



FOREST OF BOWLAND

Area of Outstanding Natural Beauty

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December 2012

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Visitor Survey for the Forest of Bowland AONB

Aims of the visitor survey

To carry out a survey of visitors, as part of ongoing monitoring of tourism in the Forest of Bowland AONB.

Background

A visitor and business 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. Both surveys with relevant updates were repeated in summer 2006 and 2008, 2009 and again in summer 2011 to assist in the preparation of the Forest of Bowland sustainable tourism strategy 2010-2015. The sustainable tourism strategy for 2010-2015 <http://www.forestofbowland.com/files/uploads/pdfs/strategies/FOBSTStrategyActionPlanRT.pdf> (Action 7.1) recommends that the visitor survey is repeated biennially in order to better understand our target markets and their needs.

Increasing opportunities for sustainable enjoyment of the Forest of Bowland 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 18.3b) http://www.forestofbowland.com/man_plan_full?&flagged=All specifically 'To Undertake a biennial qualitative visitor surveys at key sites; monitor and evaluate specific issues and behaviour patterns, where necessary'.

The surveys will assist in informing future project work and developments for sustainable tourism activity in the AONB. The Forest of Bowland AONB during 2012 has continued their commitment to supporting and developing sustainable tourism. The visitor survey was carried out in November and December 2012 with a new, shorter format. However, the business enterprise survey was not conducted in 2012, instead a piece of research was undertaken via tourism business interviews by QA research consultancy to assess the economic impact of tourism.

At the beginning of 2011 The Forest of Bowland AONB was re-awarded the European Charter for Sustainable Tourism in Protected Areas, first awarded in 2005. Additionally, the AONB was runner-up in the best sustainable tourism destination category in the Virgin Responsible Tourism awards in October 2011.

Methodology

The following methods were used in achieving the above aim:

A survey was devised (*Appendix 1*) which was administered face to face with 79 visitors in allocated sites across the Forest of Bowland AONB including Beacon Fell, Slaidburn, Dunsop Bridge, Barley, Crook O' Lune and Gisburn Forest.

Survey Results

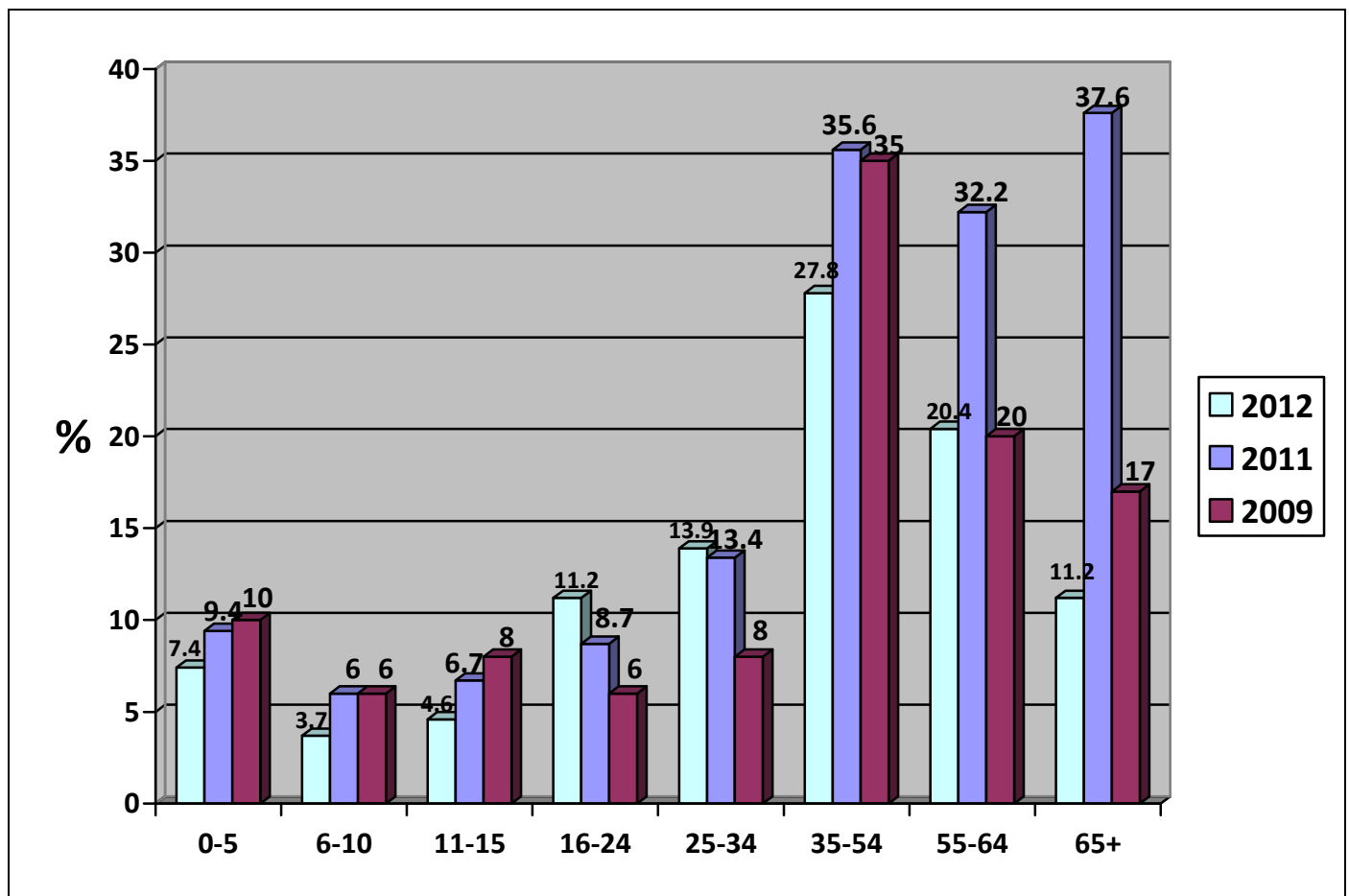
Appendix I shows the questions and results from the survey, a total of 79 visitors responded to the survey. A response of 197 was gained in 2008, 123 in 2009 and 149 in 2011.

The majority of questions were designed to elicit closed responses; however there were opportunities for visitors to offer more qualitative type responses. The qualitative responses can also be viewed in Appendix I, Q8, 9b, 10, 12, 13 & 14.

Comparisons to the data from previous years are made in the report; however the questionnaire in 2012 was redesigned to take into consideration development of projects and work undertaken by the AONB over the last few years, so comparisons are not always possible. The questionnaire was also shortened considerably and included more targeted questions.

Visitor Profile

Figure 1: Response by age

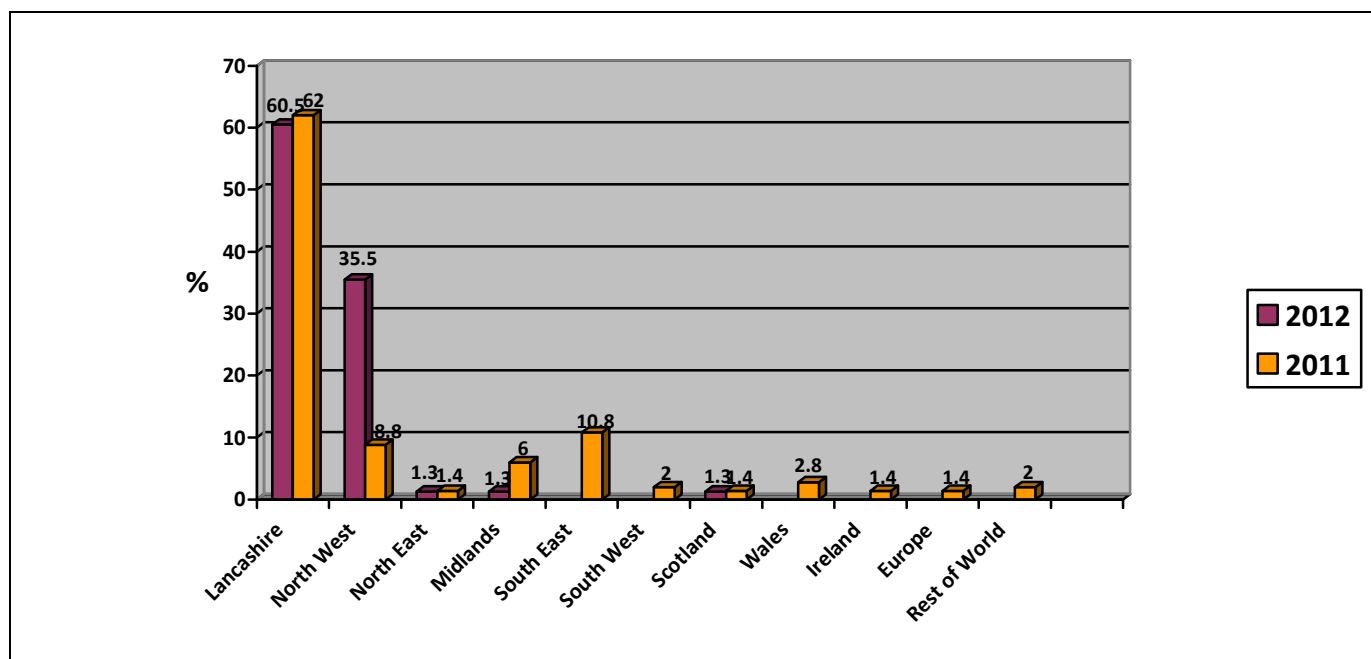


The highest percentage of responses were in 35-54 category (28%). This pattern is different from previous years. In 2011 the highest percentage of responses were in 65+ category (38%) which in turn had increased dramatically from 17% in 2009.

Similar patterns emerge across all years for representation in the younger age categories. The higher rate in the 35-54 category could be attributed to the high number of responses received at Gisburn Forest and mountain bikers.

For 2009-2012 a general pattern highlights that the majority of responses were from visitors in the 35+ age categories, with fewer visitors in the younger age groups.

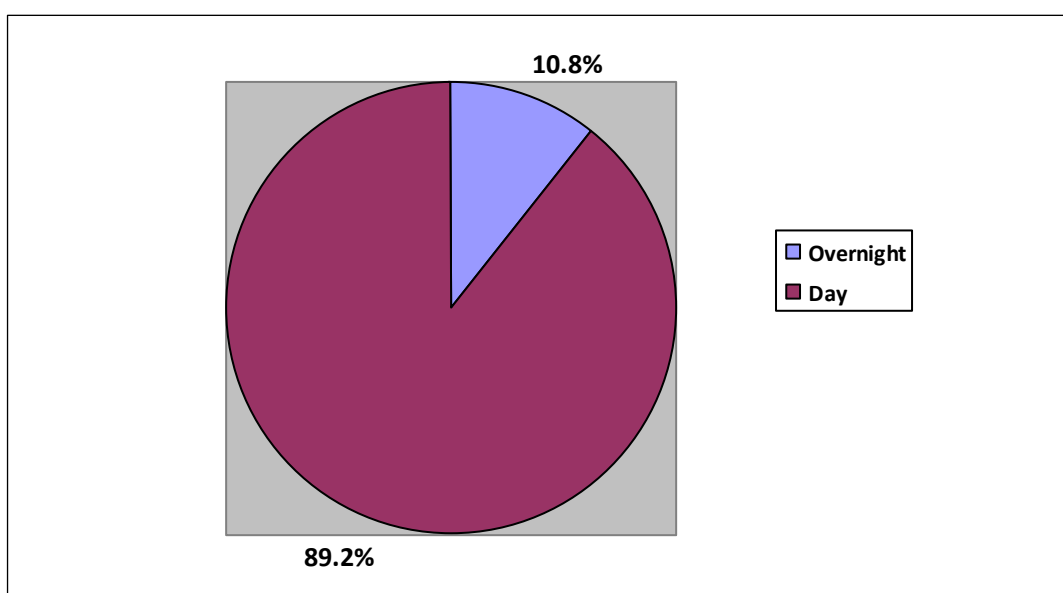
Figure 2: Where visitors have come from



As in 2011, the majority of respondents are from Lancashire (60%) and 35% in the North West. For 2012, unlike 2011 there were low percentages of visitors from the rest of the UK. This could be attributed to the fact that the 2012 survey was conducted out of season therefore the majority of respondents are local or day visitors.

A full list of individual places can be seen in Appendix I, for the purposes of analysis the places were grouped into regions.

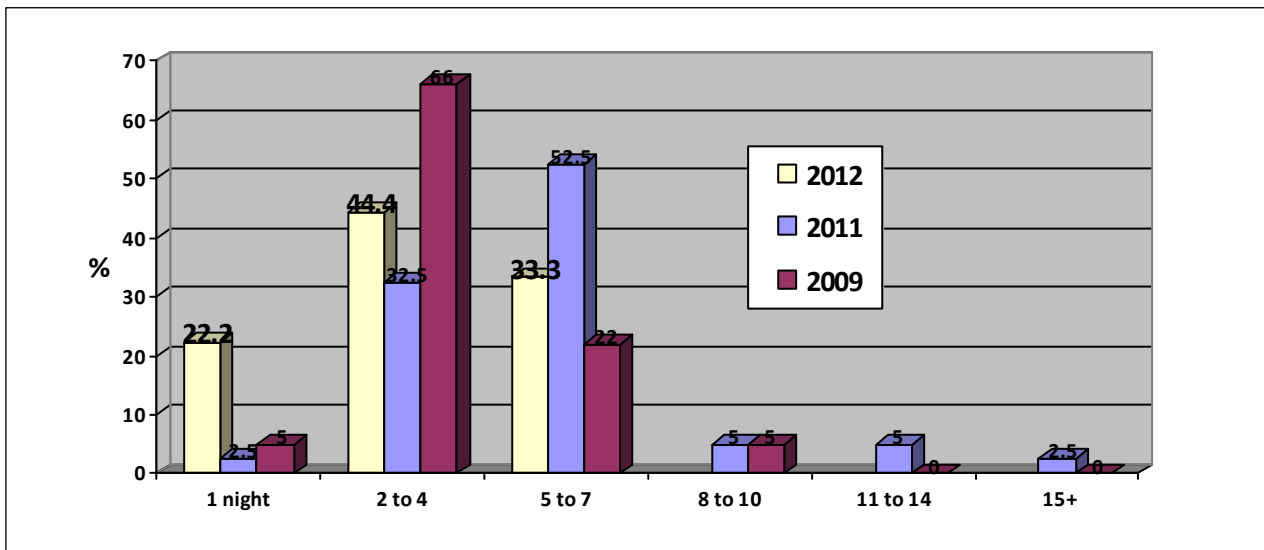
Figure 3: Type of visitor



In comparison with the 2011 results, the amount of overnight visitors has declined from 29% in 2011 to 11% in 2012. Likewise this could be attributed to the survey being conducted out of season. However, this follows the general pattern that the majority of visitors to Bowland are day visitors.

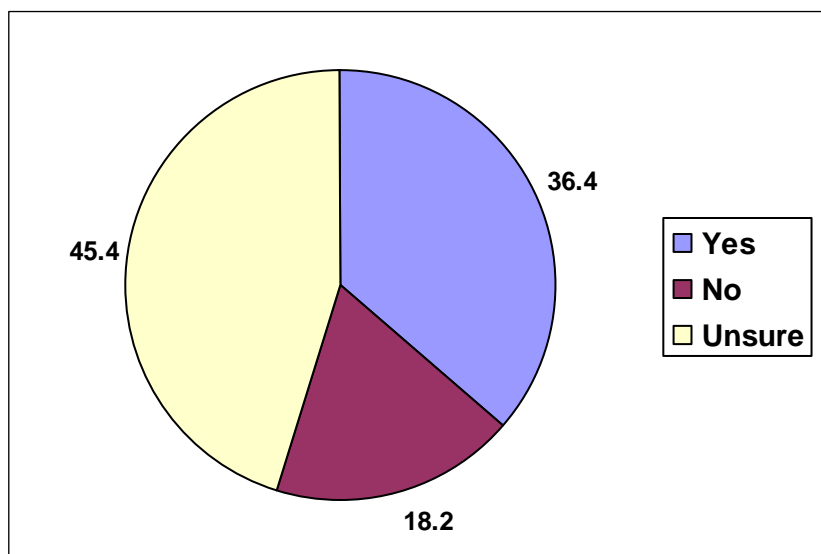
In 2012, of the 11% who were overnight visitors - as in previous years - the majority were short break visitors. The highest response was in the 2-4 night category followed by 5-7 nights and then 1 night. There is no representation for any stays longer than 7 nights.

Figure 4: Length of stay



In 2011 there was a small increase in people staying for longer periods of time (11 to 14/ 15+). However this decreased in 2012. No conclusion can be drawn as each survey is drawing from different and small samples.

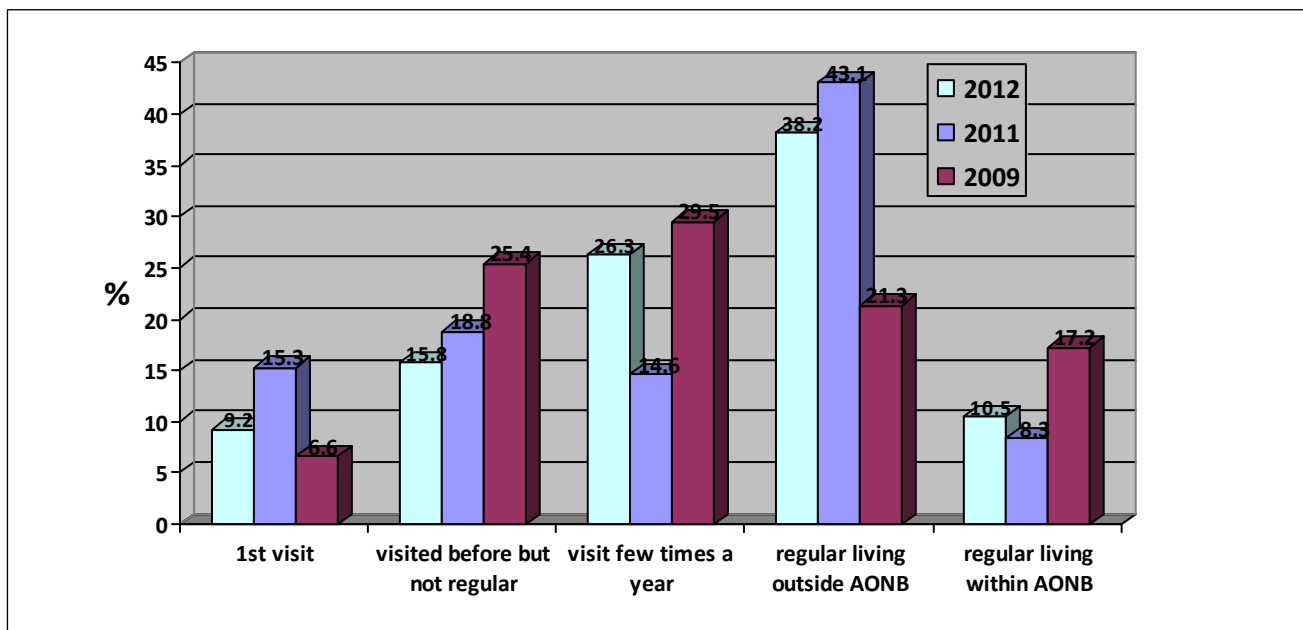
Figure 5: Interest in package holidays



This question was new for 2012 and of the 14% that responded to this question 36% stated that they would be interested in packaged holidays while a further 45% said they were unsure. Therefore there is scope to investigate and develop this area of work further and to encourage tourism businesses to develop packages.

Frequency of visits

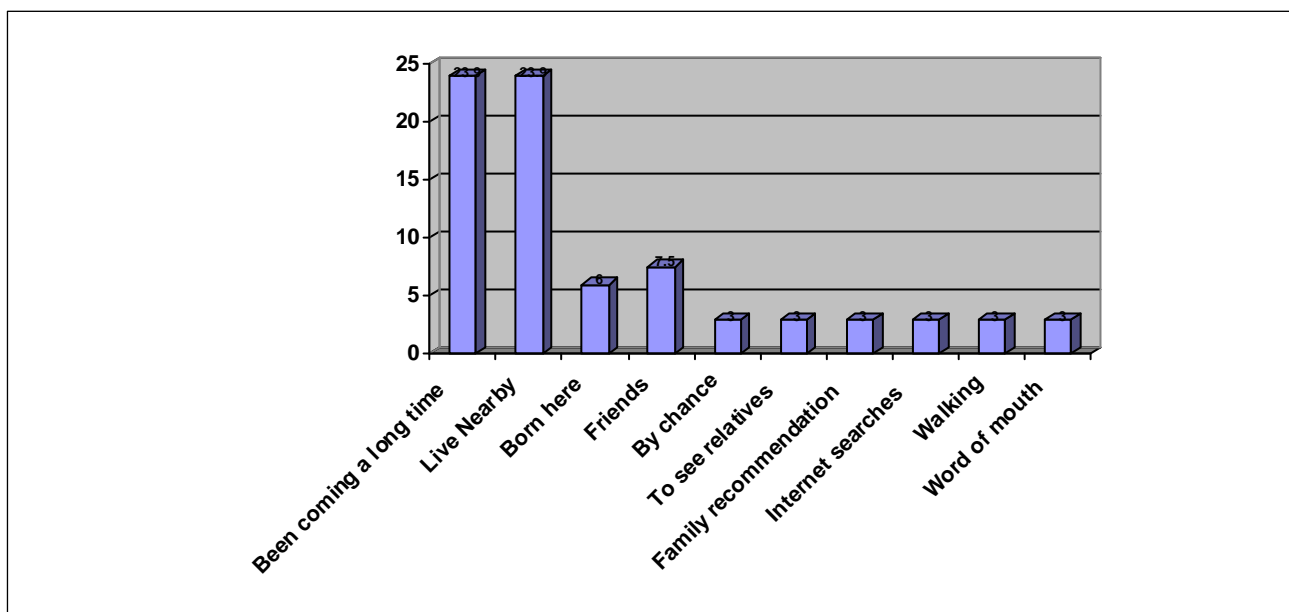
Figure 6: Frequency of visits



The highest response occurred in the 'regular visitor living outside the AONB' which is a similar pattern to 2011. There were fewer first time visitors than 2011 but overall frequency of visits shows similar patterns across the three years.

How visitors discovered Bowland

Figure 7: How did you discover Bowland?

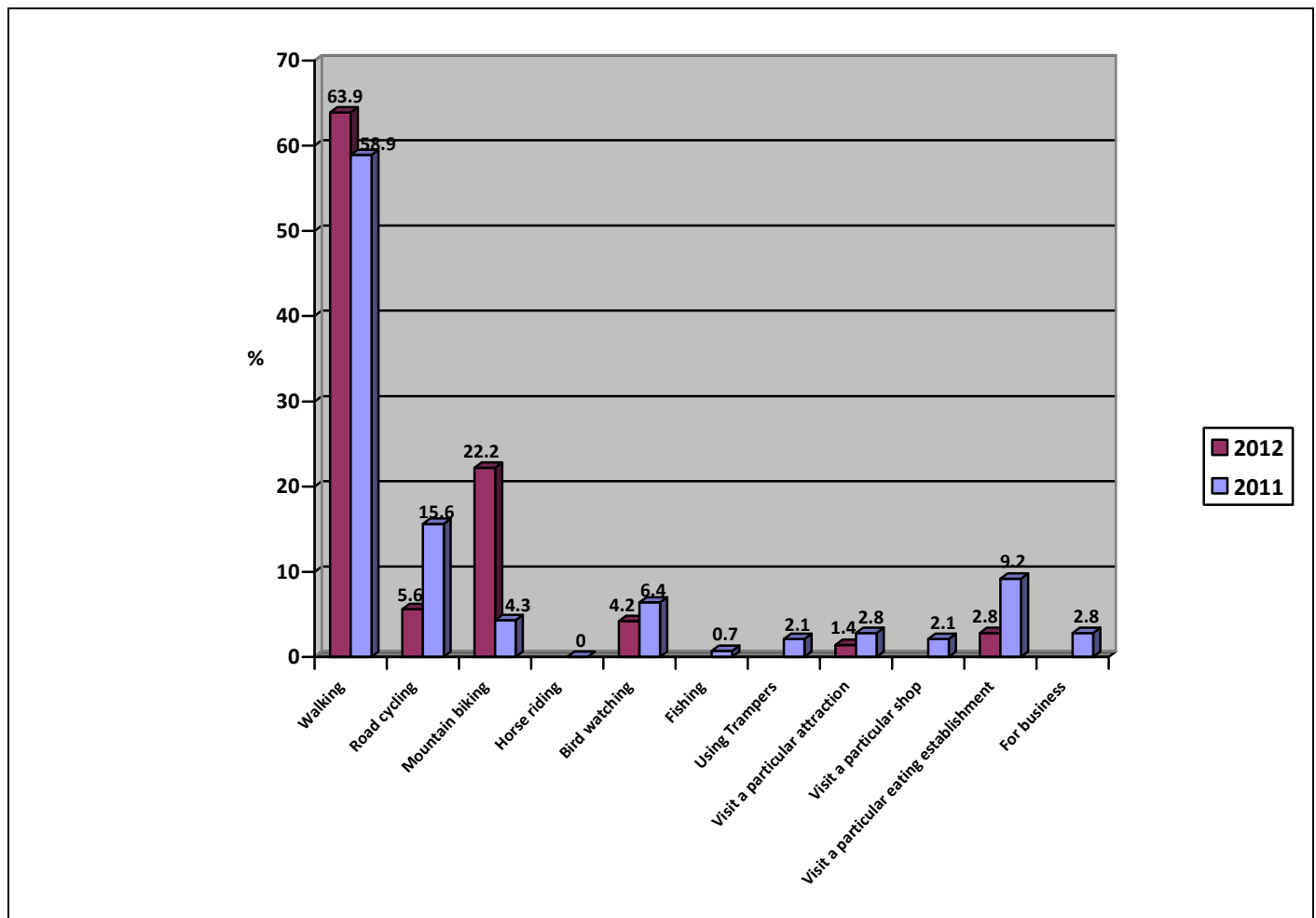


This question was new for 2012. Even though this was a qualitative question we were able to draw some categories for the most common responses. Many visitors to Bowland have been coming for a long time, many since childhood and many of them live close by and some had found out about Bowland via friends (7.5%). This pattern mirrors earlier findings with a high percentage of local day visitors.

The Tourism Offer

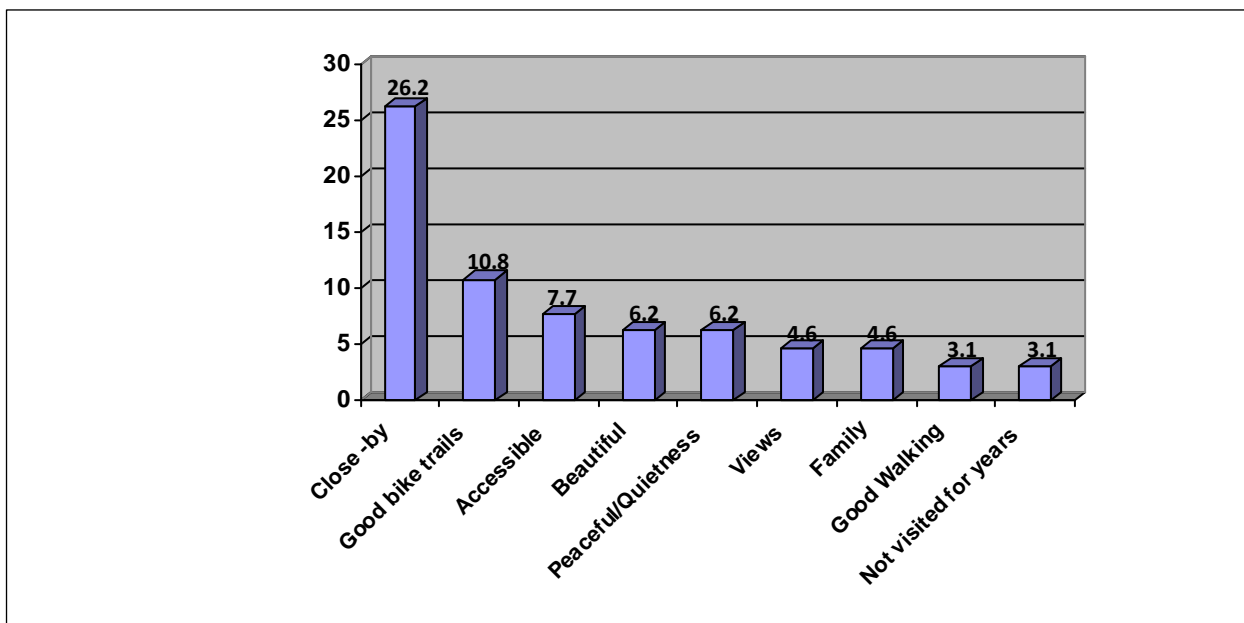
In 2012 we modified this question to ask visitors the MAIN reason why they were visiting Bowland as opposed to SEVERAL reasons. A high percentage of visitors (64%) were visiting the area for walking, followed by 22% visiting for mountain biking, these results differ slightly from those in 2011 (59% walking and 55% for a pleasure visit). As in previous years walking is the main reason for people visiting Bowland. However in 2012 more visitors were coming for mountain biking.

Figure 8: Reasons for visiting Bowland



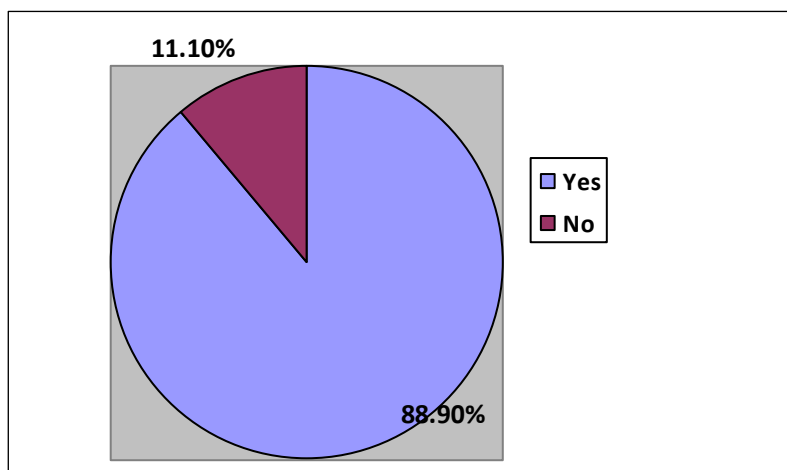
A new question added for 2012 (Figure 9) and although this was a qualitative type question we were able to draw a number of categories. The main reason why people were choosing Bowland over other areas is because it was close by. However, a lot of people commented on the aesthetics such as it being beautiful, peaceful and quiet, as well as having good bike trails.

Figure 9: Why visitors choose Bowland over other areas



89% of visitors knew that the Forest of Bowland was an Area of Outstanding Natural Beauty (91% in 2011, 88% in 2009); therefore awareness of the designation is consistently very high. This can be attributed to the sustainable tourism work carried out by the AONB over the last few years, including production of tourism leaflets, continued development of the AONB website, interpretation and training with businesses. This has involved using 'Sense of Place' and Green Tourism Business Scheme accreditation as mechanisms by which to encourage businesses to market the special qualities of the AONB in the marketing of their own businesses.

Figure 10: Did you know the Forest of Bowland is an area of Outstanding Natural Beauty?



Why visitors come to Bowland

In 2011, visitors were asked to describe what they liked best about the Forest of Bowland AONB; the most frequently used words were:

Scenery, Peace, Beauty, Quiet, Walking and Natural Beauty

Similar phrases and words were used to describe Bowland in 2012 as follows:

- Unspoiled beautiful countryside
- Wild, peaceful, unaltered
- Quiet countryside of undisturbed peace
- New area to discover
- Fantastic birdlife
- Feeling of getting away.

For a full list of responses see Appendix I.

Aspects that could have made the visitor experience more enjoyable

Generally visitors were happy with their visit and didn't want anything changing, however a few common responses were to have better signposting, toilets and facilities. A few people mentioned the weather, obviously a factor we can't influence, although there are opportunities for the AONB and businesses to develop rainy day itineraries for visitors.

How the recession has affected visitors

Nobody particularly commented on the fact that their visits to Bowland had changed because of the recession. Although a few people commented that they had visited more often because it's closer to home and involved less driving (rising fuel costs).

Key Findings

- In 2011 the majority of responses are in the 35+ age categories; with fewer responses in the younger age groups although for 2012 there is a higher response in 16-24 and 25-34 age categories.
- There are a higher percentage of visitors from the rest of the UK – 36% in comparison to 19% in 2009. Additionally, 3.4% of visitors in 2011 were from Europe or the Rest of the World while there were no visitors from outside the UK in 2009
- There has been a decrease in overnight visitors in 2012 to 10.8%, down from 28.6% in 2011 and 17% in 2009
- Length of stay has decreased from 5-7 nights in 2011 (52.2%) to 2-4 nights in 2012 (44.4%). Length of stay was also 2-4 nights in 2009 (66%)
- A quarter of respondents are repeat visitors, therefore loyalty to the area is developing
- Regular visitors from outside the AONB have decreased slightly from 2011 (43%) to 38% in 2012 but still significantly higher than 2009 (21%)
- A high percentage of visitors (64%) are visiting the area for walking, followed by 22% visiting for mountain biking. These results differ from those that emerged in 2011 (59% walking and 55% pleasure/general sightseeing) and in 2009 (54% walking and 59% for a pleasure visit)
- The aspects that visitors in 2011 valued most about the area are: Scenery, Peace, Beauty, Quiet, Walking and Natural Beauty.
Results proved similar in 2012 with visitors choosing words such as: unspoiled, wild, peaceful, unaltered, undisturbed, quiet, fantastic birdlife.
- 89% of 2012 visitors are aware that the Forest of Bowland is an Area of Outstanding Natural Beauty compared with 91% of visitors in 2011

Recommendations

- Investigate new ways of marketing the AONB outside of the region to increase visitor numbers, and continue to support businesses to market themselves and the protected area through initiatives such as Sense of Place training
- Maximise the opportunities for marketing Bowland via the gateway towns and Visitor Information Centres, investigate opportunities for touch screen promotion
- Continue to encourage opportunities for longer staying visitors, working with businesses to produce car free itineraries, family days out and wet weather itineraries
- Encourage businesses who have not already done so to look into online booking for their accommodation, visitors' preference for this method is increasing
- Continue to maintain the balance between encouraging numbers but encouraging visitors to partake in the most sustainable activities such as walking, cycling and horse riding, for example, developing business clusters to collectively market these opportunities.
- Continue to support and develop Bowland Experience – the AONB's sustainable tourism business network – this will provide the mechanism to deliver training, provide support and generate business clusters. It will also ensure that the area continues to be recognised as a destination in its own right
- Encourage younger age groups and families to the area by providing more focussed information relating to family activities, and encourage and support businesses to produce family activities and days out from their businesses
- With repeat visits increasing, encourage loyalty to the area by providing further interaction on the website and by encouraging businesses to generate offers for loyal, repeat customers
- Encourage businesses to 'package' breaks to encourage our key market of walkers, bird watchers and cyclists and maximise opportunities for 'nature tourism'
- Continue to support the development of promoted walking and cycling routes which are very popular with visitors. Look to increasing the number of family cycling routes based from businesses
- Continue to support Green Tourism Business Scheme accreditations, as visitors seeking out businesses with green credentials are growing. The accreditation also provides businesses with an effective framework to assist them in developing in a sustainable way
- Increase the profile and awareness of Trampers and Access for All routes
- Increase awareness of Festival Bowland by encouraging promotion of the events through partners and tourism businesses
- Maximise opportunities for attracting the younger visitors, especially mountain bikers who are starting to visit the area more regularly.

Appendix I

1.Location		
Answer Options	Response Percent	Response Count
Barley	15.20%	12
Beacon Fell	31.60%	25
Cocklett Hill	21.50%	17
Crook O'Lune	6.30%	5
Dunsop Bridge	3.80%	3
Forest of Bowland	5.10%	4
Slaidburn	10.10%	8
Other	6.30%	5
	Answered Question	79
	Skipped Question	0

2. How many people are in your group and which age bracket do they fit into?												
Number Options	1	2	3	4	5	6	7	8	9	10	Count	
0-5	0	2	3	3	1	0	0	0	0	0	9	
6 to 10	0	1	2	0	0	0	0	0	0	2	5	
11 to 15	0	0	1	4	4	0	0	0	0	2	11	
16-24	4	5	1	1	2	0	0	0	9	0	22	
25-34	4	8	6	6	2	0	0	0	0	0	26	
35-54	5	19	10	8	4	0	0	0	0	4	50	
55-64	6	26	1	0	0	6	0	0	0	0	39	
65+	1	9	3	4	2	0	0	0	0	2	21	
											Answered Question	76
											Skipped Question	3

3. Where do you live (village/town/country):		
		Response Count
	Answered Question	76
	Skipped Question	3

1.Bolton	20.Leyland	39.Gisburn	58.Settle
2.barrowford	21.Ashton-in-Makefield	40.Leeds	59.Tosside
3.Bolton	22.Aberdeen, Scotland	41.keighley	60.Cheshire

4.Trawden	23.Preston	42.Nr Whalley - clayton-le-moors	61.Garstang
5.Burnley	24.Ray Green	43.Bingley	62.Skipton
6.locally	25.Blackpool	44.Near Keighley	63.Cockermouth, Cumbria
7.Holden	26.Village	45.Hellifield	64.Hellifield
8.Lincolnshire	27.Ribchester	46.Halifax	65.Leeds
9.Skipton	28.Leyland	47.Clitheroe	66.Bolton
10.Barnoldswick	29.Fulwood - Preston	48.Leigh, Blackburn, Hambleton	67.bradford w.yorks
11.Burnley	30.Wigan	49.Colne	68.Saile
12.Newchurch	31.Lytham	50.Parbold	69.Heywood
13.Beverley East Yorkshire	32.Walton-le-Dale	51.Pudsey	70.Rochdale
14.Lancaster	33.Wigan	52.Pately Bridge	71.Lancaster
15.Fornby	34.Knowle Green	53.Skipton	72.UK
16.Preston	35.Longridge	54.Sawley	73.Silverdale
17.Preston	36.Garstang	55.Blackpool	74.Halifax
18.Preston	37.Lytham	56.Morecambe	75.Langho Lancashire
19.Walton Le Dale	38.Blackpool	57.Hosk Bank	76.Lytham St.Annes

4.Which of the following is correct for this visit?		
Answer Options	Response Percent	Response Count
Day Visitor	89.20%	66
Overnight Visitor	10.80%	8
	Answered Question	74
	Skipped Question	5
Overnight Visitors:- Please state where you are staying:	Tosside cottages	
	Pendle Inn	
	Preston	
	Wigan	
	Thurnham Hall (Lancaster)	
	Longridge	
	Beacon Fell View Park	

5. How many nights are you staying?		
Answer Options	Response Percent	Response Count
1 night	22.20%	2
2 to 4	44.40%	4
5 to 7	33.30%	3
8 to 10	0.00%	0
11 to 14	0.00%	0
15+	0.00%	0
	Answered Question	9
	Skipped Question	70

6. Would you be interested in packaged events/activities linked to your accomodation? E.g wildlife holidays		
Answer Options	Response Percent	Response Count
Yes	36.4	4
No	18.2	2
Unsure	45.4	5
	Answered Question	11
	Skipped Question	68

7. How often do you visit the Forest of Bowland?		
Answer Options	Response Percent	Response Count
First Visit	9.20%	7
Visited before, but not a regular visitor	15.80%	12
Visit a few times a year	26.30%	20
Regular visitor (living outside the FoB)	38.20%	29
Regular visitor (living within the FoB)	10.50%	8
	Answered Question	76
	Skipped Question	3

8. How did you discover Bowland?		
		Response Count
		67
	Answered Question	67
	Skipped Question	12
Responses:	1.Moving to the area	1
	2.Been coming a long	16
	3.Born here	4
	4.By chance	2
	5.Clients	1
	6.Live nearby	16
	7.Cycling	1
	8.Parents/relatives liv	2
	9.Family recommend	2
	10.Friends	5
	11.Clitheroe Market	1
	12.Group trip	1
	13.Information at Thur	1
	14.Internet searches	2
	15.Leaflet/guide book	1
	16.Maps	1
	17.Mountain biking	1
	18.Reading about He	1
	19.Single Traction Bil	1
	20.Travelling through	1
	21.Used to live here	1
	22.Childhood visits	1
	23.Walking	2
	24.Word of mouth	2

9. What is your MAIN reason for visiting the FoB today? (please select one)		
Answer Options	Response Percent	Response Count
Walking	46.60%	46
Road Cycling	5.60%	4
Mountain Biking	22.20%	16
Horse Riding	0%	0
Bird Watching	4.20%	3
Fishing	0%	0
Using Trampers	0%	0
Festival Bowland Event	0%	0
Visit a particular attraction	1.40%	1
Visit a particular shop	0%	0
Visit a particular eating establishment	2.80%	2
For business	0%	0
	Answered Question	72
	Skipped Question	7

Number	Any other reasons
1	also bird watching and short walk
2	and fishing
3	Beacon Fell
4	Beacon Fell
5	Beacon Fell Cafe
6	Birthday!
7	Enjoy
8	Enjoy scenery
9	enjoy scenery and visit eating establishment
10	Enroute to Morecambe. Nice drive
11	For a nice day out
12	Fungi photography
13	Lancashire
14	Motor tour to see autumn colours
15	Parkers Arms
16	Ranger Duty
17	Ranger Duty
18	Relaxation
19	Spread Eagle Sawley and nice weather today!
20	Stocks reservoir
21	To build up stamina

10. Why have you chosen to visit Bowland specifically, rather than another area of countryside?

	Response Count
	65
Answered Question	65
Skipped Question	14

Responses:

Dry Paths/good soup	1
Accessible	5
Beautiful	4
Because it has everything	1
Lovely views	3
Had been meaning to	1
Bike trails	7
Childhood memories	1
Close by	17
Coursework	1
Enjoy the drive	1
Quietness/peaceful	4
Enjoy it	1
Family	3
Bird watching	1
Good online write ups	1
Pendle Hill	1
Good walks	2
Road cycling	1
Low hills	1
More trees than Dales	2
Not been for years	2
Enroute to where we were going	1
Because of previous visits	1
Recommendations	1
Traffic lights in Long Preston	1
Children hadn't been before	1

11. Did you know the Forest of Bowland is an Area of Outstanding Natural Beauty?

Answer Options	Response Percent	Response Count
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Yes	88.90%	64
No	11.10%	8
Answered Question		72
Skipped Question		7

12. Describe in a few words what you like best about the FoB?

	Response Count
	67
Answered Question	67
Skipped Question	12

Responses:		
Wonderful scenery		Quietness, safety
Wilderness		Wilderness. Remoteness
Views		Similar to Hamilton, Scotland
Chance we may spot a hen harrier		Beauty. Wilderness. Ease of access.
Gods own country		Quiet
Views		Great for cycling
Unspoiled, beautiful countryside, lovely villa		Quiet. Nice scenery
Nice scenery		Beautiful countryside - especially in autumn
Beautiful scenery, and such a varied lands		Hills and quietness
Open access, wild, peaceful, unaltered		Manageable hill - Pendle Hill
Tranquility		Peaceful, different woodland
Variety of countryside. Quieter than the Da		Scenery
Has both wild and tame landscapes of Out		Walks
Ruralness		Walks, handiness
Close, pleasant, beautiful		Big
Scenery		Bit of peace
Off the beaten track		Close
Beautiful. Like the Lakes but nearer		Lush, green, peaceful
Fun		Peaceful. Birds. Nature
Quiet countryside of undisturbed peace		Views
Remoteness, scenery		Tranquil
Open space		Very little commercialisation
Beautiful		Views. Wildlife. Accessible paths
Beautiful area		Pretty and quiet
Beautiful. Well maintained trails		Peaceful
close to home. bird watching is really good		The views, the walks
Closest area to home		Feeling of getting away
Good bike trails		Peaceful and beautiful scenery
New area to discover		Walks, walls
No hassle		Beautiful scenery - fresh air
Outstanding beauty		Good/interesting
Quiet. Free parking. Free cycling		The woods
Quiet. Nice scenery		Trees, birds
		Unspoilt, natural environment

13. Is there anything that would have made your visit more enjoyable?

	Response Count
	60
Answered Question	60
Skipped Question	19

Responses:

Less is more	An engine
No	No
Unfortunately I forgot the map, it might help	Cycle partner
Signposts to get to forest and within forest	No
No	No
Weather	More than adequate
Sun	Sunshine
No	Signposts on sculpt
Bit of road widening between Sykes and C	No
No	No
Slightly warmer :)	Play areas
No	Improved catering
More cafes open	No
Weather	No
Not to mind	Confused by signs
No	No
Someone to go with	No
No	Facilities
Upkeep of tracks, some washing away	Keep toilet facilities
No	Better bike facilities
No	Wooden play area. 5
Facilities would be useful	No
Cafe, toilets, facilities	No
Weather	Better maps
Leaflets for routes	No
Better signs from Long Preston	No
Weather	No
No	Weather

