Forest of Bowland AONB Business Enterprise Survey Report Summer 2008

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FOREST OF BOWLAND
Area of Outstanding Natural Beauty

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1. Enterprise Survey for the Forest of Bowland AONB

a. Aims of the enterprise survey

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.

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 pubic 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; 41 businesses responded which gives a response rate of 34%.

This is a fairly high response rate given that there was no prize incentive to complete the questionnaire. 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 were surveyed including accommodation providers, cafes/restaurants and outdoor activity providers.

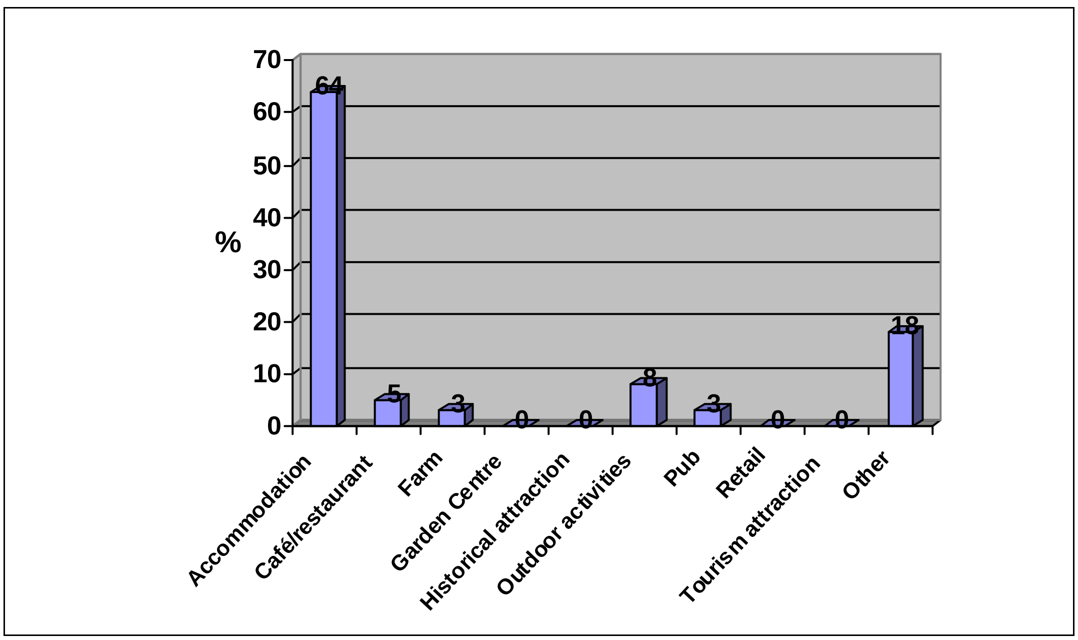
The majority of questions were designed to elicit closed responses; however there were opportunities for businesses to offer more qualitative type responses. The qualitative responses to questions 15, 17a, 22b and 22c, can be found in *Appendix 1.*

Comparisons to the data from 2004 and 2006 are made in the results section, however, the questionnaire in 2008 was redesigned to take into consideration development of projects and work undertaken by the AONB over the last 2 years, therefore some of the less relevant questions from 2004 and 2006 were omitted and comparisons are not always possible.

2.1 Response Rate (Q2)

The highest response was from accommodation providers accounting for 64% of the total with 8% for outdoor activity providers and 5% for cafes/restaurants. There was no representation from garden centres/nurseries, historical attractions or retail. 18% responded in the 'other' category which included a brewery, web designer and furniture makers. In 2006 accommodation providers represented the highest number of responses with 37% of the total, which is significantly lower than 2008. However, in 2006 there was a higher response from cafes/restaurant businesses who accounted for 31% of the responses.

Figure 1 – Survey response rate by business type

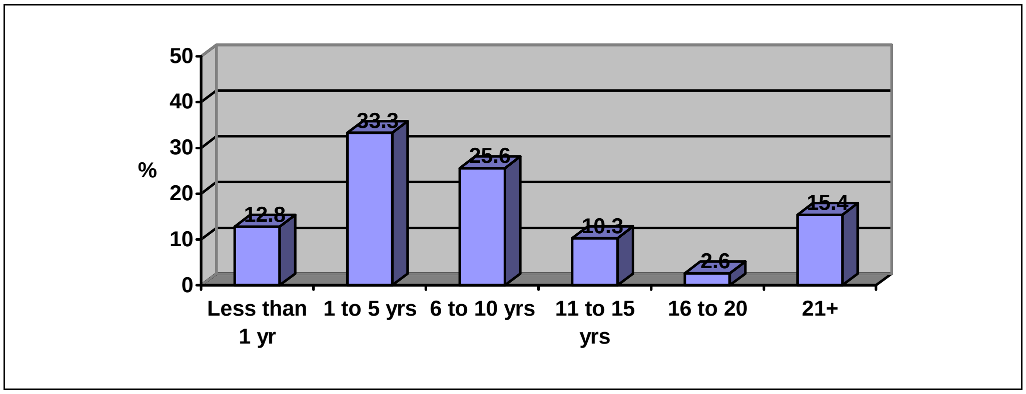


2.2 About the Business (Q3, Q4, Q5, Q6)

Figure 2 shows that 33% of the businesses have been operating for between 1 and 5 years and 26% for between 6 and 10 years with 13% accounting for less than 1 year and 15% for 21+ years, so overall a fairly even division across the categories, but with over 70% operating for less than 10 years. These percentages differ somewhat from 2006 where 'on average the majority of businesses surveyed had been operating for 17. 5

years'. The 2008 figures suggest that there has been an increase in the number of new businesses over the past two years.

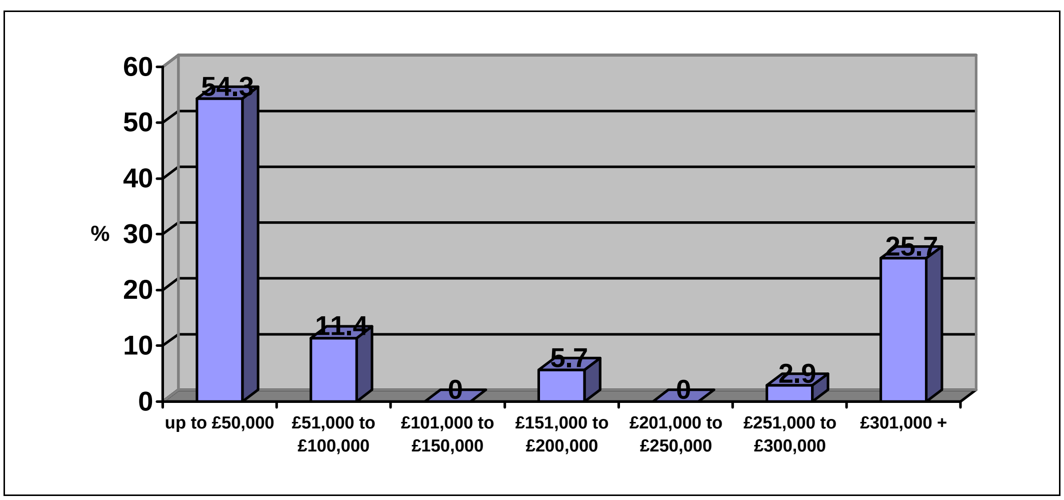
Figure 2 – Number of years businesses have been in operation



Most businesses within the AONB are small businesses with 78% employing between 1 and 5 full time staff and 74% between 1 and 5 part time staff. There are however a few larger businesses which account for 11% and 9% respectively who employ 21+ full time and part time staff. The number of full time staff employed has decreased since 2006 which showed an average of 9.4 full time staff employed in businesses across Bowland.

Figure 2 shows annual turnover, the majority of businesses (54%) are turning over up to £50,000 per annum with little representation in the other categories apart from the higher end of the scale with 26% in excess of £300,000 per annum. These figures highlight that there is a high percentage of small businesses and a fairly high percentage of large businesses but few in-between across Bowland. It is difficult to draw comparisons from 2006 as an average turnover figure was calculated which isn't comparable to the figures collated in 2008.

Figure 3 – Annual turnover

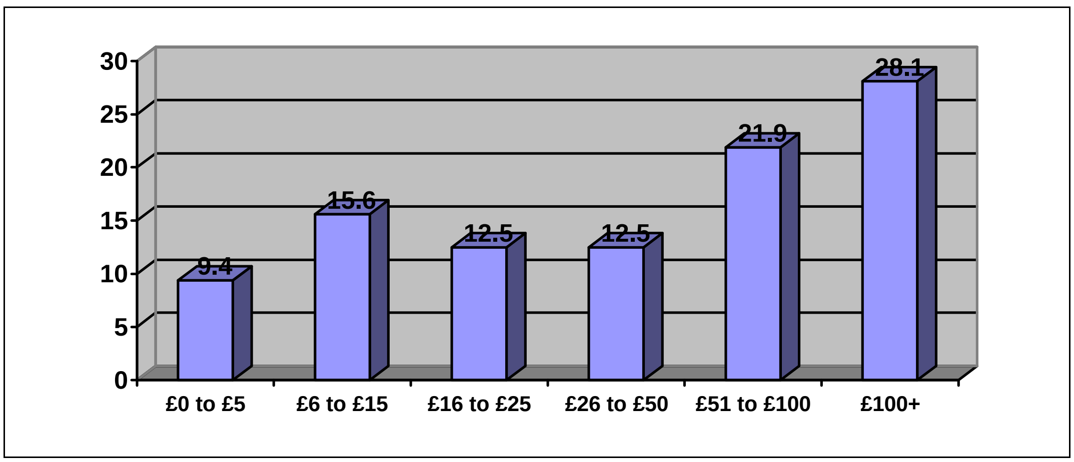


57% stated that there business was operating better this year than last year – of those 39% stated they had seen an increase of between 1 and 10% and 21% an increase of between 21 and 30%. However, 43% stated that their business was operating worse than last year, 12% had seen a decrease of between -1 and -10% and a further 9% between -21 and -40%.

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

In terms of business's opinion of visitor spend per person per visit, the highest figure occurred in the £100+ bracket at 28% while 22% spent between £51 and £100 and the smallest percentage emerged in the £0 to £5 bracket. These figures are significantly different from 2006 when 44% of visitor spend was between £5 and £15 per day, with the least number of visitors (4%) spending being between £50 and 100+. This could be partly related to the fact that there was a higher percentage response from accommodation providers in 2008 where spend will be higher than for example a tea room which had a higher representation in 2004.

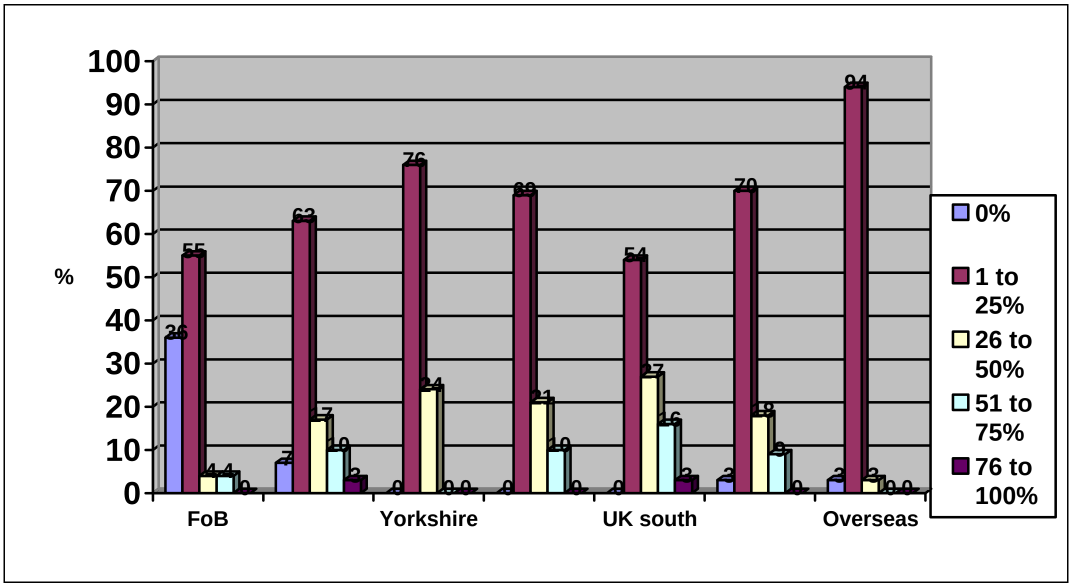
Figure 4 – Visitor spend



Only 42% of businesses knew or could make estimation as to their yearly visitor figures to date. The range of yearly visitors was vast in 2006 ranging from 15 to 100,000 and again a similar wide range emerged for 2008. It is difficult to make any comment on these figures and generating an average number does not provide any more of a meaningful insight, the only comment that can be drawn is that these figures highlight the diverse range of businesses who responded to the survey. Where numbers are quite low these may represent the smaller accommodation provider and the higher percentages may represent such businesses as tea rooms or visitor attractions.

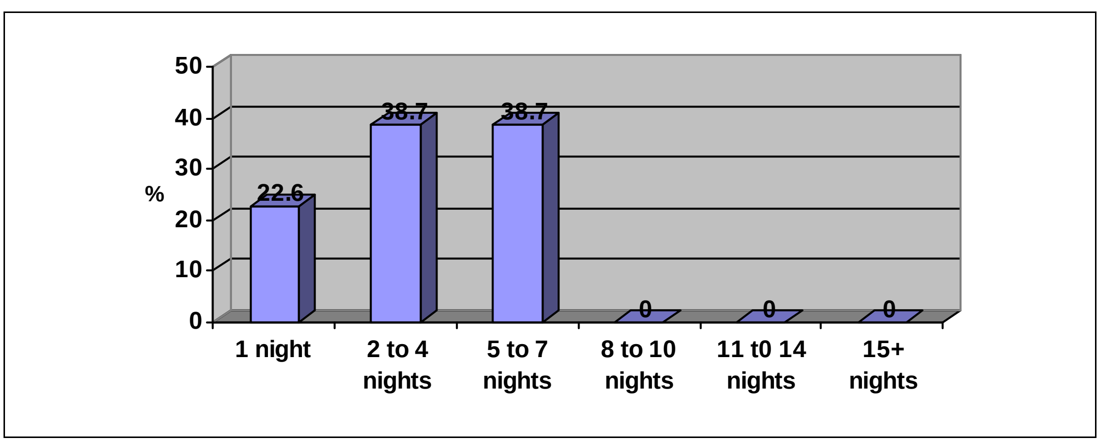
Figure 5 shows where the businesses think their visitors have come from. 91% agreed that less than 25% of their visitors were from within the Forest of Bowland, similarly 70% and 76% respectively agreed that less than 25% percentage was from within Lancashire and Yorkshire. A higher percentage, 43% agreed that between 26 and 75% of their visitors were from the south while 27% agreed that between 26 and 75% were from elsewhere in the north. 97% agreed that less than 25% of their visitors were from overseas. In 2006 the figures differed significantly, although the question again was worded slightly differently. Visitors to the Forest of Bowland in 2006 were local to Lancashire and the Northwest with 71.7% of visitors coming from these areas.

Figure 5 – Origin of visitors to Forest of Bowland businesses



For accommodation providers the majority of visitors either stayed for short breaks (2 to 4 nights) or longer (5 to 7 nights) – 39% in each category (Figure 6). Fewer visitors stayed for one night (23%) but no visitors stayed longer than 7 nights. This was also reiterated by the businesses themselves in the question that followed. The majority felt that they attracted low numbers of long stay visitors and a medium to high number of short breaks visitors. The majority stated that they attracted medium to high numbers of repeat and new visitors.

Figure 6 – Length of Stay



In relation to the types of activities visitors were engaging in whilst at the business, a low number felt that visitors came for bird watching, a low to medium number for cycling, a low number if none at all for horse riding, none to low numbers for fishing and medium numbers to visit family and friends. However, walking was evenly spread over the 3 categories of low, medium and high with no overall consensus – this could be related to the diverse types of businesses who responded and the different types of visitor they may attract or perhaps a lack of knowledge as to what visitors were doing whilst visiting the area and their business. The categories that showed the highest percentages and reasons for people visiting were for a pleasure visit and general sight seeing and for visiting their own business in particular. Businesses felt that low to medium numbers visited the Forest of Bowland specifically as a destination; however, when compared to the results of the 2008 Visitor Survey, a high percentage of visitors actually stated they were visiting Bowland specifically as a 'destination'.

When asked about membership to various organisations, 39% stated they were a member of Lancashire and Blackpool Tourist Board, and 20% of Yorkshire Tourist Board. 29% were a member of a District Tourism Association and 46% were a member of the Forest of Bowland Sustainable Tourism Business Network.

2.4 Marketing (Q14, Q15, Q16, Q17, Q18, Q19, Q20, Q21, Q22)

A significant number of businesses have been involved with various Forest of Bowland marketing initiatives:

- 29% involved with village leaflets and the Bowland Festival
- 24% a Taste of Bowland
- 21 % the Discovery Guide
- Less than 20% for fishing, birding, wyresdale wheels for all and north lancs bridleway leaflets.

Of those involved 65% felt these joint marketing initiatives were useful, 9% very useful but also 17% felt they were not useful.

The majority of businesses felt that support from the AONB unit in the form of business support and advice, familiarisation visits, funding advice, marketing advice and training were of high importance in the future. However, slightly higher percentages emerged for business support and advice and marketing. This is similar to 2006 when 53% of businesses wanted to see more marketing support from the AONB.

74% were aware that the European Charter for Sustainable Tourism had been awarded to the AONB, a slight increase from 2006 where 72% of businesses were aware of the European Charter.

A significant number (85%) market themselves as being part of the Forest of Bowland AONB.

55% have used the Sense of Place toolkit (52% in 2006) and 71% found it either useful or very useful with 10% stating it wasn't useful. Of those who hadn't used the toolkit, 67% wanted to learn more about it, so there is scope for further awareness-raising. Similarly, 26% had attended the Sense of Place training and of those 80% found it either useful or very useful.

26% of businesses have GTBS accreditation, 51% have heard about it and 23% hadn't and of those 65% stated they would like to find out more about the scheme, therefore there is further scope to increase awareness and develop understanding about GTBS. 72% of businesses felt that being part of the Bowland Business Network is either useful or very useful with only 6% stating it was not useful.

74% of businesses have visited the Forest of Bowland website of which 87% found it either useful or very useful. In 2006, the number of businesses visiting the site was 45%, so this shows a marked increase in use and coincides with developments and marketing of the website to businesses and partners over the last 12 months.

17% of businesses are currently involved in the Bowland Tourism Environment Fund (BTEF) scheme with a further 52% interested in becoming involved.

3 Conclusions and Recommendations

3.1 Key Findings

- Since 2006 there has been a significant increase in the number of new businesses. 13% of businesses are less than a year old.
- Small businesses predominate with 78% employing between 1 and 5 full time staff and just over half of them with a turnover of less than £50,000 per annum. However, there are also 26% with turnover in excess of £300,000 – this percentage will include businesses such as the larger caravan parks, hotels and visitor attractions, although there are few in the Forest of Bowland they do exist.
- Over half of the businesses felt their business was operating better than last year, with 60% of businesses stating an increase of up to 30%. However, 12% saw a decrease of between -1 and -10% and a further 9% saw a decrease of between -21 and -40%.
- Daily visitor spend had increased significantly from 2006, with 28% spending £100+ and 22%, between £51 and £100. In 2006 only 4% of visitors were spending in excess of £50, with the majority spending between £5 and £15 per day.
- There are a higher number of visitors from out of the area in 2008 than 2006. In 2006 visitors from the region (Lancashire and the North West) predominated while in 2008 visitor percentages from elsewhere in the south and north of the UK were more highly represented.
- In terms of accommodation, the majority of visitors are staying for short breaks or for no longer than 7 nights. However, there are a high number of repeat but also new visitors.
- Businesses feel that the main types of activities visitors are engaging in whilst visiting the Forest of Bowland are walking or pleasure visits/general site seeing or to visit their business in particular.
- Overall, there seemed a general lack of understanding from the businesses as to why their visitors had chosen the Forest of Bowland and what activities they were engaging in during in their visit.
- About 1/3rd of the businesses were a member of one or other of the various tourism organisations.

- A significant number of businesses have been involved with the various joint marketing initiatives carried out by the AONB with a high percentage finding them either useful or very useful.
- In terms of future support from the AONB team businesses felt all areas are important but most significantly general business support and advice and marketing are stated as most important.
- There is a strong awareness that the European Charter for Sustainable Tourism has been awarded to the Forest of Bowland AONB.
- A high percentage of businesses – 85% market themselves as being part of the Forest of Bowland AONB.
- Over half of the businesses have used the Sense of Place toolkit and 26% had attended the training day. The majority have found these useful.
- A quarter of the businesses have GTBS accreditation while 65% would like to find out more.
- Three quarters of the businesses have visited the Forest of Bowland website and the majority found it useful. There has been a significant increase in businesses visiting the site since 2006.
- There are 17% currently involved with BTEF but a further 52% would like to learn more.

3.2 Conclusions

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 3 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.

3.3 Recommendations

- 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.
- Continue to support the start-up of new businesses especially those that are wanting to adopt a sustainable approach.
- Encourage further businesses to adopt a joined approach to working to encourage visitors to stay longer by developing the 'visitor offer', through such initiatives as cluster groups for bird watching, horse riding and cycling.
- Currently, businesses highlight low levels of engagement in activities such as horse riding, bird watching, fishing and cycling. There could be increased awareness raising and training to signpost businesses towards relevant information and initiatives to promote such activities to visitors.
- There is scope to further promote the BTEF schemes and Sense of Place training.
- Support businesses to increase the offer to encourage visitors to stay longer rather than for short breaks, again this could be achieved in part through cluster work or developing the 'Bowland Experience' as a Community Interest Company where businesses 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 – Questionnaire and Results

Section 1: About your business

1. "'Business name:'"

Hunter's Rest, 4 The croft Caton, Arbutus Guest House Clapham, Barrie Tyrer web design, Bleasdale Cottages, Broadgate Farm B & B & Caravan Club 5 van Cl Site, Clough Bottom Cottages, Cobble Hey Farm & Gardens, Cobden Farm Bed and Breakfast, Copynook Hotel, Crowtrees Park, Cycle Adventure, Dam Head Barn Roughlee, Easter cottage, Forrest Hills, Gibbon Bridge Hotel, Greenbank Farmhouse B&B, Halsteads Barn B&B, Judd Holmes Barn, Little Stubbins B&B, Malkin Tower Farm Holiday Cottages, Mansergh Cottages, Off the Rails, Parkfoot Holiday Homes Ltd, Penny Productions, The Austwick Traddock, The Garden Cottage, The Inn at Whitewell, The Old Stable, The White Bull Hotel, Tipperthwaite Barn B & B.

2. "'What is your main business type?'"

Accommodation provider:		64.1%	25
Café/Restaurant:		5.1%	2
Farm:		2.6%	1
Garden centre/Nursery:		0.0%	0
Historical attraction:		0.0%	0
Outdoor activity provider:		7.7%	3
Pub:		2.6%	1
Retail:		0.0%	0
Tourism attraction:		0.0%	0
Other *(please specify)*:		17.9%	7

- Brewery with visitor centre/shop
- Caravan Park
- Caravan Park with pub & restaurant
- Maker of bespoke furniture toys, games and gifts to sell to tourists.
- Maker of furniture boxes and games, souvenirs to buy from the local area
- Web design
- Working farm with gardens and tearoom

3. "'How long have you been operating? '"

Less than 1 yr:		12.8%	5
1 to 5 yrs:		33.3%	13
6 to 10 yrs:		25.6%	10

11 to 15 yrs:	10.3%	4
16 to 20 yrs:	2.6%	1
21+ years:	15.4%	6

4. '"How many people do you employ?"'

4.a. Full time

1 to 5:	77.8%	21
6 to 10:	11.1%	3
11 to 15:	0.0%	0
16 to 20:	0.0%	0
21+:	11.1%	3

4.b. Part time

1 to 5:	73.9%	17
6 to 10:	13.0%	3
11 to 15:	4.3%	1
16 to 20:	0.0%	0
21+:	8.7%	2

5. '"What is your annual turnover?"' (excluding VAT)

up to £50,000:	54.3%	19
£51,000 to £100,000:	11.4%	4
£101,000 to £150,000:	0.0%	0
£151,000 to £200,000:	5.7%	2
£201,000 to £250,000:	0.0%	0
£251,000 to £300,000:	2.9%	1
£301,000 +:	25.7%	9

6. '"Is your business operating better this year than last year?"'

Better:	57.1%	20
Worse:	42.9%	15

6.a. '"Percentage increase or decrease:"'

+ 1 to 10%:	39.4%	13
+ 11 to 20%:	21.2%	7
+ 21 to 30%:	6.1%	2
+ 31 to 40%:	3.0%	1
+ 41 to 50%:	3.0%	1
+ 51%+:	6.1%	2
- 1 to 10%:	12.1%	4

- 11 to 20%:	0.0%	0
- 21 to 30%:	3.0%	1
- 31 to 40%:	6.1%	2
- 41 to 50%:	0.0%	0
- 51%+:	0.0%	0

3.3.1.1 Section 2: Visitor profile

7. "'How much do your visitors spend (per person) at your business (on average) per visit?'"

£0 to £5:	9.4%	3
£6 to £15:	15.6%	5
£16 to £25:	12.5%	4
£26 to £50:	12.5%	4
£51 to £100:	21.9%	7
£100 +:	28.1%	9

8. "'Do you know your yearly visitor figures?'"

Yes:	12.1%	4
Yes, as an approximation:	30.3%	10
No:	57.6%	19

8.a. "'2007 figures:'"

100,000
15
1500
1900
24,000 visitor nights (not stays)
240 bed nights
25 plus
30 weeks booked
40 sets of visitors
4500
52
8000

8.b. "'2008 figures to date:'"

12 sets of visitors

2400
25
2500
40weeks booked
7
800
84 bed nights but closed 28 bed nights for weddings

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%:		36.3%	8
9.a.i. Within the FOB			
1 to 25%:		54.5%	12
9.a.ii. Within the FOB			
26 to 50%:		4.5%	1
9.a.iii. Within the FOB			
51 to 75%:		4.5%	1
9.a.iv. Within the FOB			
76 to 100%:		0%	0
9.b. Within Lancashire			
0%:		6.6%	2
9.b.i. Within Lancashire			
1 to 25%:		63.3%	19
9.b.ii. Within Lancashire			
26 to 50%:		16.6%	5
9.b.iii. Within Lancashire			
51 to 75%:		10.0%	3
9.b.iv. Within Lancashire			
76 to 100%:		3.3%	1
9.c. Within Yorkshire			
0%:		0%	0
9.c.i. Within Yorkshire			
1 to 25%:		76.0%	19
9.c.ii. Within Yorkshire			
26 to 50%:		24.0%	6
9.c.iii. Within Yorkshire			
51 to 75%:		0%	0

9.c.iv. Within Yorkshire			
76 to 100%:		0%	0
9.d. Elsewhere within the North West			
0%:		0%	0
9.d.i. Elsewhere within the North West			
1 to 25%:		68.9%	20
9.d.ii. Elsewhere within the North West			
26 to 50%:		20.6%	6
9.d.iii. Elsewhere within the North West			
51 to 75%:		10.4%	3
9.d.iv. Elsewhere within the North West			
76 to 100%:		0%	0
9.e. Elsewhere in UK (South)			
0%:		0%	0
9.e.i. Elsewhere in UK (South)			
1 to 25%:		54.1%	20
9.e.ii. Elsewhere in UK (South)			
26 to 50%:		27.0%	10
9.e.iii. Elsewhere in UK (South)			
51 to 75%:		16.2%	6
9.e.iv. Elsewhere in UK (South)			
76 to 100%:		2.7%	1
9.f. Elsewhere in UK (North)			
0%:		3.1%	1
9.f.i. Elsewhere in UK (North)			
1 to 25%:		69.6%	23
9.f.ii. Elsewhere in UK (North)			
26 to 50%:		18.2%	6
9.f.iii. Elsewhere in UK (North)			
51 to 75%:		9.1%	3
9.f.iv. Elsewhere in UK (North)			
76 to 100%:		0%	0
9.g. Overseas			
0%:		3.4%	1
9.g.i. Overseas			
1 to 25%:		93.2%	27
9.g.ii. Overseas			
26 to 50%:		3.4%	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 Q12)'"			
1 night:		22.6%	7
2 to 4 nights:		38.7%	12
5 to 7 nights:		38.7%	12
8 to 10 nights:		0.0%	0
11 to 14 nights:		0.0%	0
15 + nights:		0.0%	0

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:		24.0%	6
11.a.i. Long stay visitors			
Low numbers:		60.0%	15
11.a.ii. Long stay visitors			
Medium numbers:		12.0%	3
11.a.iii. Long stay visitors			
High numbers:		4.0%	1
11.b. Short breaks visitors			
None:		3.2%	1
11.b.i. Short breaks visitors			
Low numbers:		22.5%	7
11.b.ii. Short breaks visitors			
Medium numbers:		38.8%	12
11.b.iii. Short breaks visitors			
High numbers:		35.5%	11
11.c. Repeat visitors			
None:		0%	0
11.c.i. Repeat visitors			
Low numbers:		16.6%	5
11.c.ii. Repeat visitors			
Medium numbers:		50%	15
11.c.iii. Repeat visitors			

High numbers:		33.4%	10
11.d. New visitors			
None:		0%	0
11.d.i. New visitors			
Low numbers:		12.5%	4
11.d.ii. New visitors			
Medium numbers:		56.2%	18
11.d.iii. New visitors			
High numbers:		31.3%	10

12. "'What are your visitor's main reasons for visiting the Forest of Bowland?'" (select approximate numbers for each reason for visiting)			
12.a. Bird watching			
None:		25.0%	7
12.a.i. Bird watching			
Low numbers:		53.5%	15
12.a.ii. Bird watching			
Medium numbers:		21.5%	6
12.a.iii. Bird watching			
High numbers:		0%	0
12.b. Cycling			
None:		13.8%	4
12.b.i. Cycling			
Low numbers:		51.7%	15
12.b.ii. Cycling			
Medium numbers:		24.1%	7
12.b.iii. Cycling			
High numbers:		10.4%	3
12.c. Horse riding			
None:		60.8%	14
12.c.i. Horse riding			
Low numbers:		39.2%	9
12.c.ii. Horse riding			
Medium numbers:		0%	0
12.c.iii. Horse riding			
High numbers:		0%	0
12.d. Walking			
None:		0%	0

12.d.i. Walking			
Low numbers:		32.4%	11
12.d.ii. Walking			
Medium numbers:		38.2%	13
12.d.iii. Walking			
High numbers:		29.4%	10
12.e. Fishing			
None:		30.7%	8
12.e.i. Fishing			
Low numbers:		50.0%	13
12.e.ii. Fishing			
Medium numbers:		19.3%	5
12.e.iii. Fishing			
High numbers:		0%	0
12.f. Visit family/friends			
None:		5.8%	2
12.f.i. Visit family/friends			
Low numbers:		35.3%	12
12.f.ii. Visit family/friends			
Medium numbers:		41.2%	14
12.f.iii. Visit family/friends			
High numbers:		17.7%	6
12.g. Pleasure visit/general sight seeing			
None:		0%	0
12.g.i. Pleasure visit/general sight seeing			
Low numbers:		15.2%	5
12.g.ii. Pleasure visit/general sight seeing			
Medium numbers:		51.5%	17
12.g.iii. Pleasure visit/general sight seeing			
High numbers:		33.3%	11
12.h. Visit your business in particular			
None:		6.6%	2
12.h.i. Visit your business in particular			
Low numbers:		26.7%	8
12.h.ii. Visit your business in particular			
Medium numbers:		33.7%	11
12.h.iii. Visit your business in particular			
High numbers:		30.0%	9

12.i. Visit the Forest of Bowland AONB as a destination		
None:	6.1%	2
12.i.i. Visit the Forest of Bowland AONB as a destination		
Low numbers:	51.5%	17
12.i.ii. Visit the Forest of Bowland AONB as a destination		
Medium numbers:	36.3%	12
12.i.iii. Visit the Forest of Bowland AONB as a destination		
High numbers:	6.1%	2

13. "'Are you a member of?'"		
Lancashire and Blackpool Tourist Board:	39.0%	16
Yorkshire Tourist Board:	19.5%	8
District Tourism Association:	29.2%	12
Forest of Bowland Sustainable Tourism Business Network:	46.3%	19
Other *(please specify)*:	12.1%	5

North West Tourist Board, Farm Stay UK
Settle Accommodation Forum
Visit Britain
We were members of YTB till they threw us out

13.a. "'If you are a member of a District Tourism Association, please state which one:'"
Bentham
Clitheroe
Harrogate & Dales
Ingleton
Ribble Valley x 7
Wyre x 2
Wyre
Yorkshire & Harrogate Tourism Partnership x 2

Section 3: Marketing

14. "'Have you been involved in joint marketing initiatives with the Forest of Bowland AONB?'"		
Village leaflet:	n/a	12
Fishing leaflet:	29.2%	6

Birding leaflet:	19.5%	8
Wyresdale Wheels for All:	7.3%	3
Taste of Bowland:	24.3%	10
Discovery Guide:	21.9%	9
Bowland Festival:	29.2%	12
North Lancs Bridleway:	2.4%	1

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

Bentham
LBTB x 6
Ribble Valley Tourism Assn/Marketing workshop
Visit Britain
Yes - Clitheroe TA

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

Very useful:	8.7%	2
Useful:	65.2%	15
No opinion:	8.7%	2
Not useful:	17.4%	4

15. "'What type of future support would you like from the AONB unit?'"

business support and advice:	46.3%	19
familiarisation visits:	17.1%	7
funding advice:	24.3%	10
marketing advice:	39.0%	16
training:	26.8%	11
Other *(please specify)*:	12.1%	5

Act on our behalf with LCC and LBTB and Ribble Valley Council
GOOD accessibility info in the AONB
I feel very much out on a limb here, as I don't seem to belong anywhere
Network Discussion Groups with Case Studies
Promoting sustainable tourism in press and other media

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

Yes:	74.4%	29
No:	25.6%	10

17. "'Do you market your business as being part of the Forest of Bowland AONB?'"		
Yes:	85.0%	34
No:	15.0%	6

17.a. "'If not, why not?'"

Do not know how to
In Pendle. but display 50% of leaflets from Bowland
More Dales orientated
Not relevant
Not yet customers won't be familiar with AONB yet
We feel it's too far out

18. "'Have you used the Forest of Bowland's Sense of Place toolkit?'"		
Yes:	55.0%	22
No:	45.0%	18
18.a. "'If yes, how useful was the information?'"		
Very useful:	19.0%	4
Useful:	52.4%	11
Average:	19.0%	4
Not useful:	9.5%	2
18.b. "'If you have not used the toolkit, would you like to find out more?'"		
Yes:	66.7%	10
No:	33.3%	5

19. "'Have you been on a Sense of Place training course?'"		
Yes:	25.6%	10
No:	74.4%	29
19.a. "'If yes, how useful was the training?'"		
Very useful:	30.0%	3
Useful:	50.0%	5
Average:	20.0%	2
Not useful:	0.0%	0

20. "'Are you aware of the Green Tourism Business Scheme?'"		
Yes, I am accredited:	25.6%	10
Yes, I have heard about it:	51.3%	20
No:	23.1%	9

20.a. "'Would you like to learn more about the Green Tourism Business Scheme?"'		
Yes:	65.4%	17
No:	34.6%	9

21. "'If you are currently a member of the Sustainable Tourism Business Network, how useful have you found this?"'		
Very useful:	38.9%	7
Useful:	33.3%	6
Average:	11.1%	2
Not useful:	5.6%	1
Other *(please specify)*:	11.1%	2

I didn't pass

Useful : Mike Pugh is great and keeps me informed I just need to know the next step for green tourism

21.a. "'If you are not currently a member and would like to find out more, please provide your contact name and tel number:"'

Section 4: Forest of Bowland website

22. "'Have you visited the Forest of Bowland website?"'		
Yes:	73.7%	28
No (go to Q23):	26.3%	10

22.a. "'If yes, how useful is the information?"'		
Very useful:	30.0%	9
Useful:	56.7%	17
Average:	10.0%	3
Not useful:	3.3%	1

22.b. "'Which parts of the website have you found most useful?"'

- accessibility stuff
- Activities that are on going
- all business get should get same amount of coverage not just business that have had BIG GRANTS!
- all of the website is useful and interesting to me as a new provider x 2
- Business updates + events
- It is all good and useful
- It's all very good but as I say I'm a bit out on a limb and don’t know what to do about it
- news and events
- PDF leaflets
- Sustainable Tourism Network
- The walks and being able to print them for visitor use x 5

22.c. "'Is there any other information you would you like to see on the website? '"
more accessibility stuff!
more maps of walking
More PDF leaflets, events especially the festival events as a RSS feed
More walks
Really good accessibility info which I can use to sell to guests
very little on cafes and tearooms
Well my place is on the periphery, I can walk to Beacon Fell from here but I don't seem to be able to have a search area.