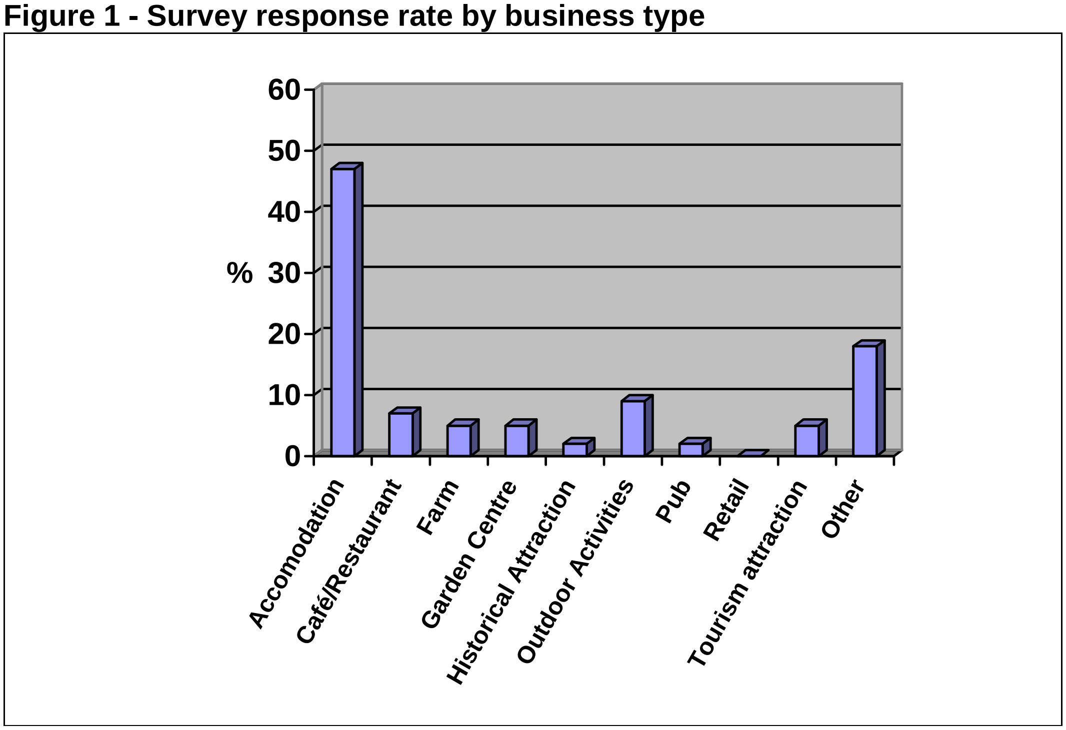
A cross-section of businesses was surveyed including accommodation providers, cafes/restaurants and outdoor activity providers.

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 11a.i, 15, 17 and 24b, can be found in *Appendix 1.*
Comparisons to the data from 2006 and 2008 are made in the results section, however, the questionnaire in 2009 was redesigned to take into consideration development of projects and work undertaken by the AONB over the last year, some questions from 2008 have been removed and also some questions have been added to obtain a greater insight to some areas involving the AONB and the businesses.

2.1 Response Rate (Q2)

The highest response was from accommodation providers accounting for 48% of the total with 9% for outdoor activity providers and 7% for cafes/restaurants. There was also a slight increase in the number of respondents from the 'other' categories compared to the 2008 survey, but there were no representatives from the retail sector. 18% responded in the ‘other’ category, including an arts organisation, renewable energy biomass provider, a village hall and a web designer, these businesses mirror those of the 2008 survey but also included a couple of new business types as well. There was a 16% decrease in the percentage of accommodation providers that responded to the survey compared to 2008, this can be justified by the range and the number of respondents the survey received this year compared to last year.

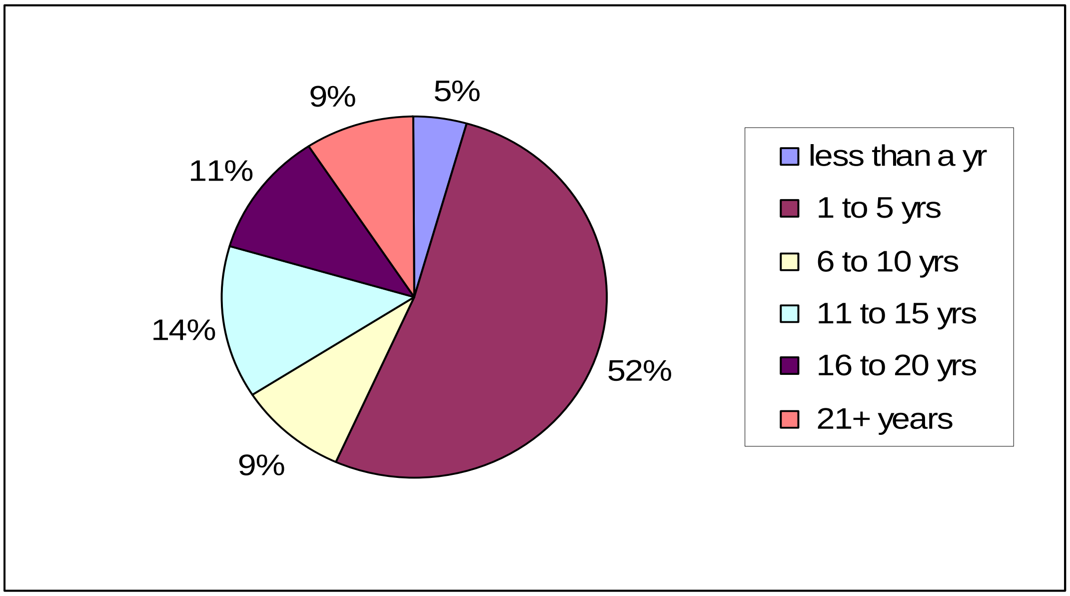
Figure 1 - Survey response rate by business type



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

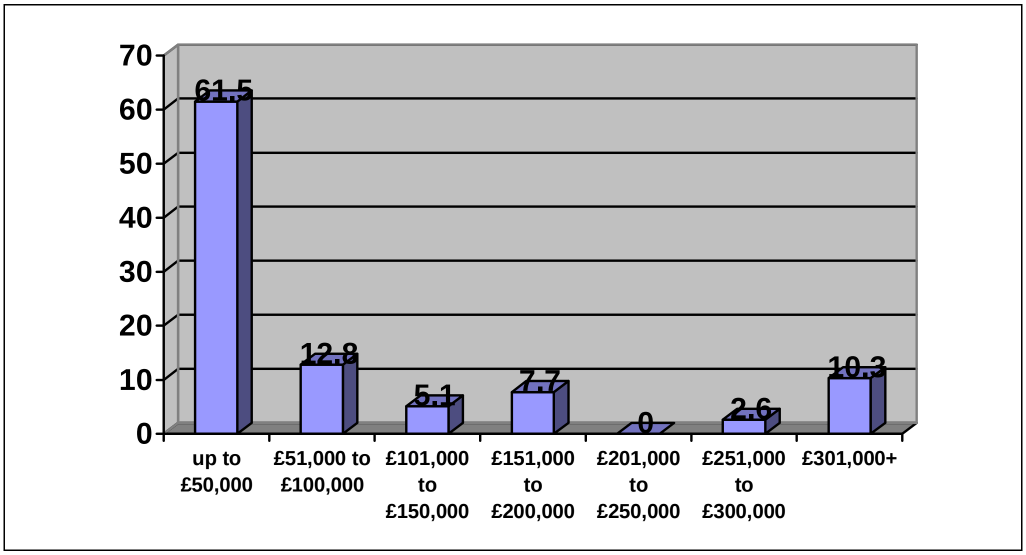
Figure 2 shows that 52% of the businesses have been operating for between 1 and 5 years and 14% operating for between 11 and15 years, 11% between 16-20 years and 9% for 21+ years and also 6 and10 years, so overall a fairly even distribution across all the categories. 66% have been operating for less than 10 years, which shows a slight decrease in new businesses, compared to the 70% in the 2008 survey results.

Figure 2 - Number of years businesses have been in operation



Most businesses within the AONB are small businesses with 84% employing between 1 and 5 full time staff and 78% between 1 and 5 part time staff. There are however a few larger businesses which employ 21+ full time and part time staff, accounting for 4% and 5% of the overall respondents.
The number of businesses that employ full time staff has not decreased since the survey was undertaken in 2008; the number of businesses that employ part time staff has increased significantly since 2008. 38 businesses reported they employ part time staff compared to 23 businesses in 2008.
Figure 2 shows annual turnover, the majority of businesses (61%) are turning over up to £50,000 per annum and 13% are turning over between £51,000 and £100,000 with little representation in the other categories apart from the higher end of the scale with 10% in excess of £300,000 per annum. These figures highlight that there are a higher percentage of smaller businesses but also larger businesses but there are not many businesses within the Bowland area that fall in to the medium business category. These trends mirror those of 2008.

Figure 3 – Annual turnover



76% state that their business is operating better this year than last year – of those 35% stated they had seen an increase of between 1 and 10% and 22% an increase of between 21% and 30%. Only 24% of respondents stated that their business was operating worse than last year, and only 11% of businesses reported a decrease in business of between -1 and -40%. Compared to the results of the 2008 survey, 21% of the businesses had reported a decrease in business since 2006, the number of businesses recording a decline in business has reduced by nearly 50% this is a vast improvement and positive finding for the businesses within the AONB.

2.3 Visitor profile (Q7, Q8, Q9, Q10, Q11, Q12, Q13, Q14, Q15)

In terms of business's opinion of visitor spend per person per visit; the highest figures occurred in the £0-£5 and the £26-£50 bracket, each with responses of 22% with the smallest percentage appearing in the £16-£25 bracket. In the 2008 survey, that highest percentage came from the largest spending bracket (£100+), this bracket is nearly 10% smaller than last year; also the largest change in the spending of the visitors is within the £51-£100 bracket, with only 10% of visitors spending this much at businesses per visit. The significant decrease in the higher spending categories is possibly due to the diverse range of businesses that responded to this year's survey and also the decrease in the number of accommodation providers that completed the survey compared to 2008, which would account for higher spend.

Figure 4 – Visitor spend

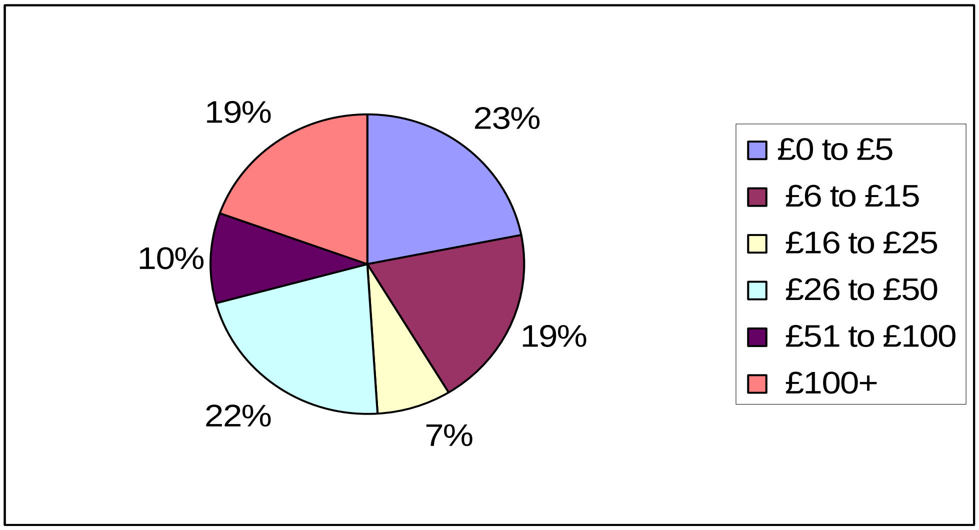
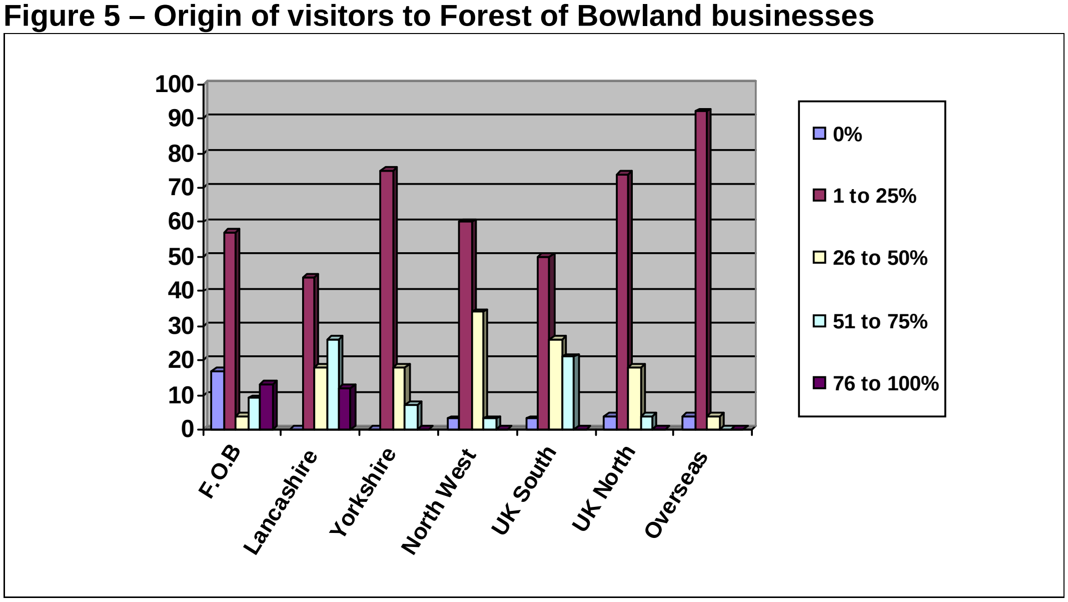


Figure 5 shows where the businesses think their visitors have come from to visit the area. 13% of businesses reported that 76-100% of their visitors came from within the Forest of Bowland, therefore a perceived increase in the number of visitors from within the AONB from 2008. However, there was also an increase of visitors from outside the area which might relate to increased marketing of the AONB through the website and leaflets and also by partners and businesses.
WIth regards to overseas visitors, there has not been much change in the percentage of visitors that come to the businesses within the Forest of Bowland. There also has not been a significant change in visitors from the South or the North from 2008, the only recordable difference is that 21% of businesses reported this year 51-75% of visitors came from the South, compared to 16% of businesses last year.

Figure 5 – Origin of visitors to Forest of Bowland businesses

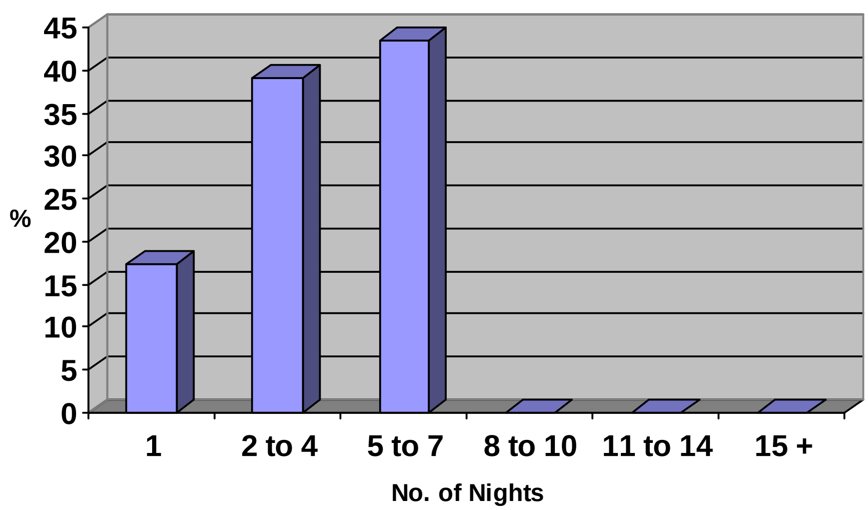


The survey asked the accommodation providers how long the majority of their visitors stay with them, there was not a major difference in the percentages from the 2008 results, only that the number of visitors staying for just one night has decreased by 5% and the number of visitors staying between 5 to 7 nights has increased by 5%. This trend also emerged in the 2009 Visitor Survey. This can only be taken as a positive change due to visitors spending more time in the area and adding to the local economy.

Accommodation providers were also asked to note what type of visitors they attract, from long stay visitors to repeat visitors. Comparing the survey results to those of 2008, there is not a significant amount of change to the types of visitors that stay at the accommodation but there was a 13% increase in high numbers of new visitors which is an encouraging percentage to the accommodation providers.

This year, there were extra categories added to the "types of visitors" question to try and gain a deeper insight in to the types of visitors. There were generally high percentages represented in the low to medium numbers of families, groups and young couples. 83% of accommodation providers recorded medium to high numbers of middle aged couples and 77% recorded the same of 65+ couples.

Figure 6 – Length of Stay



The survey asked the businesses to state the main reasons why their visitors came to the Forest of Bowland. In this question two more options were added to the answers from the 2008 survey; using trampers and for business, these were added as a reflection of the feedback from last year's enterprise and visitor surveys.

From 2008 there has not been much change to the percentages and numbers, there was a slight increase in the percentage of low numbers visiting for sight seeing and pleasure visit, and also bird watching, there was also a percentage increase in low to medium numbers of visitors here for horse riding specifically. Compared to 2008, 60% of businesses recorded no visitors to the area specifically for horse riding, and only 40% were low number, this year more than half the businesses stated significant numbers for horse riding, also an increased percentage of medium to high number of visitors for cycling. The most significant change to the percentages recorded was in regards to the "visit your business in particular" option, 58% of businesses recorded medium numbers of visitors for this reason, compared to 34% in 2008. In regards to the new reasons added, only 19% stated that none of their visitors were visiting solely for business, whilst 54% concluded none of their visitors were solely here for using trampers.

When asked about membership to various organisations, there was a decrease from the results of 2008 survey, Lancashire and Blackpool Tourist Board, Yorkshire Tourist Board, and District Tourism Association all had a decrease in memberships from the respondents to the survey, whilst still 77% were a member of the Forest of Bowland Sustainable Tourism Business Network. In order to gain a more realistic picture actual membership numbers will need to be examined rather than basing it on a sample.

An extra question was added to address any conflict between the local community and tourism in the area, and if the businesses thought there were any. 81% of the businesses stated no, they did not think there were any conflicts between the two; this is a very positive response as most businesses are either run by people within the local community or at least situated in the local communities, and conflict between the two could affect both parties.

2.4 Marketing (Q16, Q17, Q18, Q19, Q20, Q21, Q22)

Again, a significant number of businesses have been involved with various Forest of Bowland marketing initiatives, thought some of the businesses have become less involved in some areas and more involved in others compared to last year:

- 30% were involved n the village leaflets
- 23% involved in the Discovery Guide
- 21% were involved in the Birding leaflets.
- 19% involved themselves in Taste of Bowland and Bowland Festival
- 10% and less for fishing, wyresdale wheels for all and north
- Lancashire bridleway leaflets.

Out of all the businesses that were involved with any of the marketing initiatives with Forest of Bowland, 78% of them thought they were either useful or very useful to their business, which is a positive increase on the results from last year.

The businesses stated what advice and support they would like in the future from the AONB unit, the areas that were most popular were business support and advise, funding advise and marketing. The number of businesses that require the support in these areas has decreased since 2008; this is probably due to the support and advice given over the past year by the AONB.

With regards to the European Charter for Sustainable Tourism, this year 88% state they are aware it has been awarded to the AONB, a 14% increase on last year's awareness.
Also, 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 88%. This will create a stronger awareness to visitors about the AONB, and also reflects the increase in number of visitors 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 a slight reduction in the amount of businesses that have used the sense of place toolkit (46% compared to 55% in 2008), but of the 46% that have used it, 86% of them claimed it as useful or very useful, with 60% of those who haven't used it wanting to find out more.

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.

Compared to the 2008 survey, 45% of the businesses are now accredited through the Green Tourism Business Scheme (GTBS); in 2008 there were only 26%. This is a reflection of the continued support within the AONB for those undergoing GTBS accreditation. Of those that are not accredited 57% of businesses stated they would like to learn more about it

There has been a very 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.

93% of businesses have visited the Forest of Bowland website, but only 62% of those have visited since May when it was newly launched. The parts of the website that the businesses found most useful can be found in appendix 1.

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.

3 Conclusions and Recommendations

3.1 Key Findings

- Compared to 2008 the different types of businesses that responded to the survey have changed, although the majority of the businesses were still accommodation providers.
- 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 half of the respondents stated this. 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 here 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 in regards to the "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, thought 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 very 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.

3.2 Conclusions

The results from this year's survey show some positive and also some negative changes. Some of the differences may be due to a more diverse range of businesses responding to the survey. By having a wider range of businesses responding more in depth findings and recommendations can be drawn from the results.
There was a reduction in the number of businesses that had been operating for less than a year and a higher representation of businesses in the longer operating periods compared to 2008. This

shows that there are less new businesses in the area and the existing businesses are sustaining in an unstable economic climate.
Both full time and part time employment has increased in the smaller business sector from 2008; this could be due to the different businesses that have responded this year or because business is growing in the area so more staff are needed.
From the results it seems that the businesses now gain a better understanding of why their visitors come to the area compared to previous years. The increase of businesses that market themselves as being part of the AONB is a very positive change in regards to awareness for the visitors and the AONB.

3.3 Recommendations

Some of the recommendations stated in 2008 are also included below because of their ongoing importance and relevance:

- Continue to support businesses through GTBS, the Business Network and through a joined approach with other organisations such as the Lancashire and Blackpool and Yorkshire Tourist Boards.
- Continue to provide training through Sense of Place, familiarisation visits to increase understanding and awareness of the AONB and signpost businesses to other training and funding available in the region.
- Continue to provide information via the Forest of Bowland website and highlight the key messages of the AONB through sections such as Walking, Riding & Cycling, Local Produce and News and Events. Encourage signposting by the businesses and provide regular statistics about what elements of the Forest of Bowland are visited most often.
- Support businesses to increase the offer to encourage visitors to stay longer rather than for short breaks and to take advantage of the 'stay-cation' trend. Again this could be achieved in part through cluster work and also through ‘Bowland Experience Ltd’ where business network members can market themselves under certain packages and themes.
- Encourage businesses to carry out visitor surveys of their own customers to gain a better understanding of their needs and the types of activities they are engaging in during in their stay.

Appendix 1

Section 1: About your business

1. Business name:

Alden Cottage, Bashall Barn, Bleasdale Cottages, Bowland Atlantic Ltd, Bowland Bioenergy Ltd, Bowland Visitor Centre, Bridge House Farm Tea Rooms, Broadgate Farm B & B, Cobden Farm Bed and Breakfast, Cycle Adventure, Cycle Bowland, Dalesbridge, Easter Cottage, Forrest Hills, Freda M. Pilkington, Green Close Studios, Halsteads Barn B&B, Height Top Farm, Holden Clough Nursery Ltd, J.R.Gorst / Dolphinholme Goat's Cheese, Laythams Farm Cottages, Little Stubbins B&B, malkin tower farm holiday cottages, Malkin Tower Farm Holiday Cottages, Old Earth House, Peter Foley of Holden Clough Nursery, Pinfold Farm, Slaidburn Village Hall, The Ashton, the old post house hotel, THE STORK INN, To Inspire, Town End Farm B&B, uncle bobs icecream

2. What is your main business type?

Accommodation provider:		47.7%	21
Café/Restaurant:		6.8%	3
Farm:		4.5%	2
Garden centre/Nursery:		4.5%	2
Historical attraction:		2.3%	1
Outdoor activity provider:		9.1%	4
Pub:		2.3%	1
Retail:		0.0%	0
Tourism attraction:		4.5%	2
Other *(please specify)*:		18.2%	8

Arts Organisation
Business Services
Garden and speaking appts.
Holiday Homes owned by our clients
renewable biomass energy provider
veg bax scheme
Village Hall
Web Designer websites about the AONB

3. How long have you been operating?		
Less than 1 yr:	4.5%	2
1 to 5 yrs:	52.3%	23
6 to 10 yrs:	9.1%	4
11 to 15 yrs:	13.6%	6
16 to 20 yrs:	11.4%	5
21+ years:	9.1%	4

4. How many people do you employ?		
4.a. Full time		
1 to 5:	84.0%	21
6 to 10:	12.0%	3
11 to 15:	0.0%	0
16 to 20:	0.0%	0
21+:	4.0%	1
4.b. Part time		
1 to 5:	78.9%	30
6 to 10:	7.9%	3
11 to 15:	2.6%	1
16 to 20:	5.3%	2
21+:	5.3%	2

5. What is your annual turnover? (excluding VAT)		
up to £50,000:	61.5%	24
£51,000 to £100,000:	12.8%	5
£101,000 to £150,000:	5.1%	2
£151,000 to £200,000:	7.7%	3
£201,000 to £250,000:	0.0%	0
£251,000 to £300,000:	2.6%	1
£301,000 +:	10.3%	4

6. Is your business operating better this year than last year?		
Better:	76.2%	32
Worse:	23.8%	10

6.a. Percentage increase or decrease:		
+ 1 to 10%:	35.1%	13
+ 11 to 20%:	21.6%	8
+ 21 to 30%:	13.5%	5
+ 31 to 40%:	5.4%	2
+ 41 to 50%:	2.7%	1
+ 51%+:	10.8%	4
- 1 to 10%:	2.7%	1
- 11 to 20%:	2.7%	1
- 21 to 30%:	2.7%	1
- 31 to 40%:	2.7%	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:	22.0%	9
£6 to £15:	19.5%	8
£16 to £25:	7.3%	3
£26 to £50:	22.0%	9
£51 to £100:	9.8%	4
£100 +:	19.5%	8

8. Do you know your yearly visitor figures?		
Yes:	12.8%	5
Yes, as an approximation:	20.5%	8
No:	66.7%	26

8.a. 2008 figures:
1,200
130
20
20,000
2253

25,000 visitor nights
2500
30 weeks booked
489
560
800
97
£4973.50

8.b. 2009 figures to date:

12
15,000
150
18,000 visitor nights
2000+
28 weeks booked
56
600
600
690
900
967
£4155.00

9. Do you know where the majority of your visitors come from? (please estimate a percentage for each one)

9.a. Within the FOB			
0%:		17%	4
9.a.i. Within the FOB			
1 to 25%:		57%	13
9.a.ii. Within the FOB			
26 to 50%:		4%	1
9.a.iii. Within the FOB			
51 to 75%:		9%	2
9.a.iv. Within the FOB			
76 to 100%:		13%	3

9.b. Within Lancashire			
0%:		0%	0
9.b.i. Within Lancashire			
1 to 25%:		44%	15
9.b.ii. Within Lancashire			
26 to 50%:		18%	6
9.b.iii. Within Lancashire			
51 to 75%:		26%	9
9.b.iv. Within Lancashire			
76 to 100%:		12%	4
9.c. Within Yorkshire			
0%:		0%	0
9.c.i. Within Yorkshire			
1 to 25%:		75%	21
9.c.ii. Within Yorkshire			
26 to 50%:		18%	5
9.c.iii. Within Yorkshire			
51 to 75%:		7%	2
9.c.iv. Within Yorkshire			
76 to 100%:		0%	0
9.d. Elsewhere within the North West			
0%:		3%	1
9.d.i. Elsewhere within the North West			
1 to 25%:		60%	18
9.d.ii. Elsewhere within the North West			
26 to 50%:		34%	10
9.d.iii. Elsewhere within the North West			
51 to 75%:		3%	1
9.d.iv. Elsewhere within the North West			
76 to 100%:		0%	0
9.e. Elsewhere in UK (South)			
0%:		3%	1
9.e.i. Elsewhere in UK (South)			
1 to 25%:		50%	17

9.e.ii. Elsewhere in UK (South)			
26 to 50%:		26%	9
9.e.iii. Elsewhere in UK (South)			
51 to 75%:		21%	7
9.e.iv. Elsewhere in UK (South)			
76 to 100%:		0%	0
9.f. Elsewhere in UK (North)			
0%:		4%	1
9.f.i. Elsewhere in UK (North)			
1 to 25%:		74%	21
9.f.ii. Elsewhere in UK (North)			
26 to 50%:		18%	5
9.f.iii. Elsewhere in UK (North)			
51 to 75%:		4%	1
9.f.iv. Elsewhere in UK (North)			
76 to 100%:		0%	0
9.g. Overseas			
0%:		4%	1
9.g.i. Overseas			
1 to 25%:		92%	26
9.g.ii. Overseas			
26 to 50%:		4%	1
9.g.iii. Overseas			
51 to 75%:		0%	0
9.g.iv. Overseas			
76 to 100%:		0%	0

10. How long do the majority of visitors stay with you? (accommodation providers only - other businesses go to Q13)			
1 night:		17.4%	4
2 to 4 nights:		39.1%	9
5 to 7 nights:		43.5%	10
8 to 10 nights:		0.0%	0

11 to 14 nights:		0.0%	0
15 + nights:		0.0%	0

10. a. Please estimate your occupancy levels as a percentage:

22%
35%
35%
35%
40%
50%
50%
58%
60%
60%
62%
65%
70-75%

11. What is your star rating?

Awaiting grading:		0.0%	0
1:		0.0%	0
2:		4.5%	1
3:		22.7%	5
4:		63.6%	14
5:		9.1%	2

11. a. a. Do you plan to improve this?

Yes:		27.3%	6
No:		72.7%	16

11. a. i. Please give your reasons:

4 star silver awarded in May missed gold by 1%,done the recommenations suggested awaiting another vist
Always room for improvement. able to interpret visitor needs as I gain experience.
As children are welcome not an option
Because we got 5*Gold award from Visit Britain, our plan is to maintain this rating, whilst continuing to provide the best possible customer care.
Hostel star system does not appear to be applicable to our business and gives no marketing

IMPROVE STANDARDS, CUSTOMER PERCEPTION
It often seems to attract guests who have little or no idea how to look after cott. At moment guests treat the property well & leave it undamaged and tidy
maintaining 4 stars is hard enough
not possible to acheive
plans have been passed for a new conservatory/breakfast room and porch to the front of the house. this will allow for a larger hall/recption area and the current breakfast room will become a tv/quiet lounge
Refuse to put curtains in our upstairs living space which is completely remote and not overlooked!
The building does not lend itself to major changes which would be too costly with no return
to provide a better standard, and attract more customers
Unable to extend property further
We aim to consolidate and improve our grading points. We are a working farm, and the accommodation is in our farmhouse home so there is a limit to what we can do.
We do not meet the gold rating due to the size of bedrooms but we are already a silver award
We do not want to be a hotel. We pride ourselves for what we offer. A lovely environment and atmosphere, lovely room, sitting room and garden and serving fantastic local food. We thing the judging to be trying to make every place the same is somewhat boring and misses the point of B&B in somebody'e home to be a different experience to a hotel experience.

12. What type of visitor do you attract? (accommodation providers only) - (select approximate numbers for each type of visitor)

12.a. Long stay visitors			
None:		25%	5
12.a.i. Long stay visitors			
Low numbers:		50%	10
12.a.ii. Long stay visitors			
Medium numbers:		20%	4
12.a.iii. Long stay visitors			
High numbers:		5%	1
12.b. Short breaks visitors			
None:		0%	0
12.b.i. Short breaks visitors			
Low numbers:		14%	3
12.b.ii. Short breaks visitors			
Medium numbers:		43%	9
12.b.iii. Short breaks visitors			
High numbers:		43%	9

12.c. Repeat visitors			
None:		0%	0
12.c.i. Repeat visitors			
Low numbers:		16%	4
12.c.ii. Repeat visitors			
Medium numbers:		52%	13
12.c.iii. Repeat visitors			
High numbers:		32%	8
12.d. New visitors			
None:		0%	0
12.d.i. New visitors			
Low numbers:		0%	0
12.d.ii. New visitors			
Medium numbers:		56%	13
12.d.iii. New visitors			
High numbers:		44%	10
12.e. Families			
None:		21%	5
12.e.i. Families			
Low numbers:		33%	8
12.e.ii. Families			
Medium numbers:		29%	7
12.e.iii. Families			
High numbers:		17%	4
12.f. Groups			
None:		30%	6
12.f.i. Groups			
Low numbers:		40%	8
12.f.ii. Groups			
Medium numbers:		10%	2
12.f.iii. Groups			
High numbers:		20%	4
12.g. Young couples			
None:		5%	1

12.g.i. Young couples			
Low numbers:		71%	15
12.g.ii. Young couples			
Medium numbers:		10%	2
12.g.iii. Young couples			
High numbers:		14%	3
12.h. Middle-aged couples			
None:		4%	1
12.h.i. Middle-aged couples			
Low numbers:		13%	3
12.h.ii. Middle-aged couples			
Medium numbers:		44%	10
12.h.iii. Middle-aged couples			
High numbers:		39%	9
12.i. 65+ couples			
None:		6%	1
12.i.i. 65+ couples			
Low numbers:		17%	3
12.i.ii. 65+ couples			
Medium numbers:		55%	10
12.i.iii. 65+ couples			
High numbers:		22%	4

13. What are your visitor's main reasons for visiting the Forest of Bowland? (select approximate numbers for each reason for visiting)			
13.a. Visit the Forest of Bowland AONB as a destination			
None:		0%	0
13.a.i. Visit the Forest of Bowland AONB as a destination			
Low numbers:		54%	15
13.a.ii. Visit the Forest of Bowland AONB as a destination			
Medium numbers:		43%	12
13.a.iii. Visit the Forest of Bowland AONB as a destination			
High numbers:		3%	1
13.b. Bird watching			

None:		15%	4
13.b.i. Bird watching			
Low numbers:		70%	19
13.b.ii. Bird watching			
Medium numbers:		15%	4
13.b.iii. Bird watching			
High numbers:		0%	0
13.c. Cycling			
None:		7%	2
13.c.i. Cycling			
Low numbers:		52%	14
13.c.ii. Cycling			
Medium numbers:		30%	8
13.c.iii. Cycling			
High numbers:		11%	3
13.d. Horse riding			
None:		48%	14
13.d.i. Horse riding			
Low numbers:		45%	13
13.d.ii. Horse riding			
Medium numbers:		7%	2
13.d.iii. Horse riding			
High numbers:		0%	0
13.e. Walking			
None:		6%	2
13.e.i. Walking			
Low numbers:		25%	8
13.e.ii. Walking			
Medium numbers:		44%	14
13.e.iii. Walking			
High numbers:		25%	8
13.f. Using Trampers			
None:		54%	14
13.f.i. Using Trampers			

Low numbers:		42%	11
13.f.ii. Using Trampers			
Medium numbers:		4%	1
13.f.iii. Using Trampers			
High numbers:		0%	0
13.g. Fishing			
None:		33%	10
13.g.i. Fishing			
Low numbers:		53%	16
13.g.ii. Fishing			
Medium numbers:		7%	2
13.g.iii. Fishing			
High numbers:		7%	2
13.h. Visit family/friends			
None:		6%	2
13.h.i. Visit family/friends			
Low numbers:		24%	10
13.h.ii. Visit family/friends			
Medium numbers:		45%	13
13.h.iii. Visit family/friends			
High numbers:		31%	6
13.i. Pleasure visit/general sight seeing			
None:		0%	0
13.i.i. Pleasure visit/general sight seeing			
Low numbers:		24%	8
13.i.ii. Pleasure visit/general sight seeing			
Medium numbers:		45%	15
13.i.iii. Pleasure visit/general sight seeing			
High numbers:		31%	10
13.j. Visit your business in particular			
None:		3%	1
13.j.i. Visit your business in particular			
Low numbers:		24%	8
13.j.ii. Visit your business in particular			

Medium numbers:		58%	19
13.j.iii. Visit your business in particular			
High numbers:		15%	5
13.k. For Business			
None:		19%	6
13.k.i. For Business			
Low numbers:		47%	15
13.k.ii. For Business			
Medium numbers:		21%	7
13.k.iii. For Business			
High numbers:		13%	4

14. Are you a member of?			
Lancashire and Blackpool Tourist Board:		46.8%	22
Yorkshire Tourist Board:		4.2%	2
District Tourism Association:		23.4%	11
Forest of Bowland Sustainable Tourism Business Network:		76.5%	36
Other *(please specify)*:		17%	8

Farm Stay
Farm Stay Member
green tourism business scheme
GTBS
Horticultural Exhibitors Association
ICAEW
Stay on a Farm
YTB now Welcome Yorkshire

14. a. If you are a member of a District Tourism Association, please state which one:

BAY TOURISM x 2
Pendle tourism
ribble valley x 5
Ribble valley & Pendle x 2

Wyre x 3
Yorkshire Dales & Harrogate

15. Do you see any conflicts between tourism in the area and the needs of the local community?

Yes:		18.6%	8
No:		81.4%	35

15. a. Any Comments

Congestion in country lanes and parking too in these areas
Destruction of the natural environment
Only that some are opposing Centros Millers plans which would bring jobs, visitors and tourism to Lancaster. None with Forest of Bowland
Visitor parking in villages, especially Clapham and Austwick in YDNP
We are a new venture at this site to start in 2010. We aim to employ and train local people within our team, any conflict could come from stretching the local people resource
Would prefer our holiday cottage to be our main residence but unable to change planning permission at present

Section 3: Marketing

16. Have you been involved in joint marketing initiatives with the Forest of Bowland AONB?

Village leaflet:		29.7%	14
Fishing leaflet:		10.6%	5
Birding leaflet:		21.2%	10
Wyresdale Wheels for All:		6.3%	3
Taste of Bowland:		19.1%	9
Discovery Guide:		23.4%	11
Festival Bowland:		19.1%	9
North Lancs Bridleway:		6.3%	3

16.a. Or involvement with joint initiatives with other organisations e.g. LBTB/District Tourism Associations? (please state)

Bowland Arts Festival
Bridle Link in West Lancashire
Green Tourism

LBTB x 4
Picnic hamper promotion
ribble valley food trail
Ribble Valley Tourism Association
Tourism exhibitions

16.b. If you have been involved in any joint initiatives how useful have they been to your business?

Very useful:	24.1%	7
Useful:	51.7%	15
No opinion:	13.8%	4
Not useful:	10.3%	3

17. What type of future support would you like from the AONB unit?

business support and advice:	24%	27
familiarisation visits:	14%	16
funding advice:	20%	22
marketing advice:	21%	24
training:	15%	16
Other *(please specify)*:	6%	5

business networking
Everything is useful
Grant aid
Joint marketing
Sustainable Network

18. Are you aware of the European Charter for Sustainable Tourism which has been awarded to the AONB?

Yes:	87.8%	36
No:	12.2%	5

19. Do you market your business as being part of the Forest of Bowland AONB?

Yes:	88.1%	37
No:	11.9%	5

19.a. If not, why not?

AS A FRIEND OF THE FOREST DUE TO LOCATION
Don't seem to need to

20. Have you used the Forest of Bowland's Sense of Place toolkit?			
Yes:		46.5%	20
No:		53.5%	23
20.a. If yes, how useful was the information?			
Very useful:		28.6%	6
Useful:		57.1%	12
Average:		9.5%	2
Not useful:		4.8%	1
20.b. If you have not used the toolkit, would you like to find out more?			
Yes:		60.0%	9
No:		40.0%	6

21. Have you been on a Sense of Place training course?			
Yes:		48.8%	20
No:		51.2%	21
21.a. If yes, how useful was the training?			
Very useful:		27.8%	5
Useful:		61.1%	11
Average:		5.6%	1
Not useful:		5.6%	1

22. Are you aware of the Green Tourism Business Scheme?			
Yes, I am accredited:		45.2%	19
Yes, I have heard about it:		52.4%	22
No:		2.4%	1
22.a. Would you like to learn more about the Green Tourism Business Scheme?			
Yes:		57.1%	12
No:		42.9%	9

23. If you are currently a member of the Sustainable Tourism Business Network, how useful have you found this?			
Very useful:		53.3%	16

Useful:		26.7%	8
Average:		13.3%	4
Not useful:		3.3%	1
Other *(please specify)*:		3.3%	1

Only just joined

Section 4: Forest of Bowland website

24. Have you visited the Forest of Bowland website?

Yes:		93.0%	40
No (go to Q25):		7.0%	3

24. a. Have you visited the site since May when it was newly launched?

Yes:		62.5%	25
No:		37.5%	15

24. b. What are the most useful parts of the website?

Access to info on what is available in the AONB.
all of the website is extremely useful and visitors enjoy looking at it as well
Downloadable leaflets and resources
footpaths and local attractions
links
Maps and walks - would like to input more cultural services on offer in the area
Walking maps
Walking maps particularly, but everything is useful.
walking maps.
Walks in a specific area and details are Wildlife walks

24.c. Overall, how do you rate the website?

Excellent:		41.2%	14
Good:		52.9%	18
Average:		5.9%	2
Below average:		0.0%	0
Poor:		0.0%	0

24.d. Do you have any suggestions for changes or additions to the website?

More profiling of arts activities and things to do

25. Would you be interested in selling Bowland branded products in the future?

Yes:		70.0%	28
No:		30.0%	12

26. Would you be interested in packaging/marketing your business with any of the following: (tick any that apply)			
Walking:		68%	32
Cycling:		57.4%	27
Horse Riding:		34%	16
Trampers:		21.2%	10
Bird Watching:		46.8%	22
Fishing:		34%	16