



FOREST OF BOWLAND

Area of Outstanding Natural Beauty

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Part I: Strategy

Strategy Introduction

Introduction

This document updates the first Strategy for Sustainable Tourism in the Forest of Bowland Area of Outstanding Natural Beauty (AONB) published in January 2005, and includes a new Action Plan for 2010-15 to accompany this Strategy. This revision to the Strategy and Action Plan was done in consultation with a wide range of partners.

The Forest of Bowland AONB was awarded the European Charter for Sustainable Tourism in Protected Areas in September 2005. This updated Strategy and Action Plan enables us to re-apply for the Charter in 2010 and to plan ahead for the next five years.

Our work in the area since 2005 (for details see Appendix I) has had several key outcomes:

- The Forest of Bowland AONB is seen more as a destination in its own right, rather than, for example, being 'close to the Yorkshire Dales and the Lake District'
- The special qualities of the area are better understood and promoted by partners, largely as a result of our Sense of Place work
- Businesses are fully engaged (through the Sustainable Tourism Business Network and Forum) in developing and promoting the area for sustainable tourism
- The sustainable tourism product has been significantly developed – in terms of new routeways, accommodation, activities and services
- Marketing and promotion of the Forest of Bowland AONB is better co-ordinated and of a high and branded quality

Our vision for sustainable tourism in the Forest of Bowland AONB is that:

'By 2015 the Forest of Bowland AONB will be a recognised destination for sustainable tourism. It will still be a hidden gem that visitors can make their personal discovery, and where they can enjoy high quality, sustainable and accessible activities and accommodation for all – characterised by the commitment and passion of business owners for this amazing and magical landscape.'

In order to achieve this vision we have identified 7 strategic aims which will further develop the identity, products and partnerships of the Forest of Bowland AONB:

1. Develop a strong brand identity for the Forest of Bowland AONB as a destination
2. Develop and promote tourism products which reflect and celebrate the Forest of Bowland AONB's sense of place
3. Develop and promote products which encourage quiet, accessible and quality enjoyment of the Forest of Bowland AONB
4. Support the area's tourism businesses to develop high quality and sustainable business practices, and to maintain a network of sustainable businesses
5. Support local communities and volunteers to ensure engagement in tourism planning, and to generate community benefit from tourism activity in the Forest of Bowland AONB
6. Develop and maintain partnerships supporting the development and management of sustainable tourism in the Forest of Bowland AONB
7. Develop strategies to improve the collection and analysis of tourism related data so that informed decisions can be made by all partners

Why a sustainable tourism strategy?

The special qualities of the Forest of Bowland AONB lie at the heart of its communities and their livelihoods, its landscapes and their managers, and its wildlife and their habitats. They are also a draw for visitors. These visitors, who often gain renewal and inspiration from time spent in the area, can bring with them both costs and benefits. The costs are most often felt as pressures, particularly on village communities but also on important habitats. The benefits lie in sharing the precious qualities of the area and widening understanding of them; in supporting local services that communities depend on; and in bringing new income to the area. There is also potential to look beyond this at ways in which tourism itself can support conservation activity within the Forest of Bowland AONB.

Latest estimates from STEAM¹ suggest that the Forest of Bowland AONB and its 2km buffer zone, see Appendix 7 map 1, now attract 4.27 million tourists a year, a 4% increase on 2004 figures. These visitors bring £465 million into the local economy. Around 1.5 million of these visitors stay overnight in the area, bed space being almost evenly divided between serviced and self catering accommodation. The remaining 2.7 million are day visitors, coming mostly from the surrounding areas of Lancashire, North and West Yorkshire.

The term 'Sustainable Tourism' is becoming more mainstream, and 75 protected areas in Europe now hold the Charter status, with many more planning to apply. In addition many tourism operators in the Forest of Bowland AONB are interested in, and committed to, improving their environmental performance, and encouraging their visitors to enjoy a more sustainable visit to the area.

The Charter requires a clearly identifiable and discrete sustainable tourism strategy. In revising this strategy, it is important to be mindful of the fact that a successful and appropriate strategy will first and foremost meet the needs and aspirations of the Forest of Bowland AONB. The requirements of the Charter will surely follow, and the Charter process allows for this by suggesting that the objectives of any strategy must be identified and expressed in ways that suit local circumstances. The Principles of the European Charter can clearly be related to the aims of this strategy, as shown on page 39 in Appendix 2.

What do we mean by sustainable tourism?

At its simplest, sustainable tourism can be said to be tourism that takes account of its current and future economic, social and environmental impacts, addressing, and seeking to balance, the needs of visitors, the industry, the environment and host communities. Making tourism more sustainable means taking these needs and impacts more fully into account in the planning, development and operation of tourism. It is a continual process. Sustainable tourism is of particular relevance to a protected area such as the Forest of Bowland AONB, as tourism needs to be encouraged to be sympathetic and supportive of that environment – and to enhance not detract from that quality landscape.

The new Department for Culture Media and Sport (DCMS) Framework for Sustainable Tourism in England² identifies six key challenges to achieving a more sustainable tourism sector. These are:

- Minimise environmental impact and resource use
- Address the impact of tourism transport
- Improve quality and make holidays available to all
- Improve the quality of tourism jobs
- Maintain and enhance community prosperity and quality of life
- Reduce the seasonality of demand

¹ 2007

² March 2009

The European Charter for Sustainable Tourism in Protected Areas

The European Charter for Sustainable Tourism in Protected Areas aims to encourage good practice by identifying those Parks which are meeting agreed requirements for the sustainable development and management of tourism. The term 'Park' is used to denote any protected area within the terms of the Charter, including Areas of Outstanding Natural Beauty. The Charter is awarded by the Europarc Federation, an umbrella organisation of over 500 protected areas across 37 countries.

Any park or protected area can apply for recognition that they are meeting the requirements of the Charter. It is important to appreciate that the Charter is about recognising protected areas which are following the right approach in developing and managing sustainable tourism. Currently³ there are 75 protected areas throughout Europe that are holders of the Charter, ten of which are in the UK. In addition there are around 20 Candidate Charter Parks, including Arnside & Silverdale, Kent Downs and North Pennines AONBs who hope to achieve that status in the next two years.

Parks seeking recognition as Charter Parks must agree to abide by 12 principles, all of which are relevant to the preparation of this sustainable tourism strategy. These are included as Appendix 2. However, they are not necessarily exhaustive of the issues that should be taken into consideration.

It is important to note that the Charter is awarded to the protected area, in our case the Forest of Bowland Area of Outstanding Natural Beauty. Part 2 of the Charter is awarded to individual businesses who operate within the area, and also meet criteria set by Europarc, in our case by the Atlantic Isles section of the Federation. The Forest of Bowland AONB was the first protected area in England to be awarded the Charter, and the first in Europe to award the Charter to businesses.

A strategy based on local opinion

This strategy is largely based on the balance of opinion emerging from a process of local consultation. It is important at the outset to recognise that the Forest of Bowland AONB does not exist in isolation from surrounding areas, and this has been recognised in the process of consultation. Following discussion in 2004, an area was selected that included a buffer zone extending 2km outwards around the Forest of Bowland AONB, to include Clitheroe, Garstang, High Bentham, Longridge, Lancaster and Settle, settlements that might be considered to have a 'gateway' function to the Forest of Bowland AONB. The administrative boundaries that cross the Forest of Bowland AONB mean that many consultees have responsibilities and interests that extend well beyond the area boundary, see Appendix 7 for maps of the area.

Consultation on this revised strategy has taken place in several stages:

- Feedback on work to date was requested at the Forest of Bowland AONB Sustainable Tourism Forum held at Hornby, on 23 April 2009, 10 individuals responded
- A Review day was held at Waddow Hall on 13 May 2009, and was attended by 12 tourism businesses and local authority tourism staff
- A visioning and action planning session was held during a Sustainable Tourism business network event on 25 June 2009 and was attended by 30 businesses
- An action planning event for the Sustainable Tourism Working Group was held on 2 July 2009
- The draft revised strategy and action plan was put out for consultation in October 2009 to the Sustainable Tourism Working Group (now the Forest of Bowland AONB Sustainable Tourism theme group) and key partners via the Forest of Bowland AONB website.

We would like to thank everyone who has participated in the consultation process. We have listened carefully to all contributions which are reflected in this Sustainable Tourism Strategy and Action Plan.

³ September 2009

Vision, Aims and Strategic Objectives

A vision for sustainable tourism in the Forest of Bowland AONB was developed by stakeholders:

'By 2015 the Forest of Bowland AONB will be a recognised destination for sustainable tourism. It will still be a hidden gem that visitors can make their personal discovery, and where they can enjoy high quality, sustainable, and accessible activities and accommodation for all – characterised by the commitment and passion of business owners for this amazing and magical landscape.'

This Vision underpins the Aims which follow:

Aim 1. Develop a strong brand identity for the Forest of Bowland AONB as a destination

The Forest of Bowland AONB is beginning to establish itself as a destination for people seeking a sustainable holiday. This 'destination identity' needs to be strengthened by continued promotion of a strong and consistent brand and set of messages, both by the protected area itself and all of its partners. The area also needs to be promoted to new visitors and over a longer season in order to ensure the future viability of tourism enterprises.

1.1 Develop a strong identity for the Forest of Bowland AONB

In order to develop a strong and consistent brand and set of messages the Forest of Bowland AONB needs to continue working closely with tourism professionals and businesses in the area to portray it as a protected landscape suitable for quiet enjoyment. This work will include both web based resources and training opportunities.

1.2 Continue to develop the Forest of Bowland AONB website as a brand leader for information, interactivity and interest

The Forest of Bowland AONB website was re launched in June 2009 and now fits within the brand guidelines.. The website is being continually updated and improved in order to increase its attractiveness, interactivity and information provision. Further developments and links have been identified by partners.

1.3 Develop scope for visitor information centres and Gateways to the Forest of Bowland AONB

The Forest of Bowland AONB is encircled by the gateway settlements of Settle, Bentham, Lancaster, Garstang, Preston, Longridge and Clitheroe, which have not been developed to their full potential as 'entrances' or 'service centres' for the area. Most of these, and a number of larger tourism businesses, could act as important visitor information centres for tourists and local people. It is important that staff at these centres have a good knowledge and understanding of the protected area and its special qualities. Ongoing training and familiarisation visits need to be continued, as does a steady stream of information via e-news and website updates.

1.4 Provide visitor publications to encourage quiet and sustainable enjoyment of the Forest of Bowland AONB

Although the Forest of Bowland AONB website is now becoming an important and principal source of information, many visitors still prefer to see printed publications about the area. For this reason there will be a continuing need to reprint existing, and develop new, publications in a sustainable manner.

1.5 Support initiatives which engage with groups that don't traditionally visit the Forest of Bowland AONB

Whilst the target market for the Forest of Bowland AONB is widely acknowledged to be the active over 50's, there is a need to widen the market in order to ensure a continued and sustainable market in future years. In particular, families and nearby urban residents are potential new visitors and need to be encouraged to visit and explore the area in a sustainable manner.

1.6 Develop and promote tourism products and events to encourage out of season visits to the Forest of Bowland AONB

As with many other rural and northern areas of the UK, the main holiday season in Bowland is usually limited to June through to September, with some Easter and Whitsun peaks, providing a maximum of five months activity and income generation for many operators. In order to encourage out of season visitors, and in particular staying visitors, it is important to explore new products and events which may entice visitors to the area during shoulder months.

Since 2009 the Bowland Festival has become a year round calendar of events rather than a one or two week period in June, and it is hoped that this will be a successful and long term shift. In addition other events, such as community and village events, arts activities and walking festivals, could benefit by being more closely linked to the Forest of Bowland AONB and its special qualities.

1.7 Ensure that promotion of public transport is embedded as part of all other promotional and media activity

A study commissioned by the Forest of Bowland AONB in 2007 recommended that any events and activities organised by the AONB Unit and partners should seek to link with public transport . We will attempt to put this into practice and also to provide public transport information embedded in other products, for example in downloadable walks.

Aim 2. Develop and promote tourism products which reflect and celebrate the Forest of Bowland AONB's sense of place

Over the last few years the AONB Unit has worked hard to develop a sense of place for the Forest of Bowland, as it is made up of a number of districts, natural features and landscape types. This has been successfully delivered via the Sense of Place Toolkit and training events, coupled with the themes used to brand the area, and by working closely with tourism professionals and businesses. This work needs to be continued and built upon in order to continue to raise awareness of the area's special qualities and reasons for designation.

2.1 Continue to develop and promote the Forest of Bowland AONB as a 'Place to Enjoy and Keep Special'

A Place to Enjoy and Keep Special is the Forest of Bowland AONB's principal theme, and encompasses the designation as an AONB and the opportunities for quiet enjoyment.

2.2 Support and encourage markets for 'Delicious Local Food and Drink' produced using sustainable land management practices

We have already developed a good database of local producers, and the need to source good quality local food is now an accepted part of many pub and restaurant business developments. There is a need to continue this work, often in partnership with other agencies, and to raise awareness of the link between locally sourced food and the management of our special landscape.

2.3 Develop products which celebrate 'a Landscape Rich in Heritage'

There is potential to make more of the heritage assets of the Forest of Bowland AONB, and this is an area of particular interest highlighted by our business partners. It is also a way of attracting new visitors to the area, and linking together heritage and sustainability messages.

2.4 Raise awareness of traditional skills and features seen in the Forest of Bowland AONB, and promote these as a 'Living Landscape'

A 'Living Landscape' refers to the land management practices carried out by estate owners, farmers and conservationists in the Forest of Bowland AONB. The landscape features, traditions and customs practised in the area are of great interest to visitors and opportunities to learn about these could lead to new prospects for business and training in the area.

2.5 Develop and promote products which celebrate 'A Special Place for Wildlife'

This a special place for wildlife, especially breeding upland and wading birds, wildflower meadows, woodlands and geological features. It is important that, as well as providing opportunities for visitors to find out more about the wildlife, that they do so in a way that does not disturb or disrupt the very creatures and habitats they are hoping to see.

2.6 Ensure the sustainability of 'Wild Open Spaces'

The upland moors are some of the most breathtaking and unspoilt areas of Forest of Bowland AONB. It is important that visitors can enjoy this space and its feeling of grandeur and isolation without disturbing wildlife, getting lost and disorientated, or putting themselves in danger.

Aim 3. Develop and promote products which encourage quiet, accessible and quality enjoyment of the Forest of Bowland AONB

Since the Forest of Bowland AONB was awarded the Charter in 2005 integrating our access and recreation work with sustainable tourism has been a high priority. Working closely with Lancashire County Council and Wyre's countryside services enables the Forest of Bowland AONB to provide high quality access to the countryside for people of all abilities. Our sustainability agenda has enabled us to promote routes to a wider audience via the website and events, and to open routes for people of all abilities wherever possible.

3.1 Continue the development and promotion of a network of routeways to enable good quality easy access to the countryside

Visitors to the Forest of Bowland AONB regularly seek out walking and cycling routes to explore the area. The Forest of Bowland AONB now offers over 50 promoted routes available as 'downloadable' walks, cycle rides or tramper trails to offer that are all maintained to a high quality. In order to respond to demands to develop new routes we need to ensure that resources are available to develop and maintain these routes to the same high standard.

3.2 Develop new and existing cycling opportunities

Cycling, both on and off road and mountain biking, is increasing in popularity in the Forest of Bowland AONB and it is important that we respond to this demand with safe, sustainable routes and facilities. In many cases we can support the work of more specialist cycling officers at the local county councils, as well as working with local landowners such as United Utilities and Forest Enterprise at Gisburn Forest.

3.3 Provide 'Access for All' wherever possible

Working closely with Lancashire County Council and Wyre countryside services we have adopted their commitment to providing access for all wherever possible. This may require the provision of high quality all ability access, such as at Scorton Millennium Way, or adapted route provision for Trumper, wheelchair and pushchair use. Linking accessibility to the countryside with accessible accommodation also makes good business sense for many of our partners involved in sustainable tourism.

3.4 Ensure good visitor management exists in order to provide sustainable recreational use of the area

In the Forest of Bowland AONB visitor pressure is only an issue in a small number of destinations, or honeypots, on a limited number of occasions throughout the year. However, we do seek to disperse visitors by providing events and activities throughout the Forest of Bowland AONB whenever possible. New recreational products are also attracting potential new visitors to the area and we should support these where appropriate to the purposes of the Forest of Bowland AONB.

3.5 Continue to provide opportunities for 'quiet' and less active enjoyment of the area

As well as active recreational pursuits, the Forest of Bowland AONB also offers space for solitude and quiet enjoyment of the area. We are exploring the potential to develop these opportunities and partners who can market and promote them.

Aim 4. Support the area's tourism businesses to develop high quality and sustainable business practices, and to maintain a network of sustainable of businesses

Since the Forest of Bowland AONB was awarded the European Charter in 2005 working with our tourism businesses has been a high priority. We appointed a part time Business Development Officer in 2006 and he continues to work with us and support over 100 members⁴ of the Sustainable Tourism Business Network, soon to become Bowland Experience Ltd. In addition, in 2008 we appointed a Sustainable Tourism Officer to deliver the Lancashire Green Tourism Project. As a result of this work over 30 businesses have now become European Charter business partners, the first in the UK. Our aim for 2010 and beyond is to continue this ground breaking work and to continue to deliver excellent business support.

4.1 Support and extend the Forest of Bowland AONB sustainable tourism business network

The business network is in the process of transforming into a more sustainable body – a company limited by guarantee with all profits going to the Bowland Tourism and Environment Fund. This new organisation is managed by the businesses themselves and will be able to advertise, trade and seek funding to develop projects.

4.2 Support 'Cluster' developments

Offering packages to visitors in the form of accommodation and linked activities is popular in some areas, and relatively untested in the Forest of Bowland AONB. We want to pilot some packages or clusters where visitors can book accommodation alongside activities such as mountain biking, Trammer use, or visiting heritage sites. The activity and accommodation providers will be supported in working together on co-ordinated marketing opportunities.

4.3 Offer training and information to businesses and partners to increase their sustainability and marketing potential

Businesses we work with are often keen to develop their business skills, especially if related to marketing and learning from good practice. We will continue to offer this support wherever possible, and utilise training offered by partners where appropriate. Networking of information, particularly relating to funding and promotional opportunities will also be continued.

4.4 Promote GTBS awards

The Green Tourism Business Scheme awards provide recognised accreditation for improved sustainable management of tourism businesses. In the Forest of Bowland AONB we piloted the scheme in 2007/08 and now support its development throughout the county as part of the Lancashire Green Tourism Project. Graduating from the scheme enables Bowland businesses to become European Charter Business Partners and so is an important part of our continued commitment to the Charter.

4.5 Develop BTEF as a visitor payback scheme

The Bowland Tourism and Environment Fund (BTEF) has been in existence for many years, and is currently undergoing a revival as a charity. The BTEF will receive any profits generated by the Bowland

⁴ as of December 2009

Experience company, and also receive donations from visitor payback schemes run by individual or clusters of businesses.

4.6. Support initiatives which seek to manage and reduce the demand for car use within the Forest of Bowland AONB

Businesses will be encouraged and supported to link their accommodation and activities to buses or trains, and to encourage staying visitors and nearby residents to visit the Forest of Bowland AONB without using a car.

Aim 5. Support local communities and volunteers to ensure engagement in tourism planning, and to generate community benefit from tourism activity in the Forest of Bowland AONB

Working with communities to ensure that they can be involved with and benefit from sustainable tourism is a key to the future viability of the area and the communities that live here. Visitors can support local services such as pubs, village halls and bus services as well as providing an income to tourism businesses. Celebrating local distinctiveness can bring rewards and interest to local people and visitors alike, and volunteering in the Forest of Bowland AONB is open to everyone.

5.1 Support communities in identifying and celebrating their local distinctiveness, and developing projects to promote this to locals and visitors alike

We have worked closely with communities over the last 4 years and feel that there has been an improved perception of visitors and tourism in that time. We want to continue offering support and funding to communities who want to celebrate their place in the Forest of Bowland's landscape, and to interpret that for visitors and the wider community.

5.2 Support volunteering opportunities linked with tourism in the Forest Of Bowland AONB

Volunteers from within the Forest of Bowland's communities and from further afield are a vital part of the tourism offer we have. Volunteers are often experts in their own field, whether it is dry stone walling or bird watching, and they can convey this interest with passion to visitors. We want to encourage this, and also traditional volunteering projects such as hedge laying, trail building and balsam eradication.

Aim 6. Develop and maintain partnerships supporting the development and management of sustainable tourism in the Forest of Bowland AONB

As a European Charter Park member it is important to us to promote our work and best practice, and to learn from other areas and agencies involved in similar work. This helps to develop our profile on a local, regional and national scale and also helps to secure funding when required.

6.1 Forge stronger links with local authorities within the Forest of Bowland AONB

There are six district and two county councils on the Forest of Bowland AONB JAC. It is important that we keep them informed and involved in our activities and that they 'spread the word' and dovetail with our work. We will also forge stronger links with the local communities within the Forest of Bowland AONB

6.2 Raise the profile of sustainable tourism in the Forest of Bowland Forest of Bowland AONB with regional and national bodies

Regional tourism agencies, North West Regional Development Agency and Welcome to Yorkshire, and national bodies such as Visit England are interested in our work. It is important that we keep our high profile and influence any new policies relating to sustainable tourism and businesses in the region.

Aim 7. Develop a framework to improve the collection and analysis of tourism related data so that informed decisions can be made by all partners

Knowledge about business performance and experiences, and visitor patterns and profiles can help us to provide appropriate support to businesses and facilities for visitors, as well as helping us to plan for future developments in the area. We are aware that other partners also collect and analyse similar data and it is important that we share and compare information.

7.1 Carry out regular visitor and business surveys and feedback results

Until 2008 we carried out a survey of enterprises every two years, we have now increased this to an annual survey using an online system that makes it more easily compiled and analysed. This survey looks at business performance and perception of visitors, and we now want to extend this to include more quantitative information such as occupancy.

7.2 Assess the impact of products and promotions within the Forest of Bowland AONB

Some of our existing work needs to be evaluated to assess its effectiveness and impact, in order to continually improve our products and services. This includes the impact of marketing the GTBS accreditation, and usage of the website and particular products within it, such as the downloadable routes.

7.3 Obtain reliable data on visitor surveys, profiles, needs and future markets

We are aware of the need to continually review and re-assess our direction, and looking at visitor profiles and future target markets is part of this. We want to involve our business partners more in this work and to encourage them to widen our visitor appeal and feedback information to the Network . A framework will be developed to co-ordinate data collection, and to help the sharing of data and trends discerned from it.

Indicators

The table below sets out our aims and the headline indicators we will monitor them against between 2010 and 2015

	Aim	Headline indicator
1	Develop a strong brand identity for the Forest of Bowland AONB as a destination	Increase in visitors recognition of the brand
2	Develop and promote tourism products which reflect and celebrate the Forest of Bowland's sense of place	Increase in the number and range of products available
3	Develop and promote products which encourage quiet, accessible and quality enjoyment of the Forest of Bowland AONB	Increase in levels of visitor satisfaction
4	Support the area's tourism businesses to develop high quality and sustainable business practices, and to maintain a sustainable network of businesses	Increase in membership and turnover of Bowland Experience
5	Support local communities and volunteers to ensure engagement in tourism planning, and to generate community benefit from tourism activity in the Forest of Bowland AONB	Increase in number of volunteers and communities engaged in Forest of Bowland AONB activities
6	Develop and maintain partnerships supporting the development and management of sustainable tourism in the Forest of Bowland AONB	Increase in number of partners embedding principles of sustainable tourism in their own strategies
7	Develop a framework to improve the collection and analysis of tourism related data so that informed decisions can be made by all partners	Framework developed and information shared – milestones to be generated

Resources

Staff resources

The partnership of the Forest of Bowland Area of Outstanding Natural Beauty consists of up to sixty organisations. The partnership is steered by the Joint Advisory Committee (JAC), an advisory body comprising around twenty organisations, which provides regular liaison between the range of organisations and interests in the Forest of Bowland AONB. A Sustainable Tourism Theme Group, drawn from partners, reports to the JAC and oversees the development and delivery of projects identified within the Forest of Bowland AONB Management Plan which refer specifically to sustainable tourism. The Theme Group is also responsible for the delivery of this Strategy.

The dedicated staff resource available to the Forest of Bowland AONB Unit currently consists of a team of seven officers: an AONB Principal Officer, Development & Funding Officer, Communications Officer, Business Development Officer, Sustainable Tourism Officer, Community Projects Officer and the Landscape Stories Project Officer; there is also a part time vacancy. The team is located as a unit within the Environment Directorate of Lancashire County Council (LCC), and are based at the Stables, in Root Hill Estate Yard in Dunsop Bridge.

The core and project funding for the Forest of Bowland AONB partnership comes from Natural England, and is matched at a ratio of 75:25 by the six district and two county councils whose areas incorporate sections of the Forest of Bowland AONB, and United Utilities. A memorandum of understanding is signed by all Forest of Bowland AONB partner local authorities and Natural England.

Four of the staff team are funded through this partnership funding. Additional funding in the form of grant support from a number of other agencies and organisations, including the Lancashire & Blackpool Tourist Board (LBTB), Lancashire County Developments Ltd (LCDL), Heritage Lottery Fund and others, contribute to the other three staff posts and their project and programme delivery costs.

In addition to the Forest of Bowland AONB unit, LCC Countryside Service have two Countryside Officers dedicated almost entirely to the Forest of Bowland AONB; Bowland East, Bowland North and West, and a third covers a significant area alongside duties in East Lancashire. Wyre Borough Council operate a Countryside Service that includes parts of the Forest of Bowland AONB. A full-time and volunteer LCC ranger service operates in the area, focussing primarily on access and visitor management in the area's honeypot sites and access land.

For more details see Appendix 6.

Partnership working

There is a strong history of the successful co-ordination and management of partnership working across the Forest of Bowland AONB. Agreed actions in the Management Plan are delivered in partnership by a range of organisations that include: Lancashire Wildlife Trust; Royal Society for the Protection of Birds; local landowners and farmers; United Utilities; Forestry Commission; and the local community.

Such partnership working underpins implementation of the AONB Management Plan, and is co-ordinated via a number of themed working groups who report to the JAC. One of these theme groups is focussed on sustainable tourism and incorporates the work of the Forest of Bowland AONB Unit and partners involved in tourism, and focuses on the delivery of this Strategy which is essentially incorporated into the AONB Management Plan. Although sustainable tourism is just one part of the whole spectrum of actions proposed within the AONB Management Plan, it is clear that to thrive, sustainable tourism in the Forest of Bowland AONB will depend on successful implementation of many of those other actions.

Partnership with the tourism business community is core to the success of the Forest of Bowland AONB's sustainable tourism work. The strong commitment of local businesses to sustainability, their passion for the area, and knowledge about its special qualities have been vital to the success of sustainable tourism in the area to date, and into the future

Resources committed for future delivery

Work developing sustainable tourism in the Forest of Bowland AONB has been funded and supported via the AONB partnership, business support and grant funding. The AONB Unit has proved itself to be a successful delivery agent for grant funding, creating positive outcomes both for the local area and in terms of regional development, see Appendix 3.

Successful delivery of this Strategy for Sustainable Tourism requires continued strong commitment from the Forest of Bowland AONB, and considerable resources being put into the work of the staff involved in the Lancashire Green Tourism Project, currently the Sustainable Tourism Officer and Business Development Officer, and other staff in closely connected areas of work such as Countryside Service staff, the Community Projects Officer and the Development & Funding Officer.

The Lancashire Green Tourism project is currently funded by the Forest of Bowland AONB via the Sustainable Development Fund, with major costs being covered by LBTB and LCDL⁵. The Sustainable Tourism Officer works across the whole of Lancashire for 3.5 days a week, although at least 50% of her time is focussed on the Forest of Bowland AONB. The other 1.5 days of this post are funded by the Forest of Bowland AONB and are focussed on web development work. The Business Development Officer works 1.5 days a week for the project plus 1.5 for the Forest of Bowland AONB, and is entirely focussed on the protected area. The project is due to complete in October 2011, and it will be vitally important to identify new resources to continue the delivery of both business support and sustainable tourism functions in order to continue to deliver this strategy after this date.

There is also a need to continue to strengthen the arrangements for partnership working across the border between North Yorkshire and Lancashire, which is also a regional boundary. In particular, arrangements to secure support from North West Development Agency and Yorkshire Forward would be particularly helpful for certain areas of work, possibly via the Rural Development Programme for England. And it is hoped that developments in the Yorkshire Dales National Park to deliver on their sustainable tourism strategy will have positive impacts on Bowland businesses operating in Craven district from 2010 onwards.

The Forest of Bowland AONB Unit may be too small to make an impression on its own in terms of marketing the area as a sustainable tourism destination, where widespread consumer awareness and market support are required for success. Our vision is for initiatives to be tackled collectively by the businesses and by the Tourist Boards and Partnerships which support the Forest of Bowland AONB, and in conjunction with other protected areas, such as a group of National Parks and AONBs working together across northern England, particularly those involved in Europarc and the Charter.

These goals are within our grasp, and we look forward to the challenges of the future.

⁵ £41,000 and £100,000 respectively for a 3 year period October 2008-2011 with in kind support from LCC, the businesses involved and LBTB

Part 2: Background Information

The Forest of Bowland Area of Outstanding Natural Beauty – an introduction

The Forest of Bowland AONB area

The Forest of Bowland Area of Outstanding Natural Beauty lies in the upland Pennine area of northwest England. The isolated and dramatic scenery of the fells contrasts with the area's pastoral river valleys and the traditional villages of the Ribble, Hodder and Lune Valleys. On its southern edge, Pendle Hill forms a distinct outlier, separated by the Ribble Valley from the main mass of the AONB. Farming and game management dominate the land use of the area.

The Forest of Bowland AONB covers 312 square miles, 803 square kilometres, and is located between two National Parks, the Lake District to the north and the Yorkshire Dales to the east. Although primarily in Lancashire, parts of the north and east of the Forest of Bowland AONB lie within the Craven District of North Yorkshire. The area is within easy reach of large centres of population concentrated to the south and east of Lancashire; one million people live within a 30 minute journey of the Forest of Bowland AONB, with the conurbations of Manchester, Merseyside and West Yorkshire just 90 minutes away.

What makes the Forest of Bowland AONB special?

The Forest of Bowland AONB is an area of national and international importance because of its unspoiled and richly diverse landscapes and wildlife. The moorland habitat is an important breeding ground for upland birds, and the major part of the Bowland Fells is designated as a Special Protection Area (SPA) under the European Birds Directive.

The key characteristics that make the area special have been identified as:

- Grandeur and isolation of the upland core
- Open expanses of moorland
- Cultural landscape of upland farming
- Historic landscape management as royal hunting forest and more recently as sporting estates
- Rural landscape of dry stone-wall enclosed pastures, stone built farms and villages
- Wooded pastoral scenery and parkland
- Steep scraps, deeply incised cloughs and wooded valleys
- Broad river valleys
- Contrasting gritstone/limestone geology

The area's Sense of Place, as defined by a project run in 2005, can be summarised as:

- A place to enjoy and keep special
- Delicious local food and drink
- A landscape rich in heritage
- A living landscape
- Wild open spaces
- A special place for wildlife
- Vibrant local communities

National Purposes of Areas of Outstanding Natural Beauty

Natural England currently identifies the following objectives for AONBs⁶

- The primary purpose of AONB designation is to conserve and enhance natural beauty;
- In pursuing the primary objective of designation account should be taken of the needs of agriculture, forestry, other rural industries and of the economic and social needs of local communities. Particular regard should be paid to promoting sustainable forms of social and economic development that in themselves conserve and enhance the environment.
- Recreation will not be an objective of designation but the demand for recreation should be met so far as this is consistent with the conservation of natural beauty and the needs of agriculture, forestry and other uses.

Although not a conservation board, the Forest of Bowland AONB Joint Advisory Committee has decided to adopt and seek to work towards the additional purpose of increasing the understanding and enjoyment by the public of the special qualities of the Forest of Bowland AONB. This is particularly significant in the context of sustainable tourism within the AONB.

An overall strategic and management context

The Countryside and Rights of Way Act 2000 made clear that the landscapes of AONBs were of equal standing to National Parks. It also gave new responsibilities for the preparation of Management Plans for AONBs.

A new Management Plan was prepared for the Forest of Bowland AONB in 2009 which, together with its five year action plan, provides the overall context for this Strategy for Sustainable Tourism for the Forest of Bowland AONB. The existing sustainable tourism strategy, and some proposed new areas of work were incorporated into the revised Management Plan, see supporting documents or the website for a full copy.

The plan is based on the following vision of how the Forest of Bowland AONB should look in five years time:

The Forest of Bowland AONB retains its sense of local distinctiveness, notably the large-scale open moorland character of the Bowland Fells, traditional buildings and settlement patterns of villages, hamlets and farmsteads. Natural and cultural resources are sympathetically managed and contribute to a sustainable and vibrant local economy. The management of the Forest of Bowland AONB has improved the quality of the landscape for all stakeholders.

The overall vision is given more depth by being broken down into six themes.

- Natural and cultural landscape
- Enjoyment health and wellbeing
- Economy
- Community
- Working in partnership
- Responding to climate change

The majority of sustainable tourism objectives and actions are included in the 'Enjoyment, health and wellbeing' section of the plan, with other actions also included in the 'Economy' and 'Community' themes.

⁶ CA24 Areas of Outstanding Natural Beauty - A guide for FOREST OF BOWLAND AONB partnership members

Specific objectives in the Forest of Bowland AONB Management Plan which relate to sustainable tourism are:

- 7.1 Support opportunities for quiet and responsible enjoyment of the AONB in keeping with the conservation and enhancement of natural beauty
- 7.2 Develop targeted tourism 'packages' combining local enterprise, established access routes and public transport
- 7.4 Promote environmentally responsible behaviour among local businesses, communities and visitors
- 7.6 Work with new and established tourism operators to promote the AONB as a destination for high quality sustainable tourism
- 8.2 Support and encourage 'access for all' to the AONB
- 8.3 Co-ordinate and support the sustainable management of major tourist sites, aka 'honeypots'
- 9.2 Maximise the resources of AONB partners and others in promoting sustainable transport
- 9.6 Support initiatives which seek to manage and reduce the demand for car use, and parking, within the AONB
- 10.2 Support and encourage the economic market for local farm goods that are produced using sustainable land management practices
- 11.2 Support sustainable local enterprise
- 14.2 Support and promote community-led activities that aim to conserve and/or enhance local distinctiveness and a 'sense of place'
- 14.3 Support volunteering in the AONB

It is also important to consider the fifth theme of the Forest of Bowland AONB Management Plan: *Working in Partnership*

There is a strong history of successful partnership working in rural Lancashire in general, and in the Forest of Bowland AONB in particular. In contrast with National Parks, the whole range of activities of Areas of Outstanding Natural Beauty would be constrained by their limited budgets and staff support were it not for the development of effective partnerships. Over the last five years considerable time and effort has been invested in forging and maintaining relationships with the tourism sector in the Forest of Bowland AONB. This included the development of the very successful Sustainable Tourism Business Network which currently⁷ has 102 members who meet regularly, interact by email and blogs and benefit from regular information, training and other opportunities offered by the AONB Unit. This Network is being developed into a stand-alone private sector company, Bowland Experience Limited, which will be used as a vehicle for tourism business support and promotion.

Feedback from members of the Sustainable Tourism Forum held in April 2009 showed that 'communication with the AONB team' was the most highly regarded aspect of sustainable tourism work in the Forest of Bowland AONB.

In addition the AONB Unit has worked increasingly closely with Lancashire & Blackpool Tourist Board and LCDL and has influenced and integrated with their work on rural tourism, the Country Escapes short breaks promotion⁸, and the current Lancashire Green Tourism Project.

⁷ September 2009

⁸ See Appendix 4 case study 5

An Assessment of Tourism in the Forest of Bowland AONB

A destination for recreation and sustainable tourism

The Forest of Bowland AONB is a popular recreational resource and visitor destination for the surrounding urban settlements of Lancashire and West Yorkshire. Its relatively 'undiscovered' character is highly valued and generates great loyalty amongst local people and visitors who discover its pleasures.

The Forest of Bowland AONB is not yet fully established as a tourism destination, and attracts fewer staying visitors than neighbouring Lake District and Yorkshire Dales National Parks. However, tourism, especially in the form of day visitors, has particular importance for the economy of some parts of the Forest of Bowland AONB and its immediate surroundings, for example the Ribble Valley, Wyre, Lancaster and Settle.

Staying visits to the area can be combined with time spent in the Lake District, Yorkshire Dales, or on the Lancashire coast. Proximity to these locations is sometimes used as a selling point for accommodation in the Forest of Bowland AONB. However, there are an increasing number of businesses who promote themselves as being within the Forest of Bowland AONB, a destination in its own right, with 88% of tourism businesses from the 2009 Business Enterprise Survey stating they market themselves as being part of the Forest of Bowland AONB.

Specific areas of the Forest of Bowland AONB experience a large number of day visitors, especially during public holidays and weekends. The 2009 Visitor Survey revealed that 68% of respondents were day visitors, while 17% were staying visitors and 12% were residents of the Forest of Bowland AONB.

Walking is the main recreational activity within the Forest of Bowland AONB, with opportunities to engage in other quiet activities such as cycling, riding, fishing, canoeing, gliding and parascending. Results from the 2009 Visitor Survey revealed that 22% of respondents stated their main reason for visiting was for walking, this was at a high of 62% in 2008, with 24% visiting for pleasure and sightseeing. 14% were specifically visiting the Forest of Bowland AONB 'as a destination' and 9% for cycling. Respondents were asked to state what they liked best about the Forest of Bowland AONB, to which the two most frequent responses were the 'scenery and landscape' and the 'peace and quiet'.

For more results and findings of the 2009 and previous visitor surveys see Appendix 5.

Regional strategic context and structural change

Protected areas often include natural features that cross administrative boundaries, and the Forest of Bowland AONB is no exception. For visitors and the tourism industry, the administrative complexity of the area had previously led to a lack of clear identity for the Forest of Bowland AONB, and a degree of confusion. Administrative arrangements are particularly complex, as the Forest of Bowland AONB falls within the remit of six district councils; Craven District Council, Lancaster City Council, Pendle Borough Council, Preston City Council, Ribble Valley Borough Council and Wyre Borough Council, two county councils; Lancashire and North Yorkshire, and two regions; the North West and Yorkshire and Humberside. The Yorkshire Dales National Park adjoins the north-eastern parts of the Forest of Bowland AONB.

Tourism Development

Large parts of the Forest of Bowland AONB relate to the Lancashire and Blackpool Tourist Board, whilst the 10% of the AONB within Craven is supported by the Yorkshire Dales and Harrogate Tourism Partnership, as part of Welcome to Yorkshire.

The North West Regional Development Agency (NWDA) has strategic responsibility for tourism in the North West and aims to position the North West as the best tourism destination in Britain, enticing more visitors to the region. The North West Tourism Strategy,

due for renewal and incorporation in to the new Regional Strategy in 2010, focuses on nine different marketing themes. The theme of greatest relevance here is 'The Countryside', where the North West is presented as 'a green region', and a marketing campaign that focuses on the promotion of world-class countryside, emphasising the quality of the environment.

In addition, the North West Action Plan for sustainable tourism identifies many actions already recognised within our work– such as adopting the Green Tourism Business Scheme, working with and supporting business clusters, identifying beacon businesses who excel in being sustainable, encouraging 'visitor payback' supporting the development of a 'sense of place' and procuring local food, drink and other products.

The Natural Tourism project, part of the Natural Economy team, run by NWDA and Natural England, has identified sustainable tourism work in the Forest of Bowland AONB as a demonstration project and good practice case study, both for its Sense of Place work and delivery of its sustainable tourism strategy generally. See also Appendix 4 case study 3.

The NWDA co-ordinates and provides resources to five sub-regional tourist boards or Destination Management Organisations (DMOs) including the Lancashire and Blackpool Tourist Board. LBTB is therefore the primary delivery partner for tourism in the sub region which includes the Forest of Bowland AONB.

The Visitor Economy Strategy for Lancashire and Blackpool (2006-16) suggests that by 2016 'Lancashire's countryside – one of the area's strongest assets – will have developed its potential through sensitive and sustainable development.' The Forest of Bowland AONB's work has become increasingly integrated and influential with LBTB and the two staff teams regularly work closely.

In the Yorkshire and Humber region, Welcome to Yorkshire acts as a regional tourist board, and co-ordinates the work of six tourism partnerships including the Yorkshire Dales and Harrogate Tourism Partnership which covers Craven district, in addition to Harrogate, Richmondshire and parts of South Lakeland and Eden districts. Welcome to Yorkshire is currently⁹ drawing up a sustainability delivery plan which will provide a framework for activity in the region. The Visitor Economy Strategy for 2008 aims for an annual growth of 5% in the visitor economy in the region over the next five years, based on quality and sustainable growth. Developing sustainability is seen as an integral part of this growth.

The Yorkshire Dales and Harrogate Tourism Partnership Action Plan 2006-10 has several objectives of which one is to 'raise the profile of tourism as an economic driver whilst valuing the unique environment and the quality of life of local people'.

Rural development

Natural England was created in 2006 as a restructure of English Nature, the Rural Development Service and the Countryside Agency. As a major funding partner of the Forest of Bowland AONB, Natural England continues to be an important partner in much of our work, and although sustainable tourism is not a priority for the new agency, many of their objectives fit those of the AONB Management Plan:

- A healthy natural environment
- People are inspired to value and enhance the natural environment
- The use and management of the natural environment is more sustainable

Much has changed since 2004 in the field of Rural Development in Lancashire and nationally. The well established Lancashire Rural Recovery Plan ceased to exist in 2008, and since then there has been little specific rural funding available in the county until the recent arrival of the

Rural Development Programme for England (RDPE) and the new Leader structure to disperse Axis III monies.

The Forest of Bowland AONB is involved in four Leader Local Action Groups; Pennine Lancashire in the south, the Yorkshire Dales to the east, North Lancashire to the north, and West Lancashire to the south-west.

Economic and social issues

The majority of the population of the Forest of Bowland AONB, estimated at 16,000, live within settlements on the edge of the protected area while the upland core is sparsely populated. Once the population of the 2km buffer is added, total population reaches 73,500.

A key challenge for sustainable tourism in the Forest of Bowland AONB is to ensure that sustainable use of the countryside for recreation and access is considered as an integral part of good land management, and that tourism is accepted as an important contributor to the rural economy.

Farming and game management dominate the land use of the Forest of Bowland AONB. Much of the area is influenced by the management of a small number of estates: extensive areas of moorland are managed for grouse shooting; and slightly more than half of all farmland is under tenancy. Agriculture is still a significant employer within the Forest of Bowland AONB. Many of the most successful and sustainable tourism operators are people who have diversified from farming, or who have given it up completely and see tourism as a way of remaining within the rural community.

There are few reported difficulties in recruiting labour for the tourism industry. In some cases this is due to the remoteness and sparse population in parts of the Forest of Bowland AONB. In others, it may be due to the relative attractiveness of other forms of employment; the Ribble Valley District in particular has a high level of general economic performance, boosted by significant numbers commuting out of the area to work. As the majority of tourism businesses, 80% in 2009, employ just under five full time and five part time staff, recruiting staff is not a cause for concern as most employees are drawn from within a circle of family and friends.

There is generally a positive response to tourism from the local community. It is recognised by many people, and the majority of parish councils in a recent survey¹⁰, that tourism provides an important source of income to the area, and supports rural services, especially shops and pubs. Indeed Laund Booth Parish Council states that 'tourism is the future and lifeline of every village'. Businesses see little conflict between their activity and that of the wider community, with 81% in the 2009 survey seeing no problems. However, whilst acknowledging the benefits, tourism is still viewed by some locals as a cause of traffic congestion, parking problems and littering.

Key socio-economic issues which are pertinent to the visitor economy and raised in the Forest of Bowland AONB Management Plan for 2004-9 were:

- Potential impact of recent economic downturn on the rural economy
- Increasing competition with other countryside destinations and need to retain high percentage of tourism market share
- Development, traffic and lighting beyond the boundary of the Forest of Bowland AONB increasingly intruding on the quality of the landscape
- Pressure for new development and building conversion in open, exposed landscape, which can be visually intrusive
- Small-scale cumulative development, e.g. building extensions, residential boundary treatment, roadside concrete curbing and signage, resulting in erosion of integrity and quality

¹⁰ August 2009

- Pressure for commercial-scale renewable energy infrastructure, such as wind farms, and potential cumulative effects of many domestic/community small developments resulting in changes to the character of the area
- Lack of public transport and reliance on the private car
- Loss of services in rural settlements due to economies of scale, changes in Government policy and funding to public services, and changing purchasing habits leading to reduction in rural sustainability and negative impacts on those without a car
- Limited access to full time jobs locally
- Lack of affordable housing for people working in the Forest of Bowland AONB
- Lack of opportunities for rural businesses to capitalise on using Information Technology (IT), including inconsistent broadband internet coverage

It is interesting to note that many, if not all of these issues were also raised in the Management Plan consultation in 2008, and by groups discussing the formulation of this Strategy in 2009.

Natural resources

The natural environment of the Forest of Bowland AONB is its greatest asset for visitors. Visitors most often cited 'scenery and landscape' as the thing that they particularly liked about the Forest of Bowland AONB; interest was also expressed in there being more places to find out about or experience the area's wildlife and natural heritage.

In 2006 the Visitor Survey results demonstrated that only 64% of visitors were aware that the Forest of Bowland AONB was a designated protected area. In 2008 however, there was a marked increase to 94%, and 88% in 2009. This increased awareness coincides with the increase in the area's profile, the marketing carried out via partners such as LBTB, and in the number of businesses who now market themselves as being part of the Forest of Bowland AONB. See Appendix 5 for more details.

The AONB is working with many partners, including the Royal Society for the Protection of Birds (RSPB) and Natural England to protect and enhance its nationally renowned landscape and internationally important wildlife interest. The Bowland Fells is one of only two small areas in England where hen harriers, one of our most spectacular birds of prey, have bred regularly in recent years, and there is a very real danger that without intervention it will be lost as a breeding bird in England. English Nature, now Natural England, launched the Hen Harrier Recovery Project to monitor the remaining breeding birds, assess the factors responsible for the recent decline and help begin the process of restoring its fortunes.

The RSPB in Bowland, as well as undertaking monitoring and recording of breeding hen harriers and wading birds, launched an events programme in 2003. Guided walks are scheduled throughout the year, led by experts from RSPB, United Utilities and English Nature, including Winter Safaris to view wading birds and Moorland Safaris, that aim to give people a rare glimpse of the enigmatic hen harriers.

In 2008 and 2009 LCC Countryside Service, the RSPB, United Utilities and Natural England worked together to run a hen harrier web cam project. Video footage of a hen harrier nest on the fells was shown at the Bowland Visitor Centre at Beacon Fell where a group of trained volunteers offered commentary and explanation to visitors. This was a very successful initiative, with hundreds of visitors getting the chance to see hen harriers hatch, feed and fledge. A web site and blog provided details to those unable to visit.

United Utilities (UU) has significant landholdings within the Forest of Bowland AONB with Stocks Reservoir being the most important for wildfowl. UU sponsor two RSPB wardens to monitor biodiversity as part of the Birds of Bowland Project. From 2004-09 UU, in partnership with RSPB, and with funding from OFWAT, carried out a Sustainable Catchment Management Plan (SCaMP) on their Bowland Estate bringing large areas of land into improved management, including woodland creation and peatland restoration, and benefiting wildlife and habitats.

Festival Bowland is a 'year-round' calendar of events that celebrate the birds, wildlife, landscape and culture of the Forest of Bowland AONB. Festival Bowland events allow us to showcase the area's special qualities and share with others what makes it such a special place for people and wildlife. Led by local experts, landowners and businesses, this replaces the 'Bowland Festival' that traditionally took place in June and provides a wealth of events and opportunities for people to explore the area's special qualities throughout the year. This shift from a fortnight event in June to a year-round calendar of events was taken when evaluation of the Bowland Festival showed that many people attending were repeat visitors from the local or nearby areas. In addition, there was no evidence that the Bowland Festival, whilst popular and well attended, generated a significant increase in staying visitors.

Beacon Fell Country Park is managed by the LCC and provides a centre for environmental education for Lancashire, and through its Countryside Stewardship scheme demonstrates best practice in the management of many features of the Forest of Bowland AONB landscape, including regenerating moorland, rebuilding dry stone walls and managing pasture and hay meadow for birds, wildflowers and invertebrates. Interpretation panels and a network of signed and waymarked footpaths and Tramper Trails enable exploration and understanding of this work. Bowland Visitor Centre at Beacon Fell was recently awarded a GTBS Gold award to recognise its high standards of environmental management. Beacon Fell Country Park receives in excess of 90,000 visitors a year, and is the ideal 'gateway' to the Forest of Bowland AONB.

Two Lancashire Countryside Officers are dedicated almost entirely to the Forest of Bowland AONB, and a third covers a significant area alongside duties elsewhere. Their work has increasingly been integrated to that of the AONB Unit and their contribution to work with farmers diversifying into tourism, access and recreation, and community projects has been invaluable to the delivery of sustainable tourism in the Forest of Bowland AONB to date.

Wyre Coast and Countryside Service work in partnership with the Forest of Bowland AONB to include a number of environmental events within the protected area in their year round programme. Their annual Walking Festival in early June attracted 721 visitors in 2009, with 29 events taking place within the Forest of Bowland AONB, attracting 393 of these participants.

Cultural and heritage resources

The Forest of Bowland AONB has a rich cultural and historic heritage, evident in its individual buildings, landscape features, such as walls and barns, and small sites scattered throughout the area. Visitors have expressed interest in opportunities that discover the cultural and historic heritage of the area.

There are many villages in the Forest of Bowland AONB that are particularly attractive, with their well kept stone buildings and other strong features such as churches, and bridges over rivers. Many visitors cite attractive villages and towns as one of the things they particularly like about the area. Historic houses are associated with the estates of Bowland, but some are not open to the public without prior arrangement or for occasional special events. Clitheroe Castle and Museum were extensively refurbished and re-opened in Spring 2009.

The Forest of Bowland AONB has been involved with a range of activities designed to record and enhance important features. These include:

- *Traditional Boundaries Project*, including coppicing and laying old hedges, restoring dry stone walls and planting new hedges to restore traditional field boundaries;
- *Landscape Stories Project*, a Heritage Lottery funded project, running for two years from April 2009, working with four community heritage projects in Pendle, Slaidburn and Chipping. This project aims to study the impact that human activity has had on the local landscape and interpret the 'stories' for visitors and local people.
- *Community project and volunteering opportunities* have developed in the Forest of Bowland AONB with the appointment of a Community Projects Officer in 2006. This officer works closely with community groups and employee volunteers wanting to improve the local environment – both

natural and historical – and runs a range of volunteering opportunities offering traditional skills and wildlife surveying.

Tourism facilities and services

Accommodation, eateries and attractions

It is estimated that there are approximately 200 accredited accommodation establishments in and around the Forest of Bowland AONB. Of these, there are 94 serviced providers, 95 self-catering and 26 camping/bunk barn accommodation. Some providers provide more than one type of accommodation. See Appendix 7 map 1.

There are a number of high quality places to stay, including a handful that are well known and recognised, such as Gibbon Bridge Hotel, and the Inn at Whitewell. Over recent years, there has also been an expansion of high quality self-catering accommodation, many being on farms, and the majority of operators now have their own websites.

In addition to accommodation providers which also offer food, there are 84 identified places to eat out that are mostly pubs and cafes. See Appendix 7 map 2.

There are 39 visitor attractions in the Forest of Bowland AONB, see also Appendix 7 map 2. These attractions are largely small and often seasonal. Other than Beacon Fell Country Park, which estimates 90,000 visitors a year, only Bowland Wild Boar Park in Chipping (70,000) and Clitheroe Castle Museum record visitor figures that exceed 10,000 p.a.

Many attractions are based around retail outlets, such as garden centres. Access is provided to some private properties of particular interest through limited openings or occasional events. Heritage attractions, such as Sawley Abbey, Whalley Abbey, Slaidburn and Pendle Heritage Centres, often rely on volunteers.

The tourism sector in the Forest of Bowland AONB is dominated by small businesses:

- 82% of respondents to our survey in 2009 employ 1-5 full or part time staff
- 12% employ 6-10 full time staff
- 5% are substantial businesses employing 20+ full or part time staff

Characteristically, many of the larger businesses that employ over 20 people are serviced accommodation offering food and drink, but they also include some visitor attractions and group accommodation providers.

Businesses in Bowland seem to be performing well. Figures from the 2009 Business Enterprise Survey revealed that 61% had an annual turnover of up to £50,000, 13% between £51,000 and £100,000, 13% between £100,000 and £200,000, and 13% over £200,000.

76% stated that their business was operating better in 2009 than 2008, compared to 57% stating this between 2007 and 2008. Of those 35% stated they had seen an increase in operation of between 1 and 10%, 35% saw an increase of between 11 and 30%, and 10% had seen a 50% improvement. Surprisingly in the current climate, just 24% stated that their business was operating worse than last year, and much of this was a small decline, 5% had seen a decrease of between -1 and -20% and a further 5% between -21 and -40%. For more details see Appendix 5.

There has been recent expansion in the self-catering sector, including some high quality accommodation. Of the 96 members of the Sustainable Tourism Network, 28 have been in business for less than three years¹¹. New entrants to the self catering market do not seem to have difficulties filling their capacity, however an increase in the supply of serviced short stay

¹¹ September 2009

accommodation would help to meet reported demand, especially along long distance routes which partners are attempting to promote in the area such as the Ribble Way, the North Lancashire Bridleway and the Way of the Roses cycle route.

The Forest of Bowland AONB is encircled by several caravan sites, some of which include facilities for campers. Some of these sites hold David Bellamy Gold Conservation Awards, and two now hold GTBS accreditation. There is a continued demand for camp sites, with existing providers reporting early bookings and having to turn away custom, particularly at Bank Holiday weekends. A number of Caravan Club certified location (CL) sites are appearing at farms, these provide pitches for up to five caravans.

There is one Youth Hostel in the Forest of Bowland AONB, at Slaidburn. Three camping barns also serve the area, under the YHA umbrella; plus independent hostels at Dalesbridge near Austwick, and Dale Head Barn in Gisburn Forest. Group accommodation is also available at Waddow Hall Activity Centre, Stephen Park and Smelt Mill Bowland Pennine Mountain Rescue Centre in the Trough of Bowland.

The Forest of Bowland AONB, in line with LBTB and District Council policies, only works with and promotes graded accommodation. There has been a marked rise in the quality of graded establishments. In 2004 three star and diamond ratings were the most common, followed by four star and diamond with only a handful of five star or diamond ratings. In 2009 the number of five star establishments has risen to 18 with 97 reaching four star, 39 at three star and only five two star.

Locally derived produce: gastronomy, art and design

Visitors can relate to the landscape and scenery of the Forest of Bowland AONB in a number of ways, as well as simply enjoying it as a backdrop to their activities, whether passive or active.

Local foods

Landscape reflects land use, and in the Forest of Bowland AONB, agriculture remains an important part of the rural economy. The area is best known for its meat, game and dairy produce. Purchases of local produce enable visitors to support the local rural economy, and in turn invest in the landscape that they come to enjoy.

Since 2004 the Forest of Bowland AONB has supported local produce in a number of ways, see Appendix I, including creating and maintaining an online database of producers and by encouraging retail and food establishments to 'buy local'. There is also an increasing national interest in quality local and seasonal produce and many pubs and restaurants reflect this, notably the Ribble Valley Inns.

The Ribble Valley Food Trail, launched in 2008 features a number of local producers based in the valley who together form a developing visitor attraction. Similarly the three Lancashire Cheese Trails celebrate artisan cheese makers and countryside walks within and near to the Forest of Bowland AONB.

There are growing opportunities to buy and taste local produce locally. Bashall Barn, located in Bashall Town just outside Clitheroe, is a retail and restaurant outlet based in an on-farm barn conversion, selling local produce including speciality bacon and sausages, cheese, pickles, preserves, sauces, and ice-creams. On the same site is Bowland Brewery, a micro brewery established in 2003. Other outlets include Little Town Dairy who produce and sell yoghurt and other home made produce such as cakes, jams, chutneys, fruit, vegetables and meat. A new Longridge Food and Drink Festival was launched in 2009 showcasing a large number of Bowland producers, and was supported by the Forest of Bowland AONB through its Sustainable Development Fund. The Bowland and Garstang Banquet, which has now been running successfully for

a few years, showcases the very best in local produce and exceptional dining experiences that can be found across the Garstang area.

Although farmers' markets are well established, they tend to be located in centres of population around the fringes of the Forest of Bowland AONB, or at popular tourist spots in the Yorkshire Dales. Colne, Fence, Samlesbury, Settle, Bentham and Skipton have regular farmers' markets¹² although many local markets at places including Garstang, Clitheroe and Preston stock good quality local produce.

Taste Lancashire accreditation scheme for food establishments was developed by Made in Lancashire and Lancashire and Blackpool Tourist Board. Pubs, cafes, tea rooms and restaurants are graded as Quality and Highest Quality, and over 20 establishments in the Forest of Bowland AONB area now meet these standards.

The 2009 Visitor Survey found that 80% of respondents rated the food in the area as either good or excellent with the highest amount of visitor spend being on food category in cafes, restaurants and pubs. 36% of visitors spent between £6 and £15 on food and drink in a pub, café or restaurant, and 45% spent £1-15 on take out food.

Art, craft and design

The landscape of the Forest of Bowland AONB has long been a source of artistic inspiration, and the Lune Valley is known to have inspired work by Wordsworth and J.M. Turner. Working artists and craftsmen are still drawn to the area today, and there are a number of opportunities to view and purchase local work at places such as Bentham Pottery, the Platform Gallery, Clitheroe, Backridge Farm, Maiden Bridge, Higherford Mill, and Brabins Gallery in Chipping.

Every year in June or July, the Lunesdale Studio Trail opens the doors of nearly 20 artists' studios, two thirds of which are in the Forest of Bowland AONB, to visitors for two weeks. The work is varied and comprises paintings, prints, sculptures, ceramics, watercolours, and drawings; and woven, felted and embroidered textile art.

In 2008 the first Arts Festival was run in conjunction with the Bowland Festival, and in 2009 it became a stand alone event – Bowland Festival Arts. Co-ordinated by Green Close Studios and funded by the Arts Council and the Forest of Bowland AONB Sustainable Development Fund, over 20 events combine with exhibitions focused on work by local artists inspired by the Bowland landscape.

Plants and gardens

Plants and small gardens are very much in evidence in the well kept villages of Bowland, and there are several opportunities to visit gardens and plant centres in and around the Forest of Bowland AONB. The village of Waddington is known for its Coronation Gardens. There are permanent garden centres, such as Holden Clough Nursery, Gardenmakers at Wigglesworth and the Barn at Scorton, and gardens open to view such as Cobble Hey gardens. There are also special events such as the garden, plant, craft and produce fair at Browsholme Hall, the annual Flower Festival at Stonyhurst College and an annual event at Bleasdale Towers.

Recreational facilities

In 2006 the visitor survey suggested that, after 'enjoying the countryside to relax or picnic', the second most frequent purpose of visiting the Forest of Bowland AONB is 'to go for a walk'.

An extensive network of footpaths and bridleways traverse much of the area, see Appendix 7 map 3. Rights of way are largely absent from the central upland fells, however, access to open

¹² 2009 information

country was extended under the CRoW Act 2000, with large parts of the moors and heathland of the Forest of Bowland AONB becoming accessible for recreation on foot for the first time.

There are a number of long distance walking trails. The Ribble Way follows the river for 112km, 70 miles, from its source high in the fells of the Yorkshire Dales to the sea near Preston, with about half of the route running through the Forest of Bowland AONB. The Wyre Way similarly traces the River Wyre from source to sea, and the Heart of the Kingdom walk provides a challenge walk around the Bowland Fells and Pendle.

Over the last four years an increasing number of local routes have been promoted on the Forest of Bowland AONB website as 'download walks'. These feature a simple map, directions, GPS co-ordinates and information on facilities such as bus routes, cafes and toilets. These walks are one of the most frequently visited pages on the Forest of Bowland AONB website, with monthly visits to the walking section varying between 1,500 and 1,900 page views.

The Forest of Bowland AONB incorporates sections of the Lancashire Cycle Way and the National Cycle Network. A series of on and off-road cycle routes offer cyclists a combined route network of over 160 km, 100 miles. The popular 'Bowland by Bike' leaflet was redesigned in 2008 to illustrate six routes, these along with another four are also available as 'download rides' on the Forest of Bowland AONB website. Cycling is an increasingly popular activity in Bowland, with two new cycle hire operators setting up in the last four years. The proposed 'Way of the Roses' coast to coast route will cross the northern borders of the protected area and hopefully bring yet more interest into the area when it opens in Summer 2010.

The Yorkshire Dales Cycle Way skirts the Forest of Bowland AONB on its northern edge. There are also plans to link Settle, a developing focus for cycle tourism, with Gisburn Forest via a link between the North Lancashire Bridleway and the Pennine Bridleway, both of which are open to cyclists, and walkers.

The first 45km, 28 miles, of the North Lancashire Bridleway opened in June 2004, the first section of a proposed circular route. Additional sections in Wyresdale and Bleasdale were added in 2007/08, and careful research and negotiation has prepared the way to extend this network in future, and complete the loop back to Lancaster. Once this is completed and accommodation stock and livery are identified, the hope is that this will be a major attraction to walkers and horse riders.

Gisburn Forest, a Forestry Commission plantation, provides a significant recreational resource for walkers, cyclists and horse riders within the Forest of Bowland AONB. Mountain biking in particular is very popular and major plans to re develop the trail routes were drawn up in 2008. These mountain bike trails officially open in 2010, offering a variety of family, downhill and advanced black routes, significantly improving the offer, which is expected to bring an increase in visitor numbers in the area.

Tramper Trails, routes which are suitable for people using a Trampler vehicle, a 4 wheel drive mobility scooter, have been developed by the Countryside Service, in conjunction with the bridleway extension around Scorton, Wyresdale and Landskill. These routes are promoted by the Forest of Bowland AONB, and a consortium of local tourism operators who provide and maintain a vehicle, for people with walking difficulties to use free of charge. See Appendix 7 map 3, and Appendix 4 case study 2 for more details.

Stretches of watercourse have private and public rights for fishing, and fishing facilities are offered at Stocks Reservoir and a number of other open water and fishery establishments. A small number of hotels offer to arrange fishing for guests. For more details see the leaflet 'Fishing in Bowland'.

Lancashire County Council manage a number of major car park and picnic sites in and close to the Forest of Bowland AONB: Springwood near Whalley; the Crook of Lune, including a cycleway to Lancaster along the disused railway; the former gravel workings at Scorton; and at Bull Beck in the Lune Valley. Other heavily visited sites include moorland and hilltop viewpoints like Harrisend Fell, Nicky Nook, Jeffery Hill on Longridge Fell, the Nick of Pendle and the famous moorland route through the Trough of Bowland. Detailed information of all LCC countryside recreational opportunities can be found at <http://www.lancashire.gov.uk/environment/countryside/>. LCC operates a full-time and volunteer ranger service in the Forest of Bowland AONB, focussing primarily on access and visitor management in the tourist honeypot sites and access land areas.

Accessibility and transport

The Forest of Bowland AONB is easily accessible by road, being bounded by the M6 to the west, the M65 to the south, the A59 to the east and the A65 to the west. Large volumes of holiday traffic pass by, especially on the way north to the Lake District and Scotland; the Forest of Bowland AONB is well placed to provide an overnight stopover.

There is a relatively good rail network around the edge of the Forest of Bowland AONB. Preston and Lancaster are served by the main west coast services, and Clitheroe is served by a branch line from Blackburn which links it to Preston and Manchester. The well known Settle to Carlisle line passes to the north of the Forest of Bowland AONB, with the Leeds to Lancaster/Morecambe line skirting the northern edge, with stops at Giggleswick, Clapham, Bentham and Wennington. Ribble Valley Rail campaigned for the re-introduction of the Lancashire Dales Rail service to join the Leeds to Carlisle line at Hellifield, currently running on Summer Sundays.

Bus services are concentrated in the Pendle, Ribble and Hodder Valley areas, and in the Lune Valley too. Since 2004 the Bowland Transit bus service has gone through a few reincarnations, and now offers a regular hourly service between Clitheroe and Slaidburn running alternatively clockwise and anti clockwise, linking to trains at Clitheroe, and to the Settle shuttle bus at Slaidburn. It is also possible to link with the Pendle bus service at Clitheroe which travels to Nelson via Barley and Newchurch on weekdays, and to Burnley using a circular route including Sabden on summer Sundays as the Pendle Witchopper service.

An increasing number of Forest of Bowland AONB publications feature bus service information, in line with the recommendations of the Sustainable Transport for Tourism study carried out in 2007.

Information services

Tourist Information Centres (TICs) at Clitheroe, Lancaster, Garstang, and Preston are controlled by individual local authorities. There is a TIC in Pendle Heritage Centre and new centres have been opened at Nelson, Lancaster and Clitheroe since 2004. In North Yorkshire, Settle has a networked TIC and Bentham has a Tourist Information Point manned by volunteers during the summer. Bowland Visitor Centre at Beacon Fell Country Park offers visitor information without operating formally as a TIC.

Since 2004 there has been a significant increase in the amount of information provided by the AONB Unit itself. A new Forest of Bowland AONB website www.forestofbowland.com was launched in 2009 providing a wealth of visitor information including: accommodation, attractions, self guided walks, events and a local products database as well as information about the area in general.

A large number of new interpretation leaflets have been produced, see supporting documents or the website, and these are distributed on demand free of charge. Familiarisation visits have been organised for TIC staff and businesses to introduce them to Bowland and tell them more about the opportunities for sustainable tourism in the Forest of Bowland AONB. Additionally,

bedroom browsers and locally produced wooden leaflet racks made available to businesses in the Network have ensured that the Forest of Bowland branded leaflets are presented effectively.

Lancashire and Blackpool Tourist Board promote the Forest of Bowland AONB widely, and only recently ended a major campaign entitled 'Country Escapes' which had the Forest of Bowland as its 'theme champion'. Several major publications, e-blasts, press familiarisation visits and web information sections featured the Forest of Bowland AONB and undoubtedly contributed to the increased profile of the area amongst visitors. For more details see Appendix 4 case study 5.

Tourism performance

Fragmentation of administrative areas in the Forest of Bowland AONB makes it very difficult to isolate meaningful volume, value and performance data for the AONB. However, since 2004 the AONB Unit has commissioned data from the Scarborough Tourism Economic Activity Monitor (STEAM) as the recognised standard in the UK tourism industry, and this estimates a total of over 4.25 million visitors a year to the Forest of Bowland AONB and the 2km 'buffer zone'.

We have been able to make the following analysis of comparable data across the four years 2004-2007.

Tourism Growth 2004-2007				
	2004	2005	2006	2007
Tourist Days (000s)	8,781	8,781	8,677	9,113
<i>index</i>	100	100%	99%	104%
Tourist Numbers (000s)	4,258	4,258	4,172	4,270
<i>index</i>	100	100%	98%	100%
Revenue £m	£440	£445	£437	£465
<i>index</i>	100	101%	99%	106%

This shows a recovery of tourism in the Forest of Bowland AONB in 2007 after a flat or even slightly falling market. The development and promotion of Sustainable Tourism from 2006 may have played a part in this growth.

Using the same annual STEAM data where this is available allows us to compare the Forest of Bowland AONB performance with other areas. The analyses below show the Forest of Bowland AONB compared with the Lancashire and Blackpool Tourist Board sub-region and the Yorkshire Dales National Park, which adjoins the AONB on its north east border. We have the model's findings for 2005, 2006 and 2007 for each of the three areas.

This comparison seems to show that 2007 gave the Forest of Bowland AONB better growth than its neighbours in Tourist Days, Numbers and Revenue. In particular, the Forest of Bowland AONB did much better than the Yorkshire Dales, which had had a very strong 2006 but fell back in 2007. Again, 2007 can be said to be the year when Sustainable Tourism began to make a mark in the Forest of Bowland AONB.

Tourist numbers index (2005=100)		
	2006	2007
Forest of Bowland AONB	98	100
Lancs & Blackpool	97	98
Yorks Dales	103	100
Tourist days index (2005=100)		
	2006	2007
Forest of Bowland AONB	99	103
Lancs & Blackpool	98	101
Yorks Dales	104	100

Revenue* % change year/on/year		
	2006	2007
Forest of Bowland AONB	98	106
Lancs & Blackpool	100	103
Yorks Dales	103	96

* at constant prices

Analysis has also been made by different types of staying visitor – in Serviced and Non-Serviced Accommodation. There are almost the same number of tourists in each type of accommodation, but a slight bias in favour of those using Serviced Accommodation. The time series shows slightly more tourists are spending slightly less time, less than 2 days, in Serviced Accommodation, whilst the number of visitors in Non-Serviced has remained the same over the period, but they are staying for more days, 6.59 in 2007. This might suggest that more people are making more time to stay and explore and enjoy the Forest of Bowland AONB.

Serviced Accommodation					
	2004	2005	2006	2007	2007vs2004
Days (000s)	1,473	1,398	1,430	1,508	102.4%
Numbers (000s)	750	687	741	779	103.9%
Non-Serviced Accommodation					
	2004	2005	2006	2007	2007vs2004
Days (000s)	4,141	4,446	4,373	4,677	112.9%
Numbers (000s)	708	772	698	710	100.3%

The data suggests that there has been almost no change in the number of Day Visitors. Whilst this is disappointing, in one sense it might suggest that the Forest of Bowland AONB already has a very high penetration and repeat usage by those within day-trip distance. 2007 is remembered as a very poor summer for wet and cold weather, 2008 was possibly even worse! This may affect the 'casual' Day Visitor market disproportionately.

Day Visitors					
	2004	2005	2006	2007	2007vs2004
Days (000s)	2,674	2,631	2,697	2,680	100.2%
Vehicle Numbers (000s)	648	639	657	650	100.3%

The STEAM model shows the amount of vehicle use, excluding the vehicles used by "local" traffic. This is estimated for each type of accommodation. This seems to indicate that whilst the traffic has grown in line with the numbers, so has the number of cars. In fact, if anything, the number of people per car has fallen. These figures exclude the figures for 'staying with friends or relatives (SFR)'. The numbers in this category are small in relation to the whole, being about 100,000 people each year, accounting for about 30,000 vehicles.

Total vehicle use (ex SFR)						
		2004	2005	2006	2007	2007 vs 2004
Serviced	Vehicle Days (000s)	499	474	489	515	103.2%
	Vehicle Numbers (000s)	256	236	257	270	105.5%
	Ave/vehicle	2.93	2.91	2.88	2.89	98.5%
Non-Serviced	Vehicle Days (000s)	1,037	1,12	1,103	1,181	113.9%
	Vehicle Numbers (000s)	177	195	176	180	101.7%
	Ave/vehicle	3.99	3.97	3.96	3.96	99.2%
Day Visitors	Vehicle Numbers (000s)	648	639	657	650	100.3%
	Ave/vehicle	4.13	4.12	4.11	4.12	99.9%
Total Visitors	Days (000s)	8,288	8,475	8,500	8,865	107.0%
	Vehicle Days (000s)	2,180	2,230	2,250	2,350	107.4%
	Ave/vehicle	3.79	3.80	3.78	3.78	99.6%

In summary, the STEAM model appears to show that 2007 saw the Forest of Bowland AONB doing better than its neighbours and increasing the number of people who spent more time in the AONB area. Private car usage by visitors continued to grow.

Current visitor patterns

One million people live within a 30 minute journey of the Forest of Bowland AONB, and the area is a popular visitor destination for the surrounding Lancashire urban settlements. Its relatively undiscovered character appeals to the visitors who value the area so highly, and loyalty to the area is strong with a high level of repeat visits.

The visitor survey work carried out on behalf of the Forest of Bowland AONB in 2004 by the Tourism Company as part of the original strategy development, in 2006 by private consultants, and in 2008 and 2009 by AONB Unit staff and graduate placements, has made a small but important contribution to understanding the needs and aspirations of visitors. In all cases visitors were questioned at a number of honeypot sites throughout the Forest of Bowland AONB, and enterprises were interviewed about their business performance, and about their perception of their visitors.

Current visitors to the Forest of Bowland AONB are fairly passive in their enjoyment of the area. When asked about the activities of their visitors while in the Forest of Bowland AONB in 2009, enterprises suggested that 'general sight seeing' was the most common, followed by 'visiting our business in particular' and 'visiting friends and family'. These were followed by walking and visiting the Forest of Bowland AONB as a destination.

Similar results emerged from the 2009 Visitor survey which found that general sightseeing was the most common reason for visiting, followed by walking, visiting Bowland as a destination, cycling and visiting friends and family.

Day visitors in particular are loyal to the area: in the site surveys in 2009 only 6% of visitors were on their first visit to the Forest of Bowland AONB, and 46% described themselves as regular visitors. However, staying visitors do appear to be discovering the area for the first time: 48% of parties were on their first visit to the Forest of Bowland AONB in 2008, and a further 11% were staying overnight for the first time having occasionally visited the area before. Only 22% of staying visitors described themselves as regular visitors, offering good prospects for the growth of staying tourism. In 2009 the visitor survey revealed that 21% were regular visitors from outside the area, 29% had visited before but were not regular visitors and 25% visit a few times a year.

The 2009 Visitor Survey found that 5% of visitors stayed for 8 or more nights, 24% for between 5 and 7 nights (down from 40% in 2008), 66% between 2 and 4 nights (up from 36% in 2008) and just 5% for one night. This is a promising trend, showing people are tending to stay for more short breaks and fewer single overnight stays.

The major conurbations of Liverpool, Manchester and Leeds are within a 90-minute journey of the Forest of Bowland AONB, offering a potential market for short breaks. The majority of respondents in 2009 were from Lancashire, not surprisingly as the majority were day visitors, with Cheshire and Yorkshire coming next, followed by a variety of places including Derbyshire, Merseyside and Scotland. The Enterprise survey for 2009, which included accommodation providers, suggested that visitors regularly come from elsewhere in the UK, and 92% estimated that up to 25% come from overseas.

The average party size for day visitors in 2008 was three, slightly less for staying visitors at 2.5. This is born out by the enterprise survey, which suggested that about half of all visits, day and overnight, were made by couples.

All surveys suggest a high dependence on the 45+ market. For staying visitors the profile may be even older: our surveys found that almost half of staying visitors were over 55.

All visitors seem drawn to a small number of sites, our 'honeypots'. The surveys showed the places most frequently visited in the Forest of Bowland AONB to be:

- Trough of Bowland
- Dunsop Bridge
- Slaidburn
- Pendle Hill
- Gisburn Forest/Stocks Reservoir
- Beacon Fell
- Edisford Bridge.

There is a high degree of visitor satisfaction with local facilities and services in the Forest of Bowland AONB which mirrors the findings of 2008 and before. A high percentage of visitors rated the following as either excellent or good:

- food 79%
- visitor information 71%
- picnic sites 59%
- car parks 72%
- way marked paths and trails 74%

Children's play areas and public transport were the least used facilities and services.

For more details of all these surveys please see Appendix 5.

Market interest

Tourism enterprises in the Forest of Bowland AONB suggest the group and age profile of their visitors to be as follows:

- There is a high dependence on the 45+ market, and slightly less but still high dependence on the 65+ market
- Families are thought to make up about one quarter of the market and are important for some businesses. Young couples make up a relatively small proportion of visitors
- There is dependence on the day visit market, especially for the largest enterprises employing more than 10 people
- Even within the self-catering sector, the short breaks market is important: in 2009 44% of visitors stayed between 4 and 7 nights, 38% in 2008; 39% stayed between 2 and 4 nights, 38% in 2008; and 17% stayed for only for one night compared to 22% in 2008.
- The majority of visitors are attracted from within 100 miles. For larger businesses, the dependence on local visits is greater. Overall, visits include about 5% from overseas.
- Customer loyalty is very evident: in 2009 32% of enterprises believed that a high number of their customers are regular or frequent visitors to the area
- New visitors are also being attracted to the Forest of Bowland AONB: in 2009 43% of enterprises believed that a high number of their customers are thought to be visiting the area for the first time.

There is evidence that UK residents who holiday in England have a very positive attitude towards sustainable tourism. Recent surveys show the following results:

Welcome Yorkshire – survey of 1197 people in December 2008:

- 65% of visitors are willing to pay for a service which is environmentally accredited
- 63% would look to use public transport due to environmental impact
- 59% would pay extra for an environmental pay-back scheme

According to a 2007 Trip Advisor Survey 9% of consumers specifically seek out environmentally friendly accommodation.

Future Target markets

For the future, the following segments are identified for consideration:

Day visitors

The day visitor market cannot be ignored, particularly in the southern and western parts of the Forest of Bowland AONB. We have detected a great fondness for the Forest of Bowland AONB amongst its loyal following, who view it as part and parcel of their lives and their territory. There are opportunities to build on developing niche markets in activity tourism, especially mountain biking and geocaching; and special interests such as wildlife, birdwatching and heritage .

Short Breaks

The trend towards short breaks will continue, and will provide the main opportunity for growth in general non-specialist tourism. Encouraging mid-week visits for those with more flexible commitments will be important, together with attracting out of season visits perhaps based around birdwatching or long distance walking or riding routes. There appears to be some scope to persuade current day visitors to add value to their visit by staying overnight.

General holidaymakers

The location of the Forest of Bowland AONB lends itself well to incorporation in a wider holiday offer, by combining its product with that of the nearby National Parks (Yorkshire Dales, Lake District); the Lancashire coast (Morecambe Bay, Blackpool); or nearby industrial heritage or city attractions. Longer stays are already attracted to the Forest of Bowland AONB based on this wider offer, and there may be scope to increase this. Conversely, holidaymakers based elsewhere, for example the high class hotels in Morecambe or Blackpool, can be attracted to make day visits into the Forest of Bowland AONB. This

may be the first step in cross-marketing, encouraging a longer return visit based in the Forest of Bowland AONB.

Walkers

The indications are that this market will remain strong in the coming years as visitors look for holidays that are an escape from day to day life, and as part of a healthy lifestyle. There may also be scope to base more holidays on longer promoted routes, offering accommodation as overnight stays along a 2 or 3 day walk. The greater market however lies in walking as an activity while on holiday, and the many and varied walks that the Forest of Bowland AONB has to offer could add greatly to the experience of visitors of all ages and abilities.

Activity based holidays

This market segment has grown significantly in recent years. Investment in cycling routes, and the North Lancashire Bridleway in horse riding, has created new opportunities for these smaller and more specialist markets. Currently the proportion of total visitors to the area who come for specific activities is low, but there is significant scope for growth.

Wildlife enthusiasts

Wildlife and natural tourism, visits to natural wildlife habitats or watching wildlife, represents an important opportunity for the Forest of Bowland AONB and offers particular scope for off-season visits. Bird watching is the primary activity of this market, which lends itself well to Bowland. However, caution must be exercised about the size of the market and the potential of the existing product to generate new and staying visits.

Field sports, including angling

This is a relatively high value market, both in terms of individuals with a special interest and also the incentive component. Whilst this is an important market to the Forest of Bowland AONB, capacity is limited, but growing. It is well organised for the most part, and there may be scope to develop clusters or joint promotions.

Health & Well-being

There is a growing interest in holidays where relaxation and health are the focus as well as a rising interest in 'well-being'. This reflects a growing trend of involvement in fitness activities and increasing interest in more 'alternative' lifestyles and therapies.

Development of the Strategy

Key aims and challenges for sustainable tourism

Nearly 50 people representing tourism enterprises, local authorities and public sector tourism agencies met together in four meetings over the summer of 2009 to focus their thinking on the kind of tourism that they would like to see in the Forest of Bowland AONB in the future, and how that might be achieved.

A 'SWOT analysis', a list of strengths, weaknesses, opportunities and threats to sustainable tourism in the Forest of Bowland AONB was produced by participants and is presented below.

The Forest of Bowland AONB has a significant number of Strengths

- ☺ Centre of Great Britain
- ☺ Contrasting and variety of landscapes – in a small area
- ☺ Quality artists
- ☺ Peace & quiet
- ☺ Co-operation between businesses
- ☺ Walking area
- ☺ Cycling
- ☺ Outdoor activities and centres
- ☺ Food, places to eat and local producers
- ☺ Speciality shopping
- ☺ Location and identity – low profile
- ☺ Don't spoil it by over-commercialising it – we like the peace and quiet and so do our guests!
- ☺ Excellent image database
- ☺ Variation in types of accommodation
- ☺ High quality accommodation, attractions and eateries
- ☺ Magical
- ☺ Dedicated and professional AONB team, good communication with businesses
- ☺ Good link between businesses and the landscape assets
- ☺ Local knowledge and enthusiasm of businesses
- ☺ Development of food and local products as an attraction
- ☺ Good partnership working – LBTB, districts
- ☺ Undiscovered, natural beauty, freedom to explore, network of lanes & villages
- ☺ Good landscape management – looks well cared for
- ☺ 'upmarket' image
- ☺ Friendliness of local people

It also has some areas of Weakness

- ☹ Maps
- ☹ Footpath and road signage
- ☹ Difficulties navigating
- ☹ Limited child and family friendly activities
- ☹ No 'stately homes'
- ☹ Lack of public transport
- ☹ Not enough public/community transport – need to offer to day visitors and walkers to reduce car use and congestion
- ☹ Lack of serviced accommodation
- ☹ Limited disabled access
- ☹ Location and identity – low profile
- ☹ Limited serviced accommodation (at the right price)
- ☹ Lack of campsites
- ☹ Links not developed enough with gateway towns

- ☹ Need for more cross promotion of Bowland for family friendly activities – e.g. rainy day guide, showcasing attractions nearby (Lancaster, Preston, Morecambe, Settle etc)
- ☹ Never enough funding for promotion, literature, publicity, maps, etc.

There are many good Opportunities for development

- ☺ Heritage and history
- ☺ 'capacity' to take more visitors – especially cycling and coach tours
- ☺ Potential to link arts with business network and venues within the Forest of Bowland AONB
- ☺ Develop more family opportunities
- ☺ Get on the Activity Tourism bandwagon – walking, mtb, geocaching – and encourage more of these active visitors to stay in the Forest of Bowland AONB
- ☺ Links with urban areas (outreach) – e.g. Lancaster, University, Bay, E Lancs
- ☺ Increasing networking between businesses – e.g. distribution of business leaflets and promoting one another
- ☺ Growing interest in green and sustainable holidays
- ☺ National networks and links – eg Pennine Bridleway, Way of the Roses
- ☺ Europarc network
- ☺ Cross marketing – gateway towns, family friendly
- ☺ Familiarisation days with TICs, encourage greater use of website at TICs and gateways
- ☺ New media – web2, Bluetooth etc
- ☺ Working with outdoor activity providers located in Lancashire – encourage them to use the Bowland product
- ☺ 'stay-cation' trend – stay at home holiday makers
- ☺ Lancashire Green Infrastructure – how to maximise benefits of this, also in Craven
- ☺ Disabled and 'grey' market – accommodation and activities – link to 'Welcome All' training for providers

And some continuing Threats

- ☹ Competition from other areas (Lakes, Dales) and organisations (eg RSPB visitor payback scheme) – what makes Bowland special and different from all the rest?
- ☹ Potential to be over run with the 'wrong sort' of visitors
- ☹ Inconsistency in charging for car parking – can affect visitor patterns
- ☹ Public transport cut backs
- ☹ Public spending cuts affecting Forest of Bowland AONB and other support for tourism
- ☹ Public spending cuts (local authority, transport, environment)
- ☹ Inconsistent numbers of visitors: peaks and troughs of visitor flows
- ☹ Low profile of area
- ☹ Pressure on honeypot sites – need for positive management
- ☹ Saturation in neighbouring areas leading to increase in visitors – especially motorbikes and car users

Collective ambitions for tourism in the Forest of Bowland AONB

Participants expressed their collective ambitions for tourism in the Forest of Bowland AONB as follows:

IMAGE:

The Forest of Bowland AONB to be known as....

- ☺ Friendly hosts and locals
- ☺ Somewhere to return to
- ☺ Hidden gem
- ☺ Well defined identity
- ☺ An outdoor playground
- ☺ Unique diversity of landscapes in a small area
- ☺ Highly committed businesses, passionate about the environment

PRODUCT:

There should be...

- ☺ Maps and information
- ☺ Dog friendly pubs and accommodation
- ☺ Activities
- ☺ Walks and other activities – more accessible for families and mobility impaired
- ☺ Accessible accommodation

PROCESS:

Tourism in the Forest of Bowland AONB should be based on...

- ☺ Partnership
- ☺ Commitment
- ☺ Sense of place
- ☺ Advertising and promotion
- ☺ Continuation of our Network, development of BTEF and BExperience

RESULT:

Visitors should leave the area feeling...

- ☺ They have made a personal discovery
- ☺ Found a home from home
- ☺ They want to come back
- ☺ Welcomed
- ☺ Amazed by the beauty

From these ideas, issues and suggestions we have developed this strategy, and in particular the vision and aims detailed in Part 1, and the detailed objectives and priorities for action as set out in the accompanying Action Plan in Part 4.

The European Charter

This information was then viewed alongside the European Charter which refers to four key aims of sustainable tourism in protected areas. These are set out below. Under each, we identify the main challenges we see in the Forest of Bowland AONB. These aims and challenges were stated in 2004 and stay largely unchanged in 2009.

EPC Aims relating to the Forest of Bowland AONB:

To protect and gain value from the natural environment and cultural heritage

The quality of the natural environment of the Forest of Bowland AONB, and its importance for conservation, are high. Protection of this special environment must be an overriding aim. There is little evidence that current visitor pressure poses any great threat to the environment. The greatest challenge is to find ways in which the special appeal of the natural environment and heritage can be used to strengthen the tourism offer.

To increase the economic and social benefits from tourism

The Forest of Bowland AONB is not a homogeneous area, and its economy reflects this. Future prospects for farming, especially in the remoter upland areas, are uncertain, although Bowland seems relatively well placed to cope with this time of change. Tourism cannot always compete as an economic option in the relative prosperity of the Ribble Valley area. A key challenge is to attempt to increase the proportion of visitors that stay overnight. Particular issues are to bring in more visitors outside the main season, and to increase the level of spending per head that benefits the local economy.

To protect and improve the quality of life of local people

The main benefit that tourism can bring to local people is probably economic, but is also important that tourism supports the rural services on which those that live in the Forest of Bowland AONB depend. On peak days, the high numbers of day visitors require sound management to avoid a detrimental impact on local communities. Local communities can also gain benefit through sharing with visitors their own appreciation of the area's special qualities.

To improve the quality of the tourism offer in line with market opportunities

The quality of tourism enterprises is good, in some places very high. There are some outstanding and successful businesses, especially those that serve the affluent urban markets to the immediate south, and there has been recent investment in some sectors. However, the area is not well known as a destination for staying visits, and there is a need to develop a higher profile for the area through the creative development and marketing of tourism offers.

ECP Principles relating to the Forest of Bowland AONB Strategic Aims

The associated Principles of the European Charter are shown here as they relate to the seven aims of this Strategy:

1. Develop a strong brand identity for the Forest of Bowland AONB as a destination

Links to:

ECP1 To involve all those implicated by tourism in and around the protected area in its development and management

ECP5 To communicate effectively to visitors about the special qualities of the area,

2. Develop and promote tourism products which reflect and celebrate the Forest of Bowland AONB's sense of place

Links to:

ECP5 To communicate effectively to visitors about the special qualities of the area,

ECP6 To encourage specific tourism products which enable discovery and understanding of the area,

ECP7 To increase knowledge of the protected area and sustainability issues amongst all those involved in tourism

3. Develop and promote products which encourage quiet, accessible and quality enjoyment of the Forest of Bowland AONB

Links to:

ECP4 To provide all visitors with a high quality experience in all aspects of their visit,

ECP3 To protect and enhance the area's natural and cultural heritage, for and through tourism, and to protect it from excessive tourism development

4. Support the area's tourism businesses to develop high quality and sustainable business practices, and to maintain a network of sustainable businesses

Links to:

ECP4 To provide all visitors with a high quality experience in all aspects of their visit,

ECP6 To encourage specific tourism products which enable discovery and understanding of the area,

ECP7 To increase knowledge of the protected area and sustainability issues amongst all those involved in tourism,

ECP8 To ensure that tourism supports and does not reduce the quality of life of local residents,

5. Support local communities and volunteers to ensure engagement in tourism planning, and to generate community benefit from tourism activity in the Forest of Bowland AONB

Links to:

ECP8 To ensure that tourism supports and does not reduce the quality of life of local residents,

ECP9 To increase benefits from tourism to the local economy,

6. Develop and maintain partnerships supporting the development and management of sustainable tourism in the Forest of Bowland AONB

Links to:

ECP1 To involve all those implicated by tourism in and around the protected area in its development and management

7. Develop strategies to improve the collection and analysis of tourism related data so that informed decisions can be made by all partners

Links to:

ECPI0 To monitor and influence visitor flows to reduce negative impacts,



Results of the Sustainable Tourism Working Group's action planning session held on 2 July 2009 at Slaidburn Village Hall, showing the development of aims and associated actions which had been generated by stakeholders

Part 3: Appendices

1 Summary of work to date - Action Plan delivery 2005-10

2 Charter Principles

3 Sustainable Bowland evaluation

4 Case Studies

Sustainable Tourism Business Network and GTBS Accreditation

Natural Tourism web resource

Wyresdale Wheels: Access for All

Sense of Place Toolkit

LBTB Country Escapes marketing campaign

5 Visitor and Business Surveys and Trends Report

6 Structure and remit of the Forest of Bowland AONB Partnership, AONB Unit and Sustainable Tourism Forum

7 Maps

1 Distribution and type of accommodation provision

2 Distribution of attractions and places to eat

3 Public Rights of Way and Access Land

4 Distribution of Business Network members