

## Visitor Survey

### Key Findings – changes between 2004 and 2009

The results reveal some marked differences in the responses between 2006 and 2008. In general these differences have highlighted positive change through such things as an increase in the length of stay of visitors, a higher preference for camping and caravanning, an increase in visitor spend and an increase in general awareness of the Forest of Bowland as a 'destination' and a greater understanding that Bowland is an Area of Outstanding Natural Beauty. There has also been an increase in the number of visits to the website and a change in the variety of information that people are visiting. There has been increased website developmental work undertaken by the AONB during 2008 and 2009, including linking of accommodation and events to Lancashire and Blackpool Tourist Board's website. This has had impact on the visitor experience with 10% of visitors finding their accommodation via the searchable database on the Forest of Bowland website.

It is difficult to draw direct comparisons between the 4 years that the survey has been implemented due to the way in which the questionnaire has evolved. The majority of questions have changed from 2004 to 2009 however; direct comparison can be highlighted between 2008 and 2009 and are highlighted below:

- The majority of visitors to the area in 2009 fall into the 35 to 54 age group and the 55 to 64 age group; the same pattern emerged in 2008, although there was a higher representation in the 11 to 15 and 16 to 24 age group from 2008.
- The majority of visitors to the Forest of Bowland come from within Lancashire, again a similar pattern to what emerged in 2008. However, in 2009 there was some representation from different areas such as Derbyshire, Merseyside and Scotland.
- There was an increase in the number of day visitors from 2008 (+9%), and a decrease in overnight visitors (-12%), the amount of visitors that actually live in the AONB did not differ that much from 2008.
- In 2009 the majority of overnight visitors stayed between 2 to 4 nights, with a significant reduction in visitors staying for just one night compared to 2008. In turn the number of visitors staying for 2 to 4 nights increased from 36 to 66%.
- In 2008 the most popular type of accommodation was B&B followed by camping & caravanning and self catering. This changed significantly in 2009 with a high percentage of visitors staying with friends and family, followed by self catering, camping & caravanning and then B&B.
- As in 2008 the most popular way of finding accommodation in the Forest of Bowland was by using a Google search and the majority of visitors still prefer to book their accommodation direct with the provider on the telephone.

- With regards to green accredited accommodation, 40% of the overnight visitors were not aware of it at all (in 2008 it was over 50% of visitors), and 25% would not consider it when booking accommodation. As in 2008 a significant number of visitors would choose green accredited accommodation if all things were equal. No visitors in 2009 would always have a preference for green accredited accommodation.
- There was a disappointing response relating to the awareness of tramper trails for pushchairs and trampers, of the 6% that had come to the area with a pushchair, none of them were aware of the trails. In 2008 there was an encouraging level of awareness for the tramper trails; this however can be attributed to the low response rate at the Beacon Fell site where the trampers are normally hired and utilised.
- As in previous years the majority of visitors arrive to the area via car, however, there was an increase for travelling to the area on pushbike compared to previous years, which in part can be attributed to the visitors who had arrived by bike for the Tour of Britain Cycle Race through Bowland.
- In 2009 the area that received the most spending from visitors was café/pubs/restaurants with 60% spending between £1 and £5, in 2008 the same pattern emerged, however the amount of spend was higher with the majority spending between £6 and £15. The other areas with significant spending were car parks, gifts/crafts and petrol.
- As in 2008 the majority of visitors to the area are regular visitors living outside the AONB followed by people who visit a few times a year.
- The three main reasons why people visit the Forest of Bowland have not changed since the 2008 survey; the majority of visitors still visit the area for walking, pleasure visit and for visiting the Forest of Bowland as a 'destination' in its own right.
- Beacon Fell, Gisburn Forest, Trough of Bowland and Slaidburn were the visitor's favourite places to visit in 2009. Dunsop Bridge featured as a favourite place in 2008.
- With regards to what visitors like best about the area, peace and quiet and the scenery were the most popular options again the same result that emerged in 2008. Also a high percentage liked the fact that it was easy to get to.
- In 2009 there was a reduction in the amount of visitors that had visited the website from 2008, of the 12% that had, 83% had found the information good or excellent. This isn't however reflected in the website statistics, which actually shows an increase in visitors since 2008.
- Mirroring last years findings, the local facilities and services were rated almost the same, with children's play areas and public transport being the least used services.
- There was a positive change in the number of visitors using Bowland leaflets this year, nearly 50% of the visitors had used at

least one of the leaflets (compared to less than 25% in 2008). The most popular leaflets as in 2008 were the Discovery Guide, general leaflet and village leaflets, with the Bowland by Bike leaflet becoming more popular this year.

- 48% of visitors would be interested in buying Bowland branded products (this was a new question for 2009). Most suggestions related to local food and drink.
- 93% of visitors had not attended any guided walks or events, and as in 2008 of those that had, the majority had attended Festival Bowland events.
- General comments from the visitors were similar to those that emerged in 2008; requests for more advertising and publicity on events and the area, and more events held for children.