South West Tourism

FARM TOURISM WITHIN THE CONTEXT OF RURAL TOURISM

Final Report

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1 INTRODUCTION

Introduction

- 1.1 Atlantic Consultants were commissioned by South West Tourism in March 2002 to undertake a study of Farm Tourism within the context of Rural Tourism, covering demand and strategy issues. This study formed part of a wider study including supply issues.
- 1.2 The study was undertaken by Atlantic Consultants with Chapelhouse Product and Service Solutions (who undertook the qualitative research into demand for farm and rural tourism) and the South West Tourism Research department with Carrier Direct (who undertook the quantitative research into demand for farm and rural tourism).
- 1.3 The study was directed by South West Tourism and funded by the European Union and the Department of Environment, Food and Rural Affairs.

The Brief

- 1.4 The brief for the wider study specified three study elements:
 - ?? To Establish Existing and Future Market Demands for Rural (including Farm) Tourism
 - ?? Supply in the Farm Tourism Sector
 - ?? Identification of a Six Year Plan for the Development and Promotion of Rural Tourism

To Establish Existing and Future Market Demands for Rural (including Farm) Tourism

- 1.5 This section covers the demand for rural tourism and, within it, farm tourism. Specific areas include:
 - ?? Customer characteristics
 - ?? Customer perceptions about the differential between farm and rural based tourism
 - ?? The customer importance of links between farm/other rural tourism businesses and conservation/green tourism programmes
 - ?? Propensity to visit
 - ?? Comparison of farm/rural holidays to other types of holiday in the South West and elsewhere
 - ?? The level of interest in 'Special Interest' holidays
 - ?? Preferred accommodation now and predicted change in preferences by 2007

- ?? Expectations of facilities such as ensuite for serviced accommodation, or level of facilities for camping/caravanning
- ?? The importance of other nearby facilities such as shops, pubs and public transport
- ?? The importance of the availability of farm shops and local produce, including whether the choice of where to eat out is influenced by the availability of regional produce and menus
- ?? Sources of information used to find a holiday
- ?? The effectiveness of the Internet
- ?? Bookability
- 1.6 South West Tourism indicated that Special Interest holidays were identified as an area of special interest in this study, and that bookability issues were being covered in detail in another, separate, piece of research.

Supply in the Farm Tourism Sector

1.7 The issues that are considered through separate research as part of the supply element of the study relate to establishing the supply of farm (as opposed to general rural) tourism facilities, by type, price, facilities and on and off-farm activities. This includes the mapping of facilities, along with provision of special interest activities. This element also includes performance evaluation, covering both occupancy/numbers of visitors and assessment of activities.

Identification of a Six Year Plan for the Development and Promotion of Rural Tourism

- 1.8 The identification of a Six Year Plan pulls together the outputs from the demand and supply work, comparing the product currently available against the identified demand. It also considers the likely future changes and how the relationship between supply and demand might change.
- 1.9 Specifically, this includes:
 - ?? Which markets and products have the greatest potential
 - ?? Whether, where and how the sub-sectors can be further developed (or discouraged)
 - ?? How the holiday experience could be enhanced
 - ?? How to increase the spend per head in rural areas, and reduce leakage from the rural economy
 - ?? Identify marketing and related support needed for rural tourism in the context of emerging subregional brands

- ?? Identify new and innovative ways for individual operators and umbrella marketing organisations to reach customers
- ?? Identify training and business support required.
- 1.10 The underlying aim of this element of the study is to generate recommendations for action to grow the way in which tourism can benefit the rural economy in the South West and, in turn, how the rural tourism industry can build overall tourism activity in the region.

Report Structure

- 1.11 Following this introductory session the report is set out as follows:
 - ?? Section Two Review of Previous Studies
 - ?? Section Three Demand for Countryside and Farm Tourism
 - ?? Section Four Development of Farm and Rural Tourism
 - ?? Section Five Product Market Fit
 - ?? Section Six –Identifying the Six Year Plan
- 1.12 Section Six summarises the main issues from the rest of the research and forms the summary.

2 REVIEW OF PREVIOUS STUDIES

Introduction

- 2.1 There have been numerous studies with information about farm and rural tourism, and the most relevant have been reviewed here. These will provide a context for the findings of the new research carried out as part of this study, and to the identification of a six-year plan to grow the way in which tourism can benefit the rural economy in the South West.
- 2.2 This section is structured around the issues identified in the brief:
 - ?? Markets and products
 - ?? Development of sub-sectors
 - ?? Enhancing the holiday experience
 - ?? Increasing economic benefit
 - ?? Marketing and related support for rural tourism
 - ?? Reaching customers
 - ?? Business support

Markets and products

2.3 The United Kingdom Tourism Survey is able to provide information on the destination type of UK staying trips taken by British residents. Nationally, 19% of the 185.1 million trips in 1999 were to countryside/village destinations, against 22% of the West Country's trips. The West Country has a lower share of its trips to countryside than some other English regions (such as Cumbria, Heart of England and East of England), but this has more to do with the strength of the West Country's seaside product than weaknesses in rural tourism.

Type of Location Stayed at

Location type	% of UK Staying Trips	% of West Country Staying Trips
Seaside	27	45
Large city/large Town	34	21
Small town	21	14
Countryside/village	19	22

Source UKTS 1999

2.4 Nationally, 57% of countryside trips are between one to three nights duration, 29% are four to seven nights and 14% are eight or more nights. This is a different profile to seaside destinations (34%, 39%)

and 26% respectively). Also at a national level, the countryside, along with the large urban destinations, a relatively upmarket destination compared with the seaside.

Type of Location Stayed at by Socio-economic Group

Location type	% of Trips by			
	AB Socio-	C1 Socio-	C2 Socio-	DE Socio-
	economic	economic	economic	economic
	Group	Group	Group	Group
Seaside	20	27	34	33
Large city/large Town	40	35	27	33
Small town	21	22	21	20
Countryside/village	22	18	20	15

Source UKTS 1999

- 2.5 While UK seaside destinations are more likely to receive trips by those with dependent children under 15 years old (31% of those with against 25% without), countryside locations take an equal share of the trips by those with children and those without (19% of each group's trips respectively).
- 2.6 The UK countryside is less likely to receive trips by those without a car in the household. 20% of the trips by those with cars are to the countryside while 16% of the trip[s taken by those without cars are to the countryside.
- 2.7 The trips to the countryside display a seasonal pattern. The least visited months are January and November 4% and 5% respectively, split by the Christmas season with 10% of the year's trips in December). Along with December, July and August are the most visited months (10% and 14% respectively). The seasonal pattern is very similar to the UK average.

Seasonality of Trips to the UK Countryside

Time of Visit	% of UK Countryside Staying Trips
January - March	18
April - June	26
July – September	32
October - December	24

Source UKTS 1999

2.8 While 22% of the staying trips to the West Country are to the countryside, 20% of the nights and 18% of the expenditure is in the countryside – indicating that trips are shorter and with less spend than the average.

Type of Location Stayed for West Country Trips, Nights and Spend

Location type	Trips %	Nights %	Expenditure %
Seaside	45	54	58
Large city/large Town	21	13	12
Small town	14	13	11
Countryside/village	22	20	18
All destination total	19.1 million	84.9 million	£2,879 million

Source UKTS 1999

2.9 Since 1994, the number of trips to the West Country countryside has increased by 24%, although this increase follows a decline to 1996 and subsequent recovery. Nights rose by 4% and unadjusted expenditure by 8% during this period, with the same pattern of decline to 1996, presenting a picture of more, shorter trips with less expenditure.

West Country Countryside Trips 1994 to 1999

Countryside Staying Visits	1994	1995	1996	1997	1998	1999
	million	million	million	million	million	million
Trips	3.4	3.4	3.0	3.5	3.8	4.2
Nights	16.6	15.9	14.1	15.6	16.7	17.3
Expenditure (not adjusted for inflation)	£492	£386	£446	£424	£547	£531

Source UKTS 1999

Markets

- 2.10 *Tomorrow's Tourism* (1999, DCMS) indicates that tourists of the future will be:
 - ?? More affluent, but cautious with money
 - ?? More likely to be travelling alone
 - ?? Take more shorter breaks as work schedules are juggled
 - ?? Short of time and seeking leisure and seeking easy to research and book tourism experiences
 - ?? Increasingly knowledgeable and keen to follow an individual needs approach rather than a package
 - ?? Older but fitter and less willing to accept a sedentary lifestyle
- 2.11 Working for the Countryside (English Tourism Council and the Countryside Agency) indicates that total spending by visitors in the English countryside amounts to £12 billion per annum, supporting 380,000 jobs. In some locations, particularly in the more remote locations, tourism is the dominant economic activity. A quarter of holiday stays by the British are in countryside locations and the countryside contains at least 25,000 establishments, 39% of the known accommodation stock. Rural images and heritage are important in attracting overseas visitors.

- 2.12 *Working for the Countryside* also indicates that:
 - ?? Holiday trips to the English countryside grew in the early 1990's but have since remained relatively static. UK residents now spend twice as much on countryside holidays abroad than on such holidays in England.
 - ?? Growth in the volume of short breaks to the countryside now mean that 1-3 night trips account for 56% of overnight holiday trips.
 - ?? There has been an increase in off-season visiting and the countryside has become a popular choice for second holidays.
 - ?? There has been significant growth in the volume of day trips to the countryside. The average day visitor spends £15 per day, almost half as much as an average overnight visitor.
 - ?? Trips to the countryside for business or to visit friends and relatives have been growing faster than holiday taking.
 - ?? 1998 figures indicate that overseas visitors to the countryside contribute about 25% of total visitor spending and that, in the last ten years, the countryside has seen a faster growth in overseas visitors than other types of destination.
 - ?? The countryside is most popular with the 25-54 age group (with a peak at 35-44) with or without children. Young families are more likely to prefer the seaside. Rural visitors are more up-market than holiday makers as a whole almost two-thirds are ABC1.
 - ?? Market segments with potential for growth are identified as:
 - ?? Short break takers, mainly up market without children, late booking and seeking easily accessible destinations.
 - ?? Extended break takers, a more mixed market taking 3 4 nights away.
 - ?? Longer holiday takers couples and families often using self-catering, camping and caravans, seeing activities.
 - ?? Business visitors seeking quality convenient accommodation and conference venues.
 - ?? Visits to friends and relatives.
 - ?? Activity, special interest and educational segments
 - ?? Overseas visitors, particularly those from North America, Australia and Northern Europe, seeking rural heritage experience.

- 2.13 The Farm Tourism Market (1993, Denman) notes that 45% of the UK population are interested in staying on a farm, with a core 16% very interested. Families with children show greater interest (with 22% very attracted). Dominant images relate to peace and quiet, attractive setting, wholesome food, value for money, access to farmland and animals. The imagery is traditionally rustic and welcoming.
- 2.14 The Farm Tourism Market also indicates that there is an established business market for visitors, accounting for 16% of visitors. This is very much concentrated in the Bed and Breakfast farm accommodation, with repeat off-season visits. Most find farms more attractive than rural Bed and Breakfasts in general, with price, peace and quiet and breakfasts as important factors. The right location with easy access is critical, restricting the farms that potentially could serve this market. The report also indicated that the overseas market offers opportunities for farm tourism, particularly through rich rural green images of England, and opportunities to meet English people. Touring overseas visitors are likely to be the main part of this market.
- 2.15 A Study of Farm Tourism in the West Country (1990, Denman) indicates that families with young children are relatively important to farm tourism, particularly self-catering, although the retired couples market is particularly relevant for Bed and Breakfast providers. While there is a bias towards the AB socio-economic group, this is not exclusive and other groups should not be ignored. The report also points towards a growing interest in environmental issues amongst potential visitors, and noted that overseas markets offered potential.
- 2.16 The West Country study refers to previous research (Frater, WTB) which suggests that for the majority of visitors the type of facility, and its ruralness, is more important than the fact that it is actually on a farm. However, a farm address virtually guarantees a countryside location.
- 2.17 The Farm Tourism Market (2002, Haydn Morris Tourism) indicates that farm tourism visitors are particularly likely to be aged 35-44, come from the AB socio-economic group and travel with children. By comparison, general countryside visitors have a more even distribution across the socio-economic groups, and are more likely to include young adults. This study also presents Farm Stay research information demonstrating that although families were more likely to be choose self-catering and couples were more likely to use farm Bed and Breakfast, this was not absolute.

Party Composition

Group Type	Bed and Breakfast %	Self-catering %
Families	17	55
Couples	61	36
Singles	18	3
Groups	4	6

Source: Farm Stay 1998

- 2.18 *The State of the Countryside* (2001, Countryside Agency) notes that:
 - ?? Recreational use of the countryside and public interest in countryside access have increased in recent years in 1998, 24% of all leisure day visits were to the countryside and in 1999 staying visits to the countryside accounted for 25% of total domestic tourism. Between 1993 and 2000 the

- number of tourist trips to the countryside grew by 50%, although there has been a gradual shift towards shorter more frequent trips, with 1-3 night stays now accounting for 56% of the total countryside market.
- ?? Trips to the countryside are more likely to be by ABC1 socio-economic groups than trips to the seaside (although trips to towns/cities have the same sort of visitor profile as the countryside).
- ?? People visiting the countryside tend to be aged 25-54 (peaking at 35-44) with or without young children (generally young families tend to prefer seaside destinations).
- ?? Holidays in the countryside are spread out across the seasons, with a significant proportion visiting during the winter. It is suggested that the countryside may be the destination for the additional holidays for those taking a longer break elsewhere.
- ?? The most popular English country holiday destination is the West Country (almost 14 million nights in 2000), followed by the East of England and the Heart of England (10 million nights each). People stay at the home of a friend or relative (46%), hotel or guesthouse (12%), caravanning (13%), camping (8%) or in a farm house (1%).
- ?? 45% of tourists visit the countryside simply to enjoy it. Proportions of those taking part in specific activities (i.e. the other 55%) are detailed in the table below.

Proportions of people taking part in different activities when visiting the countryside

Activity	% of countryside visitors
Hiking, walking and rambling	19%
Swimming	16% (of which 11% is indoor swimming)
Visiting heritage attractions	13%
Visiting a theme park	6%
Cycling	6%
Sailing (yachting & motorboat cruising	5% (of which 1% is sea angling)
Fishing	5%
Field/nature studies	4%
Pony trekking/riding	2%
Shooting/stalking/hunting	2%
Mountaineering/rock climbing	2%
Other sports and leisure	20%

Source: ETC 2000

- ?? Of the 24.7 million trips made to the countryside in 1999, 85% were made by car, 5% were by train, 2% were by public bus or coach, 2% were organised coach trips and 6% were by other means.
- 2.19 *The Farm Tourism Market* (2002, Haydn Morris Tourism) indicates that farm visitors are more likely to undertake activities than general countryside visitors, particularly long walks.

- 2.20 Farm Tourism 2000 Research (1998, Tourism Associates) used telephone interviews to build a profile of farm tourism market in the South West:
 - ?? The majority of farm Bed and Breakfast users do not have dependent children. Farm Bed and Breakfast users are more likely to be in the 45-54 year age group, belong to a conservation group, come from a rural background and to have a vegetarian in the household. Farm self-catering users are more likely to have dependent children, be aged 35-44, and belong to a conservation group. Farm camping users also were more likely to have children, and were likely to come from a rural background.
 - ?? Farm attractions were of more interest to women than to men. Users were more likely to be 35-44 years old and have dependent children. Farm shops and restaurant users were also more likely to be women, have dependent children, and be 35-44 or over 65 years old.
 - ?? Positive farm attributes for both accommodation and attractions are hospitality of country people, farm location, cooking and the adventure factor for children.
- 2.21 *Devon Farms Market Research 2001* (2002, Tourism Associates) provides information on the key overseas market segments for Devon farm accommodation:
 - ?? Affluent older empty nesters from the Commonwealth and Benelux countries, usually on their main multi-centre holidays, of which the Devon farm Bed and Breakfast will be just one stop. Interests are tranquillity and heritage rather than active pursuits, and they are the overseas segments most interested in home cooking and a warm welcome.
 - ?? Affluent younger couples from Germany, also on a multi-centre holiday, but many not booking prior to arriving in the UK. They are more likely to be seeking the active elements of rurality, and less likely to be experienced UK visitors or English speakers.
 - ?? Affluent families from Germany, not on a short break, staying longer on the farm and less likely to be staying elsewhere. More likely to be in self-catering and unlike the other segments, beaches and farm animals do feature in the appeal although the countryside setting underpins everything.
- 2.22 Devon Farms Market Research 2001 also indicated that the countryside is at the heart of the appeal for visitors, with the specific farm dimension appeal more limited (except for farm animals and children). However, it is suggested that farms can be positioned as the best way to experience the main motivational factor the countryside. The farm offer should be secondary to the location. Modern farming methods may not fit well with the bucolic images held by visitors, although farm accommodation does offer an authentic experience.

Products

2.23 *Tomorrow's Tourism* indicates that the quality of the countryside provides the basic resource on which much of tourism depends, and in turn many rural areas are increasingly benefiting from tourism and

recreation, with which is now a larger industry than agriculture. The strategy notes the role of tourism in rural regeneration.

2.24 Working for the Countryside indicates that:

- ?? A majority of rural holiday makers stay in self-service accommodation. 32% stay in tourism caravans or camping, 17% in static caravans and 26% in rented accommodation. While Bed and Breakfast establishments account for 40% of rural accommodation businesses, they represent a lower proportion of capacity.
- ?? Rural visitors show signs of becoming more discerning, with an increasing demand for quality in accommodation and other facilities. More information is sought on which to plan visits.
- ?? Visitors to the countryside have become more interested in participating in activities. Walking remains popular and there has been a significant increase in cycling and other sports and pastimes, partly reflecting a growing interest in health and fitness. There is greater awareness of the possibilities for exploring and 'soft adventure', and there has been a growth in the membership of environmental organisations. Nationally, 22% of all rural holiday trips are coming to the countryside specifically for an activity, with the largest market being for short circular walks and family cycle routes. There is a small but growing market for holidays based on more demanding sports such as climbing and watersports, as well as markets for horse riding, water-based holidays, field studies, health and fitness, and field sports.
- ?? In general, accommodation supply outstrips demand. This indicates a need to improve the quality, viability and impact of existing stock rather than provision of additional accommodation.
- ?? There are specific recommendations for different types of accommodation:
 - ?? Hotels short breaks, business tourism, visitors to friends and relatives, better use of the strength of the English country house product
 - ?? Pubs and Inns higher profile for this sector, which offers a distinctive rural experience
 - ?? Bed and Breakfasts high widespread minimum standards and a range of prices
 - ?? Self-catering Cottages attention to local balance of supply and demand, increased flexibility to accommodate the needs of different segments
 - ?? Farm Accommodation high widespread minimum standards and a range of prices, but with promotion of the distinctive attributes and the links to local produce
 - ?? Hostels relating quality improvements to market aspirations, and using more inclusive branding to tackle misconceptions
 - ?? Camping barns/bunkhouses careful assessment of demand on a location by location basis

- ?? Holiday Villages recognition of their ability to need and absorb visitor demand, and their potential economic contribution to rural areas
- 2.25 Towards 2020 A Tourism Strategy for the West Country (1999, South West Tourism) cites the high quality of the environment in the South West as an essential element for residents quality of life, attracting inward investment and as the key factor in attracting tourism to the region. An area of 8,770 square kilometres in the South West is designated as nationally important in landscape terms, 37% of the total land area. The strategy vision, however, indicates that by 2020 cities and towns will have an increased share of the market, although there will be greater use of walking and riding networks. Valuing out Environment (1998, Tourism Associates) notes that 78% of South West holiday trips were motivated by the quality of the conserved landscape.
- 2.26 *Towards 2020* notes the opportunities for further accommodation provision on and off farms, particularly self-catering.
- 2.27 The Farm Tourism Market (1993, Denman) notes that there is a strong and well-satisfied market for farm Bed and Breakfasts, with a small majority of people who are using them doing so specifically because they are on a farm. Key aspects are peace and quiet, attractive setting, value for money and farmhouse breakfasts. For those specifically looking for farms, interaction with the host is an attractive feature and to a lesser extent, being on a working farm environment. The market is divided into:
 - ?? Couples the dominant market, mainly short breaks/touring, with a limited interest in farm related experiences
 - ?? Families a smaller market, mainly on longer holidays, higher proportion interested in farm experiences including access to farmland, animals and some participation
- 2.28 The Farm Tourism Market also indicates that the majority of people using self-catering on farms are families, with less of a specific requirement by users that the accommodation be on a farm. The dominant factor for families is the good environment for children, while for all groups, the attractive factors are the rural setting, followed by piece and quiet.
- 2.29 The Self-catering Holiday Cottage Rental Market 2001, Travel Business Partnership) points to a relatively flat demand nationally for self-catering between 1996 and 1999, although there is stronger demand for short breaks in self-catering.
- 2.30 The Farm Tourism Market indicates that the market for farm attractions is small but significant 13% of the population had visited a farm open to the public within the last 12 months. Twice as many had visited a farm shop (26%). The existing market for farm attractions is dominated by families with young children. There is very little relationship between those staying on a farm and those visiting farm attractions.
- 2.31 Ensuites are very important for Bed and Breakfasts and most visitors will be prepared to pay a premium for them (*The Farm Tourism Markel*). Within self-catering, the greatest interest is in single cottages,

- with complexes viewed as less attractive; and the greatest demand was for two-bedroom units with a sizeable demand for small units with just one bedroom.
- 2.32 Well-planned farm attractions should continue to be encouraged, subject to local supply and demand, and that hands-on appeal for young children is most important. There is also a need to broaden the appeal to the whole family, and that there are opportunities to build in food related elements.
- 2.33 A Study of Farm Tourism in the West Country recommends that slow overall growth should be encouraged in the stock of farmhouse Bed and Breakfasts, that ensuites be added and that décor, atmosphere and 'finishing buches' are vital. The study indicated the importance of coastal locations, with an average of 25 weeks let compared with an average of 22 week inland. Location was seen as the most important factor, followed by marketing and levels of repeat business.
- 2.34 Short and long walks, along with visiting a farm, buying farm produce and seeing craft production are the main activities that potential farm holiday visitors were very interested in (64%, 52%, 52%, 46% and 45% respectively *A Study of Farm Tourism in the West Country*). In terms of other activities, fishing generates relatively little holiday interest compared to recreation from home; riding offered alongside accommodation does attract interest and can extend the season; and shooting offers definite but small opportunities and may be counterproductive if offered to a wider market. Catering and farm produce were identified as generating opportunities although this worked best when able to service a resident as well as visitor market (although almost three quarters of potential farm visitors were interested in this activity).
- 2.35 Holiday Centres: Responding to the Consumer (1998, the Environment and Development Company) looks at the way holiday centres (including rural-based operations such as Center Parcs) responded to consumer demands for short break/additional holiday self-catering accommodation with a wide range of facilities suitable for year-round use.
- 2.36 The Rural White Paper (2000, HM Government) identifies increasing the enjoyment of the countryside as an important issue. The Countryside and Rights of Way Act 2000 gives improved access for recreation on foot to open country. The White Paper refers to the Countryside Stewardship scheme, which farmers can use to enhance enjoyment of the countryside, and to the regeneration opportunities provided by the creation of Community Forests. The White Paper also referred to the barriers to use of the countryside through lack of information about what is available and what can legitimately be done, and the intention to provide more information through schemes such as the National Access Database.
- 2.37 The Rural White Paper also notes the need for visitor management schemes to spread visitors from honeypot countryside sites to less visited areas. Within this issue, transport is seen as the key factor and better public transport infrastructure and the use of toll and car parking schemes is considered. The White Paper also notes the importance of accommodating sports and activities in the countryside without conflicting with the opportunities for quiet enjoyment sought by others. Inland waterways are identified as particular areas where greater access would be beneficial for many potential users, although this would need to be reconciled with the use by anglers. The National Cycle Network is providing continuous traffic-free routes and traffic-calmed minor roads reaching all parts of the UK.

Angling is noted as a popular use of the countryside, with over a million anglers a year buying licenses from the Environment Agency.

- 2.38 *The State of the Countryside* (2001, Countryside Agency) notes that:
 - ?? Many farmers have diversified or are considering diversification into a non-farming activity. 56% of farmers in England were currently operating a non-farming business, while 50% considered that such enterprises had potential on their farms in future. It is mainly the large farms and those with non-labour intensive production who have diversified or are considering new enterprises. Tourism will assume greater importance than more traditional diversification activities such as contracting and providing inputs for other industrial sectors.
 - ?? There has been rapid growth in the numbers of farmers markets. In 1997 there was only one farmers market, but by the beginning of 2000 there were an estimated 100 in the UK, and the National Association of Farmers' Markets (2001) suggest that this may have risen to 300. There has also been growth in direct marketing by farmers and growers, for example via farm shops and organic 'box schemes'.
 - ?? Public rights of way are the most important means by which the countryside is enjoyed on foot, horse or bicycle. The public rights of way network in the South West comprises 34,747 km of footpaths, bridleways and byways. The table below indicates the percentage of rights of way that are considered to be easy to use by members of the public.

Extent of ease of use of public rights of way, 1999-2000

Area	% considered	% considered easy to use	
	South West	England	
Regional Metropolitan	0%	78%	
Regional Unitary Authorities	72%	73%	
Regional Counties	71%	69%	

Source: Audit Commission 2000

- ?? As well as rights of way, other means of gaining access to the countryside are public open spaces, country parks and picnic sites, most beaches, towpaths on canals and rivers, some woods and forests, open country and coast owned by the National Trust, and the National Cycle Network. Dedicated cycle ways include the Camel Trail and the Bath-Bristol Cycle Path. The Countryside and Rights of Way Act 2000 will provide a new freedom of access to open countryside and registered common land.
- ?? In 1999 the top three visitor attractions charging admission in the region's countryside were Stonehenge (838,880 visitors), the Lynton & Lynmouth Cliff Railway (585,680 visitors) and Crealy Park (508,000 visitors). As well as the paid visitor attractions, the region attracts a large amount of visitors for walking, cycling and other outdoor pursuits e.g. the South West Coast Path attracted one million visits in 1998. The state of the countryside report notes that a range of visitor attractions has been developed in response to increased interest in the environment, such as

- Wildscreen at Bristol, bird watch cruises on the Exe, guided walks in AONB's and National Parks and the Eden Project.
- 2.39 *Farmers Markets* (1999, Tourism Company) includes information from the Bath Farmers' Market Survey 1997, which showed that freshness, quality, links with the producer and a willingness to support local businesses were the main motivations for users. Few people used them because of price.

Enhancing the Holiday Experience

- 2.40 Working for the Countryside emphasises the importance of accommodation for the staying visitor experience and recommends that the improvements in quality made in the previous decade are continued.
 - ?? The document cites research amongst operators suggesting that visitors require choice within a wide price range with a high quality experience overall, convenience (include short booking times) and rural character. The actual choice of accommodation within the range is then determined by family lifecycle and budget.
 - ?? While the harmonised National Quality Assurance Standards (ETC, AA and RAC) are an improvement on the old system, large numbers of small rural tourism enterprises are not inspected, partly because of owner preconceptions about costs and benefits.
 - ?? The promotion of local food and traditional dishes provides another dimension for visitors. There is further work to be done in demonstrating the merits to tourism enterprises, particularly if there is any cost premium.
- 2.41 The Farm Tourism Market indicates that quality standards are an issue for visitors to farms, with visitor comments relating to poor standards encountered by 20%, perceptions of inconsistent standards, and the likelihood that poor standards at one farm can put visitors off all farms. Within the context of standards, the report emphasised the need for individuality while providing the maximum facilities possible (the latter particularly important for self-catering).
- 2.42 Self-catering visitors showed more interest than Bed and Breakfast visitors in activities such as walking and cycling, as well as access to the farm (*The Farm Tourism Market*). This is because they tend to be staying longer and are more likely to have children.
- Although having a working farm environment was not a very important reason for choosing a farm, and interest in farm experiences was not extensive, it remains a key attribute which differentiates farms from other accommodation types. *The Farm Tourism Market* suggests that hosts gauge the extent of the interest in the farm at the outset of the stay and respond accordingly. The report also reinforces the importance of some interaction with hosts, including those staying in self-catering accommodation. Also emphasised is the importance of normal tourist activities such as visiting historic towns and attractions, undertaking short circular walks etc., and that farm accommodation has an important role in providing this information. Although there is no direct link between staying on a farm and a desire to visit farm attractions, there is interest in food-related purchases by those staying on a farm.

- 2.44 A Study of Farm Tourism in the West Country identifies interaction with the farming family and activities as an important area, although care is required as interest will vary considerably between visitors and farmers will need to gauge this interest on an individual basis.
- 2.45 A Study of Farm Tourism in the West Country concluded that fixed inclusive packaging of accommodation and activities was of relatively little interest compared to independent arrangement. However, the report recommended that local farm groups are ideally placed to put together countryside information packs covering farm or conservation visits, opportunities to buy or taste local foods, walks etc. However, the opportunities should not be presented in too dominant a way, as the majority of farm visitors are essentially looking for simple rural accommodation.

Increasing Economic Benefit

- 2.46 Farming and Food A Sustainable Future (2002, Policy Commission, Curry) notes that farms have managed risks by diversification into activities such as tourism. Importantly, the report also indicates that by far the largest share of non-agricultural income to farmers comes from off-farm sources, not onfarm diversification. Therefore it will be the health of the surrounding rural economy which will be the main driver for success. Nonetheless, tourism is seen as a key earner in rural areas, and a healthy, attractive and diverse farmed landscape is the foundation for its future. The lack of access to this resource during the Foot and Mouth crisis emphasised this relationship.
- 2.47 Farming and Food also notes that one of the greatest opportunities for farmers to add value is to build on the public's enthusiasm for locally produced food, that in the South East and South West this is beyond a niche market, but that there are barriers in the shape of lack of knowledge, local processing facilities and distribution networks. European research shows that customers are prepared to pay a premium for products with protected food names (such as Cornish Clotted Cream).
- 2.48 Working for the Countryside notes the role that local food and gastronomy can play by encouraging expenditure with, for example, 50% of day visitor spend in the countryside taken by purchases of food and drink.
- 2.49 The Economic Impact of Recreation and Tourism in the English Countryside 1998 (Geoff Broom Associates) provides estimates of the visitor spend at a national and regional level, and estimates of the benefiting economic sectors and employment supported at a national level.

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Countryside visitor expenditure

Area	UK Visitors	Overseas Visitors	Day Visitors
South West	£639m (20%)	£90m (12%)	£1,478m
England	£2,066m (19%)	£699m (6%)	£8,890m

Source: The Economic Impact of Recreation and Tourism in the English Countryside 1998

Note: Figures in brackets indicate the % of all regional spend by that visitor type taking place in the countryside.

Net England Tourist Expenditure by Sector

Sector	UK Visitors	Overseas Visitors	Day Visitors
Accommodation	37%	34%	0%
Retail	11%	25%	10%
Catering	26%	21%	52%
Attractions	5%	11%	17%
Travel	20%	10%	21%
Total	£1,916m	£687m	£8,942

Source: The Economic Impact of Recreation and Tourism in the English Countryside 1998

Note: Expenditure figures are adjusted to accommodate day trips from holiday accommodation

Estimates of Direct Actual Jobs in the English Countryside

Sector	Actual Jobs		
Accommodation	54,206		
Retail	23,415		
Catering	131,064		
Attractions	60,492		
Travel	20,760		
Total	289,937		

Source: The Economic Impact of Recreation and Tourism in the English Countryside 1998

Estimates of Direct Actual Jobs in the English Countryside

Area	Direct Jobs	Indirect Jobs	Total Jobs
South West	56,810	9,550	66,360
England	289,980	49,620	339,600

Source: The Economic Impact of Recreation and Tourism in the English Countryside 1998

2.50 The Economic Impact of Recreation and Tourism in the English Countryside 1998 indicates spending by visitors in the countryside is estimated to directly support almost 57,000 jobs in the South West, with another 9,550 jobs indirectly supported through linkage and multiplier effects, making a total of 66,360 actual jobs. The study notes that the economic impact of tourism in the countryside has grown since an earlier exercise in 1994, and that much of this has been driven by an overall growth in tourism, with an increase of 31% in overseas visitors, 17% in day visitors and 13% in UK tourist trips. Length of stay for staying trips has continued to shorten. Within the overall changes, the relative performance of countryside destinations has been lower than tourism as a whole in England – a growth of 11% in

countryside trips compared to the national growth of 17%. While overseas and day visits increased, UK tourist trips fell in absolute and relative terms. However, the report notes that 1998 was a poor year for tourism (partly because of the strength of the £). Other changes over time include an increase in the overall value of day and overseas visitor expenditure and an increased proportional spending by these groups on attractions/entertainment and travel.

2.51 Towards 2020 notes the role of tourism in regenerating rural areas, with visitor expenditure supplementing income to farms and other rural businesses, as well as tourism providing opportunities to use redundant sites as visitor attractions. The strategy also highlights projects such as the South West Forest and the Great Western Community Forest which complement existing provision in the Forest of Dean, and indicates that the growing network of walking and cycling provision provide opportunities for sustainable development. Also highlighted is evidence from rural schemes in and outside the South West which show that visitors will provide additional resources on a voluntary basis for local environmental enhancement schemes if contributing is easy.

Marketing and Related Support for Rural Tourism

- 2.52 Working for the Countryside indicates the need for further branding work for the English Countryside, comparing the lack of identity to other successful rural tourism brands, such as Gites de France. The importance of information provision is also noted, either through the TIC network or through accommodation, other tourism facilities and information points in shops and community facilities.
- 2.53 The Farm Tourism Market states that there is justification for promoting a separately identified farm tourism product, on the grounds that there is a large enough market seeking specific farm accommodation (as opposed to general rural accommodation). The report also states that:
 - ?? That Farm Stay (then the Farm Holiday Bureau) should be the main focus for marketing farm tourism and that the network should be extended (but retaining the working farm criteria). Local farm groups should review their marketing achievements and seek to strengthen their achievements through more joint work, supported by Regional Tourist Boards and Local Authorities.
 - ?? Consideration should be given to higher quality farm tourism brochures at a regional or area level combining groups and with more local rural theming.
 - ?? Efforts to support farms not in membership of one of the existing groups should be through bringing them into the wider network of marketing support (such as through an open policy on group membership or access to print at a price premium), rather than setting up duplicate structures.
 - ?? Farms should be given a special identity within general print.
- 2.54 A Study of Farm Tourism in the West Country recommended that the Farm Stay (then Farm Holiday Bureau) structure is well suited to the long-term needs of farm tourism because:
 - ?? It is a self-help mechanism run by farmers

- ?? It enable referrals
- ?? It is able to respond to or instigate local initiatives
- ?? It actively promotes training and improvement of standards
- ?? As a nationwide sector-based organisation it is well placed to raise the profile and image of UK farm holidays nationally and internationally
- 2.55 *A Study of Farm Tourism in the West Country* indicated that areas of particular need for support for farm tourism related to:
 - ?? Marketing of individual enterprises
 - ?? Pricing
 - ?? General visitor handling and presentation
 - ?? Interpretation at attractions
 - ?? Information and marketing packaging by groups
 - ?? Conservation work and associated interpretation

Reaching Customers

- 2.56 The Farm Tourism Market indicates that there is latent demand from a considerable market of people who are potentially interested in staying on farms but do not have the information to convert intention to action. To expand the market therefore, marketing will have to go beyond guidebook distribution and increase the activity in the areas identified by this latent group as sources of information newspapers, travel agents, TIC's.
- 2.57 The Farm Tourism Market also indicates that there needs to be a higher profile generic marketing of farm tourism, but this is beyond the resources of the marketing groups in this sector. Organisations supporting farm diversification in other ways such as DEFRA should consider marketing support to back up the other diversification activities.
- 2.58 Other aspects relating to reaching customers recommended by *The Farm Tourism Market* include:
 - ?? Farms and groups should maintain links with TIC's
 - ?? Further marketing group advertising wrapped-around individual members' ads in, for example, national newspapers can be used to build awareness as well as providing a response mechanism
 - ?? Increase the visual identity of farm accommodation through increased use of logo signage (such as that used by Farm Stay) by roadsides and farm gates

- ?? Further marketing of flexible short breaks at serviced and self-catering accommodation, responding to visitors desire to build trips around their own timescales
- ?? Use the potential for activities on some farms to generate media coverage, thus raising the profile for all farms (whilst recognising that serious interest in participation in formal activities is limited)
- ?? The wording and style of adverts is shown to be critical. Farms should increase professionalism and make use of training, and marketing and information print should become even more informative and user-friendly
- ?? Farms should carry detailed information on the local area, some of which could be sent to visitors before arrival. This will encourage longer stays and repeat business
- ?? Individual farms and groups who are geographically suited to attract business tourism should maintain regular contact with local firms concerning accommodation and meeting rooms, and use the media to raise awareness. Consortia of high quality farms with meeting rooms may be viable
- ?? The BTA should be seen as the main vehicle for information to the independent overseas visitor, with greater use of the Farm Stay brochure. Different markets will need different treatment of the farm and rural tourism, and walking and other rural activities should form a strong theme
- ?? Marketing of camping barns should be very much as part of a network, retaining links with the YHA and there should be further work done with schools
- 2.59 A Study of Farm Tourism in the West Country recommended that while central reservation systems facilitated use by the travel trade, particularly that serving overseas markets, it was of little clear interest to independent visitors and less popular with farmers, who felt that it was too anonymous and that it could be complicated and costly.
- 2.60 Farm Tourism 2000 Research recommends that marketing activity is concentrated in the four-hour drive time limit from Exeter, excluding London and Wales. It also recommends that marketing concentrates on people already receptive to visiting the South West, and that farm tourism marketing will have to work to create a strong identity separate from the general countryside image and that any separate branding should use the strong positive animal and farmer's wife images associated with farms. The report recommended that:
 - ?? Farm Bed and Breakfast should be particularly be targeted towards AB couples aged 35-44 with children under 10 and AB Couples aged 45-45 without dependent children. USP's are 'getting away from it all', farmhouse cooking and welcome and the central role of livestock. Those from rural areas are more likely to be interested.
 - ?? Farm Self-catering should be targeted towards the 35-54 year old group, particularly the 35-44 year olds. This accommodation is of particularly important for those with children up to the age of 10, and to those who are members of conservation groups and the USP's are the same as for Bed and

- Breakfasts, although the role of animals is less emphatic. This group is likely to be part of the South West's holiday market already.
- ?? Farm camping should be targeted to 35-44 year olds with dependent children aged up to 15, particularly those resident in rural areas. USP's are similar to other accommodation, although this group has more of an 'earthy' slant.
- ?? Farm attractions should be targeted towards women, 35-44 year olds, with dependent children aged up to 15. Those on holiday are more likely to be in serviced accommodation. Animal imagery is stronger than other parts of the set of farm tourism products.
- ?? Farm shops and restaurants should be targeted towards ABC1 couples aged 35-44 with children under 10, along with ABC1 couples aged 35-54 and 65 plus, without dependent children. Messages should be directed towards women, rural dwellers, conservation group members and vegetarians, with imagery reflecting the same USP's as the farm accommodation.

Business Support

- 2.61 Working for the Countryside indicates that although the introduction of the Small Business Service (SBS) has lifted the restriction of Business Links only dealing with organisations of 10 or more employees, there is a shortage of advisors with specialist tourism knowledge. Regional Tourist Boards are identified as having a role to play in the delivery of tourism expertise. Other sources of advice include the Farm Business Advisory Service operated by MAFF/SBS.
- 2.62 Working for the Countryside notes that there is a need for practical training courses in subjects such as marketing, use of ITC, customer care, interior design, catering and health and safety. Trained accommodation inspectors offer the potential to identify business support needs and opportunities.
- 2.63 Fragmented, duplicating business advice networks are identified as counter-productive by *Farming and Food*, along with the variable quality of business advice.
- 2.64 Rural Development and Land Use Policy (1998, Rural Development Commission) showed that 87% of tourism-based planning applications in a sample of rural areas were approved, compared to 90% for all applications (as quoted in Working for the Countryside). While planning policies play an important role in preserving the rural environment the main reason for visits business support needs to extend to providing planning officers and committees with the information they need to make a balanced judgement that allows tourism to develop with minimal impact to the environment.
- 2.65 Working for the Countryside also notes the importance of networking for the small independent businesses that characterise rural tourism. Three network types are noted; Area Networks (geographical), Sector Networks (e.g. Farm Stay) and Subject Networks (e.g. cycling-friendly networks).
- 2.66 A Study of Farm Tourism in the West Country recommended the increased use of accommodation inspectors as a first port of call in any support mechanism, along with banks.

- 2.67 Nationally, support for farms is through the Farm Business Advice Service. The Service has been developed by the The Department of Environment, Food and Rural Affairs(DEFRA) in conjunction with the Small Business Service (SBS, an Agency of the Department of Trade and Industry) with input from farming industry representatives. The Service is being delivered by Business Link, the information and advice service for small businesses.
- 2.68 The Service comprises up to 3 days of an advisers time for free, one-to-one, basic business advice resulting in the development of an Action Plan suggesting how to take the farm business forward. The Service is available until March 2004.
- 2.69 *The Farm Tourism Market (*2002, Haydn Morris Tourism) notes the impact of the multi-regional Northern Uplands Farm Tourism Initiative, providing business advice, investment grants and marketing support.

Conclusions

- 2.70 The West Country countryside takes 22% of the regions trips by British staying visitors, 20% of the nights and 18% of the expenditure. The number of trips has increased by 24% from 1994 to 1999, although nights and expenditure rose by considerably less presenting a picture of more, shorter trips.
- 2.71 Countryside trips abroad form strong competition for UK countryside trips, with UK residents spending twice as much on countryside trips abroad than in the UK.
- 2.72 The UK countryside is a popular destination for second holidays and short breaks. There has been a growth in day visitors to the UK countryside, and there is increasing interest in the UK countryside by visitors from overseas.
- 2.73 The main growth markets for farm and other rural accommodation are seen as:
 - ?? Short break takers without children, late booking destinations that are easy to get to.
 - ?? Extended break/longer holidays, more likely to be peak season, with children and in self-catering.
 - ?? Business visitors, seeking accessible locations
- 2.74 Ruralness is more important to visitors than actually staying on a farm.
- 2.75 The most common countryside activities are walking, swimming (mainly in pools) and visiting heritage attractions.
- 2.76 Farm Bed and Breakfast users are less likely to have children, unlike the self-catering users. Overall, self-catering is used more than serviced accommodation.
- 2.77 Transport issues, particularly congestion, have been identified as an issue requiring attention. Lack of knowledge about legitimate access to the countryside has restricted use.

- 2.78 Over half (56%) of farms are operating a non-farming business, mainly large farms. There has been a rapid growth in farmers markets.
- 2.79 There is a clear link between the affluence and vibrancy of the wider rural economy and the state of farm-based business.
- 2.80 Locally produced food is identified as offering major opportunities, with the possibility of attracting premium rates.
- 2.81 Spend by visitors to the countryside in the South West is estimated to directly support almost 57,000 jobs and indirectly support an additional 9,550 jobs a total of 66,360.
- 2.82 Fragmented, duplicating business advice networks are counter productive and a waste of resources.
- 2.83 There is a need for further branding work for rural and farm tourism, with a lack of identity compared to some other brands (e.g. Gites de France).
- 2.84 Funding support for farm diversification needs to be backed up by marketing support funding, in order to build demand and ensure the viability of the original investment.
- 2.85 There is a need for delivery of practical training courses on marketing, ITC, customer care, interior design, catering and health and safety.
- 2.86 Tourism-based planning applications are less likely to be approved than other applications.

3 DEMAND STUDY FINDINGS

Introduction

- 3.1 This section deals with findings from the demand element of the study. Information is drawn from consultations, focus group research and telephone research.
- 3.2 Consultations were undertaken amongst:
 - ?? Farm tourism marketing and development organisations
 - ?? Industry representatives
 - ?? Local Authority tourism/economic development representatives
 - ?? Agriculture representative
 - ?? Regional and National Tourist Boards
- 3.3 A list of consultees can be found in the appendix to this report.
- 3.4 Two focus groups were held amongst South East and Midlands residents, split between families with dependent children and those without dependent children. Those without dependent children were older couples. The written debrief for the focus groups is included in the appendix to this report.
- Telephone research was undertaken amongst 400 potential visitors. The sample was drawn from people responding to the South West Tourism Town and Country Lead Generation Campaign, with a subset drawn from those who indicated that they were particularly interested in farm accommodation. The analysis explored the difference between the two elements of the sample. A full set of tables from the telephone research are included in the appendix to this report.
- 3.6 The main analysis breaks for the telephone research are:
 - ?? General inland holiday enquirers against those who specifically enquired for farms
 - ?? Holidays with children against holidays as adults only
 - ?? Split by socio-economic group
 - ?? Split by age band
- 3.7 Please note that the database used for the telephone research was South West Tourism's Town and Country lead generation campaign. As such it will include those interested in staying in the region's historic towns as well as the countryside, although for convenience this group of potential visitors is referred to as a 'general countryside' group.

- 3.8 Much of this section deals primarily with rural and farm destination holidays. Visitor attractions are covered in a specific sub-section, drawn from the consultations
- 3.9 This section of the report is split into:
 - ?? Customer Types
 - ?? Perceptions
 - ?? Propensity to visit
 - ?? Accommodation
 - ?? Activities and special interest
 - ?? Conservation
 - ?? Local facilities and produce
 - ?? Bookability and information
 - ?? Visitor Attractions
 - ?? Summary

Customer Types

- 3.10 Both the focus groups and the telephone research provide information on the key markets for countryside holidays.
- 3.11 As part of the focus group work, participants were asked their views on the sorts of people most likely to take countryside holidays. They indicated that a 'typical' countryside visitor to the South West would be:
 - ?? Retired visiting for walking, relaxing, scenery and sightseeing
 - ?? Young family visiting a safe location, with plenty of visitor attractions, relaxing, and proximity to the beach
- 3.12 For both the market segments identified by the focus groups, the region was viewed as accessible, although the majority would still tend to pre-plan and book rather than make spontaneous trips. It was felt that there was not enough in the South West countryside to keep young couples without children or singles entertained, and that the increasing relative accessibility and off-peak costs made overseas destinations more attractive for these groups.
- 3.13 The telephone research showed that enquirers for farm holidays in the West Country are slightly less likely to be families with dependent children than those interested in more general holidays (9% of the

- general enquirers against 7% of the farm enquirers with dependent children). However, within those who did holiday with dependent children, those interested in farm holidays consistently had younger children.
- 3.14 Consultations indicate that the business tourism market offers opportunities for farm Bed and Breakfast businesses, with some farms (particularly those near urban areas) already receiving a significant part of their trade from business travellers. Tools such as web sites are felt to be key in this market, although it is acknowledged that competition is stiff, particularly from branded budget chains. The positives of the farm offering can be countered by perceptions about ease of access and unknown quality.
- 3.15 The consultations indicate that the split between domestic staying visitors and those from overseas is in line with the regional averages, with just fewer than 10% of visitors from overseas. Additionally the origin of domestic visitors is in line with the regional averages, with the majority from the Midlands, the South East and the South West itself. Within the overseas markets, the Dutch and particularly the Germans are the best prospects, and there is above average interest in Cornwall by Germans.
- 3.16 There are some indications that the level of interest from disabled visitors is continuing to rise, and there is a strong demand from large groups (e.g. college or family reunions). These two types of demand have a requirement for specific accommodation facilities and the influence of the actual destination (and maybe destination type) becomes less important.
- 3.17 The consultations also raised the issue about the affluence of future generations of older visitors. While it is likely that the impact of inherited wealth will continue, the likely future levels of occupational pensions looks set to fall. Although this issue stretches beyond the horizon of a six year plan, consideration will need to be given of how to compensate for part of the growth market losing wealth and probably cutting back on discretionary spend.

Perceptions

Countryside Perceptions

- 3.18 The countryside in the South West evoked positive reactions for the focus group members, in the following order of priority:
 - ?? Tranquillity
 - ?? Relaxation/de-stressing
 - ?? Slower pace of life
 - ?? Scenery
 - ?? Walks and countryside/coastal paths
 - ?? Community feel and welcome

- ?? Good food (shared association with other destination types too)
- 3.19 Younger focus group members were more likely to spontaneously think of farming when describing the countryside than the older focus groups.

Farm Appeal

- 3.20 The telephone research showed that overall the most important motivations for visiting a farm were 'being in the heart of the country', 'warmth of welcome' and 'relaxation' (48%, 42% and 34% respectively).
- 3.21 General countryside enquirers were much more likely to:
 - ?? View farms as a way of accessing the countryside than farm enquirers (57% against 37% of farm holiday enquirers)
 - ?? View farms as relaxing (40% compared to 28% of farm holiday enquirers)
 - ?? View farms as good for children (12% compared to 6% of farm holiday enquirers).
- 3.22 Relatively few of those specifically enquiring about farm holidays saw involvement in farm activities as being the main reason for visiting a farm. Farm holiday enquirers were only slightly more likely than general enquirers to see the warmth of welcome on farms as more of a motivator (44% against 40%).
- 3.23 Consultations indicate that some of the differences in the perceptions between farm holiday enquirers and general countryside holiday enquirers may relate to experience of staying on a farm. Those who have stayed on a farm (more likely to be farm holiday enquirers) would have a realistic view of what the experience might entail. Nonetheless, the similarities in terms of the warmth of welcome are as striking as the differences.
- 3.24 The difference between the motivations of families and non-families also indicates that the two types of visitor are looking for different aspects. Families with children are motivated to stay on a farm because it is good for children (36%) and because of the presence of animals (16%) and being in the heart of the country (16%). By contrast, adult only holiday groups are particularly motivated by being in the heart of the country (27%), the warmth of welcome (23%) and relaxing (19%).
- 3.25 Motivations for staying on a farm differed by age of respondent. Older enquirers were much more likely to be motivated by warmth of welcome, being in the heart of the country and relaxing, while younger age groups were more motivated by animals on the farm and farms being good for children.
- 3.26 The differences between the general and farm enquirers suggest that within the broad similarities in the motivations for visiting a farm, the important differences are that while farms are a guaranteed route to the countryside for the general visitor, offering a relaxing experience, for those seeking a farm experience it is the friendliness that is the main motivation.

- 3.27 The focus groups provided further insights into the perceptions about staying on a farm:
 - ?? While the younger families did not spontaneously mention staying on a farm during discussions about accommodation for countryside holidays, they did respond enthusiastically. Farm-based holidays were considered enjoyable, value for money and educational, although they could also be hard work. They felt that their children would enjoy staying on a farm and that it would be a wholly different sort of holiday.

"(It was) more of a working holiday...but we would go again"

"You were woken really early by the cockerel. There was no sleeping in."

- ?? The younger families did not want to go too far with their involvement with the farm way of life if it turned out to be more work than relaxation. They were also very aware of potential dangers such as ponds and machinery, and that there was also the risk that their children might damage something.
- ?? The younger families and older groups both perceived that a farm welcome would surpass other accommodation, and that the cooking (for serviced accommodation) would be good. However both groups felt that the slow pace of rural life and tranquillity were not the sole preserve of farms and could be found elsewhere in the countryside. Moreover, these attributes may not necessarily be true of modern farming life given the recent high profile problems in agriculture.
- ?? The younger families and older groups both had split views on the desired level of integration with the farming family as opposed to being accommodated separately on farm premises. Conflicting elements included enjoying the welcome, cooking and education, against the requirement for space, privacy and freedom to do one's own thing.
- ?? The older group saw farm holidays as primarily for young families, although the older group would still consider it now. They were more interested in taking part in some aspects of farm life if they felt like doing so at the time, and they liked that idea that staying on a farm might give them a better insight into country life and traditions.
- ?? The older group were not particularly keen on mixing with young families on holiday, preferring instead to seek peace and quiet.
- ?? All the focus group respondents preferred a farm to hold livestock, and would expect a farm holiday to include some contact with animals. Animals were an important learning element for children and offered interest for the older group.

"It is nice, even now, to see lambing and milking and those things"

?? An intrinsic part of staying in farm Bed and Breakfast is enjoyment of ample portions of homemade food using fresh local produce, including fresh fish.

The Farm Experience

- 3.28 Consultations indicate that in the past there has been a traditional split between work and leisure, with holidays providing the means to escape from the work environment. However in a post-industrial society experience of seeing people work is of interest. Farm tourism provides people with the experience of another industry, and offers a link with historic practices.
- 3.29 Within the desire to see people work is the acceptance of a sanitised version and a particular interest in farm animals. However there is evidence that not all rural visitors are looking for these farm experiences, and that there is likely to be a wider interest in marked paths around farmland with interpretation.

Access to the Coast

3.30 While focus group members enthused about countryside based holidays in the South West, both the younger and older age said that they preferred to take countryside holidays with access to the sea. Few wanted to be in really remote rural areas without access to the coast or interesting towns. In particular young families required a clean, safe and child-friendly coastline within a short drive.

"It is nice to be away from it all but still have everything accessible if you want it."

- 3.31 There are mixed views about access to the coast from those contacted as part of the telephone survey. 25% viewed easy access as very important, 22% as quite important and 53% as not important. Within the different types of enquirer, general enquirers were more likely to be interested in the coast (29% stating it was very important compared to 17% of farm enquirers). For those who stated that easy access to the coast was very or quite important, those interested in farm holidays had a longer average maximum journey time to the coast (44 minutes compared to 36 minutes for general enquirers).
- 3.32 Families with children are much more likely to view access to the coast as important than adult-only groups (49% considering it as very important compared to 22% of the adult groups), with a correspondingly lower maximum travel time to the coast.
- 3.33 The 35-44 year olds were the age group most interested in access to the coast, followed by the 16-24 year olds.
- 3.34 The consultations confirmed the importance of the coast for visitors to much of the region.

Comparison with Other Destinations

3.35 The focus groups indicated that countryside holidays delivered relaxation and escape from the stresses of normal life. By comparison, coast and town destinations were perceived as more hectic, suitable for a day out, while it was the countryside that was more certain to provide peace and quiet.

"It is nice to stay in the country and have the town nearby, so you can dip in and then opt out again"

- "The coast gets too busy for me. I have to fight the crowds in Windsor so like to keep away from the tourist places like popular seaside resorts and towns; so the countryside suits me."
- 3.36 The countryside was also valued for its easier access to a more traditional way of life and for a variety of scenery and walks compared to towns and resorts.
- 3.37 The countryside in the South West benefited from the perception that the whole region had better weather than the rest of the UK. It was also perceived as accessible. Competitor UK countryside destinations were Wales, Cumbria/Lake District and Scotland, but most of the focus group members felt that the South West was the preferred destination.
- 3.38 However the South West fared less well in comparison to countryside destinations in France or Italy. These locations were particularly attractive because of the climate and, less importantly, experiencing a different culture. France was perceived as more child friendly and with better food. Nonetheless, the South West was considered more accessible and more practical because:

"Jumping in the car and being there in a couple of hours would override other things"

""Only if you have the money to spend on flights...can you get to France in the same time....but it's still not as easy"

Propensity to Visit

3.39 The focus groups reiterated issues about what constitutes the South West, and this should be noted when considering the findings. The counties with the strongest associations with the South West are Devon, Cornwall and Dorset. Associations with the South West diminish for counties to the east and north. These findings reinforce earlier focus group work such as the *Brand Map Research* (2000, South West Tourism).

Visits to the Region

- 3.40 The telephone research showed that amongst those who are interested in holidaying in the West Country either in the countryside generally or specifically on farms, most (93%) have visited the region in the past with over two thirds having taken at least one trip in the last five years. Younger age groups were less likely to have visited than older age groups.
- 3.41 Amongst the focus group members, the region was considered a popular destination for holidays or short breaks generally, although those interested in the longer holidays were typically the younger members considering the coast. The groups confirmed the familiarity with the South West and an inclination to return for further holidays.

"As long as we continue to enjoy it, I don't have a problem with visiting the same place twice."

Destination Types and Counties

- 3.42 The major reason to visit the region for the focus group members was the mix of countryside and the coast. Without the coast, many (especially those with children) could not easily see any county as offering long holiday potential.
- 3.43 Both Wiltshire and Gloucestershire were often felt to be 'too inland' for a holiday destination with little association with the South West. Instead, they did offer short break or day visit potential.
- 3.44 Somerset had a greater association with the South West than Gloucestershire and Wiltshire although for these focus groups, the historic towns of Bath and Wells featured more strongly than the Somerset countryside.
- 3.45 Within the focus groups, almost all agreed that a South West countryside holiday was really for a short break, with a maximum duration of about a week. Younger families would consider staying longer but only with particularly easy access to the coast. Countryside trips to Wiltshire, Gloucestershire and Somerset would typically be for a shorter duration than those further west, to a maximum of just two to three nights.
- 3.46 The focus groups viewed the South West (particularly Devon and Cornwall) as having better weather than the rest of the UK, and this was seen to be a substantial reason to visit. While poor weather might spoil a holiday, most agreed that there was plenty to see and do in the region in the event of wet weather, although there were reservations about everything being open throughout the year.

Countryside Holidays

- 3.47 The telephone research indicated that while almost all had visited the South West before, a lesser proportion (61%) had taken a holiday or short break anywhere in the UK countryside before. For those who had taken a countryside trip anywhere in the UK, 73% of the general countryside enquirers and 64% of the farm holiday enquirers had taken at least one of these trips in the West Country. For those who had not stayed in the West Country countryside, most (80% of general enquirers and 88% of farm enquirers) would consider staying in the countryside in the region.
- 3.48 The focus groups indicated that although access to the coast and to towns was important, there was a preference for accommodation to be based rurally and then to travel to the coast or the town, rather than vice versa. Relaxation at the end of the day was felt to be the prime consideration in this regard.

You want to know that you can leave the town behind in the evening and have a really quiet peaceful night."

Countryside Holidays in the South West

3.49 While there was no difference between the proportions of families with children and adult-only groups who had taken a holiday in the UK countryside, adult-only groups were much more likely to have taken a holiday in the West Country countryside (72% compared to 45% of the family groups). Although most

- of those who had not taken a holiday or short break in the West Country countryside would consider it in the future, the adult only groups were keener than the family groups.
- 3.50 This suggests that the interest for general inland holidays is coming from within those who already visit one of the destination types within the region, rather than the region necessarily capturing countryside holidays from elsewhere. On the other hand, the farm holiday product is more likely to be attracting interest from new visitors. In terms of group type, the general rural holiday product is of more interest to adult groups than families.
- 3.51 Overall propensity to visit is indicated by UKTS. In 1999 22% of the region's 19.1 million UK resident trips were to countryside locations (i.e. 4.2 million trips), a figure which has been growing since the mid 1990's. Further UKTS figures are detailed in the desk study section of this report. These UKTS figures can be combined with the telephone research data to give some indicative figures about the size of the farm tourism market relative to the overall rural tourism market. If the general West Country inland holiday enquirer can be taken to be representative of overall rural visitors quantified by UKTS, then 31% of the rural visitors would choose some form of farm-based accommodation 1.3 million trips. Of the 69% who did not choose a farm based accommodation, 54% indicated that they would not consider staying on a farm i.e. 37% of the rural tourism market.

Propensity of the Rural Tourism Market to Stay on a Farm

Sub-sector	% of West Country Rural Tourism Market	
Actively wishes to stay on a farm	31%	
No definitive preference	32%	
Actively avoids staying on a farm	37%	

Source: UKTS 2000 and telephone research undertaken as part of this study

3.52 While these figures provide a useful indicative guide, they would benefit from further testing, along with a mechanism to apply them to the overseas market.

Seasonality

- 3.53 Those taking part in the telephone research were asked about their interest in off-season short breaks and holidays in the West Country countryside. 51% indicated that they were interested in an off-season holiday and 85% indicated that they were interested in an off-season short break. In the context of the more general growth in short breaks across the region this is unsurprising, although it does indicate that the countryside has a role to play in receiving off-peak short breaks as well as the other destination types in the South West.
- In terms of off-peak trips, those interested in farm holidays are more likely to be interested in off-season short breaks and particularly off-season holidays than those interested in general countryside holidays (87% of farm visitors compared to 84% of general visitors for short breaks and 57% compared to 47% respectively for holidays). Families were less interested in off-season holidays and short breaks than adult groups, which may partly reflect the difficulty of taking children out of school during the term time.
- 3.55 While interest in out of season holidays is stronger amongst the older groups, interest in out of season short breaks is strong across all age groups.

- 3.56 The focus groups illustrated the different issues affecting out of season trips for the younger families and the older groups.
 - ?? Younger families felt restricted to taking their holidays during the school closures, although most felt that a short break of up to three days could be taken at will. The advantages of trips out of season included educational opportunities (e.g. seeing lambing), quieter resorts log fires and especially lower prices. There was concern about the South West's overall suitability as a winter destination, with a lack of things open in the winter. Some of the younger families could envisage a winter or late autumn break in the South West if they felt satisfied that there would be things for the children to do.
 - ?? The older group actively preferred to visit the South West outside the school holidays in order to take advantage of lower prices and fewer crowds, although there was recognition that this might miss out on some of the summer events such as county shows. Some of the older group indicated that they might be lured by off-peak special interest packages such as murder mystery weekends or turkey and tinsel. Christmas markets would also be of interest. The older group agreed that an all-in package would be a safe and appealing option.
 - ?? The focus groups felt that the current marketing of the South West is geared to peak season visits.
- 3.57 Consultations indicated that the seasonality of visits with a summer peak was gradually changing with, for example, the February and autumn half-terms easier for accommodation providers to fill, and Christmas becoming one of the peak times of the year for some operators.
- 3.58 The reasons attributed to the better distribution of visitors throughout the year extend beyond rural or farm tourism influence and include the impact of road infrastructure improvements (making short breaks more attractive), and wider changes in the pattern of holiday taking (such as more, shorter trips).
- 3.59 Further extensions to the season may be discouraged by the extra costs incurred in attracting visitors, combined with the lower achievable rates. For self-catering operators, there is the added potential of long winter lets further discouraging some from chasing the low season market. For those who have been pursuing winter visitors, messages that have proven successful have utilised empty beaches and log fires imagery.
- 3.60 The consultations also indicated that the operators best placed to push out the length of the season are those who have larger establishments with year-round facilities, and who are able to spread their marketing costs across a larger number of units or bedspaces.

Accommodation

3.61 The telephone research indicated the preferred accommodation type for staying in the countryside was in a hotel or guesthouse (34%). However twice as many farm enquirers as general countryside enquirers were interested in staying in a farm Bed and Breakfast (36% against 18%).

- 3.62 As well as the differences between the countryside and farm enquirers, there are similarities too. For example, while 37% of the general countryside enquirers were interested in hotels or guesthouses, this type of accommodation was also of interest to those enquiring about farm holidays (30%). The similarities are even more marked for farm self-catering, with 12% of general enquirers and 15% of farm holiday enquirers citing it as their preferred form of accommodation.
- 3.63 The preferred accommodation type for families was farm and non-farm self-catering, and non-farm camping/caravanning. By contrast, adult-only groups preferred hotels/guesthouses and farm Bed and Breakfasts.
- The younger age groups displayed the highest interest in the farm Bed and Breakfast, and in non-farm self-catering. Older age groups were more likely to prefer hotels/guesthouses.
- For those who stated a non-farm accommodation type as their preference, 53% overall said that they would consider staying on a farm, although this differed considerably between countryside and farm enquirers (46% and 72% respectively) and between families and adults (80% and 51% respectively), and by age (younger age groups more enthusiastic than older).
- 3.66 The pattern of differences and similarities suggest that some of those enquiring about farm holidays are interested in a broad countryside experience, which may or may not be on a farm particularly in the self-catering sector. There is then another group who are enquiring about specific farm experiences, typified by those who have farm Bed and Breakfast as their preferred accommodation type. The important element to note is that not all those who are enquiring about farm holidays are looking for the specific farm experience, but may be viewing farms as a route to the desired broad countryside experience. The split between those seeking farms and those seeking general rural experiences is not fully explained by a family/adult breakdown although there are indications that families and adults are looking for different attributes from a farm based holiday. Consultations reinforced these views, and suggested that for some of those seeking a countryside experience, the 'farm' label on accommodation guaranteed a rural location.
- 3.67 The older and younger focus groups reinforced some of the different accommodation preferences.
 - ?? The younger families invariably preferred some form of self-catering accommodation, normally a chalet or a cottage or, less frequently, a caravan. There was agreement that staying in hotels was difficult with children because of perceived less flexibility and freedom to come and go as they pleased. There was also concern that the children would break something and the feeling that some Bed and Breakfasts would require guests to leave the premises during the day, and that self-catering avoided the embarrassment of children not eating the food served. Access to evening entertainment was also important, either in relation for the adults when the children were sleeping, or for entertaining older children (younger children being easy to entertain with games etc. brought from home). The combination of self-catering freedom and access to facilities led to a preference for complexes of some kind, where there would be a choice of facilities such as swimming pools and entertainment along with self-catering units. Complexes also offered the likelihood that there would be other children to play with.

- ?? Child-friendly premises were important for the younger families, with all obvious dangers removed.
- ?? The younger families indicated that they would accept basic level accommodation for a countryside holiday, although a base level of comfort and high standards of cleanliness and friendliness were important.
- ?? The younger families focus group did not mention staying on a farm spontaneously.
- ?? The older focus group were more likely to choose Bed and Breakfast accommodation, and they also placed an emphasis on clean hygienic comfortable accommodation in the countryside without a necessity for luxuries. Some of this group had reservations about the comfort of beds in Bed and Breakfasts. However they felt that countryside accommodation need not necessarily be basic if luxury was required. Friendliness was paramount.
- ?? Facilities such as tea and coffee making facilities in their room were important to the older group, as were ensuite facilities. Some indicated that a TV would be preferable. A good standard of cooking was important, with an emphasis on fresh local ingredients.
- ?? The older group considered that Bed and Breakfasts were seen as appropriate accommodation for countryside areas, rather than hotel groups which offered a more artificial, less authentic experience.
- ?? The focus groups indicated that farm accommodation would be on a par or cheaper than other forms of accommodation.
- ?? There is an expectation that farm accommodation is presented in a traditional style rather than modern décor. Open fires were welcomed.
- 3.68 While the consultations broadly supported the self-catering of more interest to families and serviced accommodation of more interest to adults, there is a clear view that within the generalisations there is a more complex picture. The style in which accommodation is presented in for example destination guides or on websites will have a significant impact on the type of custom it receives. Clear reinforcement of child-orientated facilities will encourage families and discourage some adults, while others will make it clear that their offer is best suited for adult groups. For example, the Devon Farms guide for 2002 includes some Bed and Breakfasts clearly serving a family market.
- 3.69 The message from the consultations is that accommodation operators need to analyse what markets they are best placed to serve and then actively pursue them, rather than trying to be all things to all markets. This will include forming a view on whether visitors are seeking a farm or rural experience, and adapting marketing to suit.

Activities and Special Interest

3.70 Those taking part in the telephone survey indicated that the most important activity by far for a West Country countryside holiday or short break was walking (noted by 73%). This is followed by visiting

heritage and country homes (46%), visiting gardens (43%), relaxing (41%), visiting towns and villages (23%), visiting other attractions (21%) and visiting the coast (17%). Although there is interest in other activities such as cycling, fishing, golf, pony trekking and learning new skills, this is very much a minority interest (less than 10%).

- 3.71 Between the general holiday visitors and the farm holiday visitors, the main differences in terms of activities are that there is more interest in the some of the minority interests, although some of this extra interest is only slight. For example, while 10% of the farm enquirers were interested in cycling compared to 5% of general visitors, 3% of farm visitors were interested in pony trekking compared to 2% of general visitors.
- 3.72 Between the family and adult groups, the main differences are that families are much more likely to be interested in cycling (15% compared to 6% of adults), pony trekking (18% compared to 1%) and visiting the coast (39% compared to 14%). Adult groups were more likely to be relaxing (42% compared to 36% of families) and visiting heritage and country homes and gardens (46% compared to 42% and 43% compared to 39% respectively).
- 3.73 The younger age groups were more interested in energetic activities such as walking, cycling, pony trekking. Older age groups display more interest in relaxing or visiting heritage and country homes, although visiting gardens is fairly consistent across the board. Younger visitors are more likely to want to visit the coast.
- 3.74 60% indicated that they would be more likely to visit an area were activities where easily available. The people interested in general countryside holidays, families and younger age groups were more likely to be swayed by the presence of activities than those seeking farm holidays, adult only groups and older age groups.
- 3.75 The focus groups indicated that while both age groups wished to take part in some form of activity or interest while away, it was only the older group which had the any desire for dedicated 'special interest holidays'. Younger families were more inclined to build their holidays around their children's needs, but on a day to day rather than pre-booked basis. The older group suggested a set of activities they might like to undertake:
 - ?? Walking
 - ?? Swimming
 - ?? Cycling
 - ?? Fishing
 - ?? Dancing
 - ?? Putting/golf
 - ?? Skittles

- 3.76 The older group also identified a set of organised activities including:
 - ?? South West cookery
 - ?? Touring historical/National Trust sites
 - ?? Garden tours
 - ?? Painting holidays
- 3.77 The consultations indicated that while access to activities formed part of the motivation for taking a holiday or short break in a particular destination, generally it is not the central reason, and will be subservient to type and quality of accommodation etc.
- 3.78 Despite the numerically minor role that some activities may play in terms of use by visitors, they may still remain a powerful hook for marketing and PR work, which will often reinforce the attractive rural setting for many activities.
- 3.79 Activities will be important for those businesses seeking to use school and corporate events, while across the broader holiday market, organised activities can be regarded as a separate and smaller subsection. However, the singles market has been identified as a niche where activities may form the venue for social experiences. The majority of visitors will be seeking to participate in activities on an informal basis, and the effort of setting up activity-accommodation packages may take substantial effort (including compliance with the EU Package Travel Directive) with sometimes small return.
- 3.80 While walking and cycling activity operators will tend to be the best established and confident about the future, those offering other sorts of activities will often be having a less successful experience.

Conservation

- 3.81 81% of those interviewed by telephone indicated that they would be more likely to choose farms to stay on that were making efforts to preserve the environment. Those who were specifically interested in a farm holiday were more likely to see this as important than the general countryside visitor, and the importance was shared by families and younger age groups.
- 3.82 The focus groups painted a different picture of the importance of environmental or ethical concerns, with neither group showing any true awareness or concern about environmental or ethical issues that might affect their stay.

Local Facilities and Produce

Local Facilities

3.83 While there was agreement in the focus groups that it was appealing to have accommodation based in the countryside, younger respondents especially felt that they would use this as a base and not

necessarily spend all their time in the rural surroundings in the daytime. While these feelings were partially mirrored by the older focus group members, this group were more inclined to take fuller advantage of their immediate surroundings for walking, eating out etc. before exploring further. Proximity to towns was viewed as important for both groups as centres for browsing, shopping and in case of poor weather.

- 3.84 For those who took part in the telephone research, access to local facilities such as shops, restaurants and pubs when staying in the countryside is seen as very important by 48%, quite important by 31% and unimportant by 21%. Between the general and farm holiday enquirer there are noticeable differences, with the general holiday taker much more motivated by access to local facilities than those seeking farm holidays (54% of general enquirers stating access is very important compared to 37% of farm enquirers). There is little difference between family and adult groups on this issue, or by age group.
- 3.85 The focus groups indicated that there were distinctly different needs for the younger families with children compared to the older group.
- 3.86 The younger group with children viewed the following as important
 - ?? Swimming
 - ?? Child-friendly eating out
 - ?? Farms
 - ?? Child orientated activities such as cycle hire, parks, theme parks
 - ?? Castles/historical sites
 - ?? Towns and shopping
 - ?? Local markets
- 3.87 The younger group placed considerable emphasis on freedom and being allowed to do their own thing. The clear inference was that preferably access to facilities would be spontaneous, without the need for pre-arrangement or booking.
- 3.88 The older group viewed the following as important:
 - ?? Gardens
 - ?? Leisurely walks
 - ?? Craft centres
 - ?? Stately homes/National Trust and English Heritage properties

- ?? Historic Towns
- ?? Speciality shopping
- ?? Good local produce and 'homemade' foods
- ?? Mix of good eateries
- ?? Markets
- 3.89 Some of the older group also indicated that they desired entertainment, and ample car parking.
- 3.90 Public transport was not mentioned except as a challenging way to see the local area, while cycles were seen as an enjoyable option although respondents had reservations about using cycles for journeys of any length. Members of the older focus group were more likely to use cycle hire while the younger group were more likely to bring their own.
- 3.91 Shops in close proximity were important to the younger focus group with children for buying daily provisions. This is strongly related to the likelihood that this group would be staying in self-catering accommodation. Shops for browsing were less important to this age group than the older group, which particularly liked individual unusual shops reflecting local craft, although markets were appealing for both groups.

"We're just wanting to mooch...browse really leisurely"

Local Produce

- 3.92 54% viewed eating locally produced food when staying in the countryside as very important, 27% viewed it as quite important and 19% as not important.
- 3.93 Farm holiday enquirers were more likely to view this issue as important than general countryside enquirers (61% compared to 49%). Adult only groups were more interested in eating locally produced food than families. There is little difference between the different age groups.
- 3.94 There was also considerable interest in buying food from a farm shop, with 83% indicating that they would be interested (with little difference between the type of enquirer).

Bookability and Information

- 3.95 The focus groups explored the bookability and holiday information issues.
- 3.96 Both the younger families and the older group considered it straight-forward to source and book a countryside holiday in the South West, although amongst the older group was the recognition that it might require some effort to assemble the information.

- 3.97 Common sources of information included:
 - ?? Tourist Information Centres
 - ?? National press
 - ?? National magazines

"The Lady magazine is a good source of ads for farmhouses and cottages."

"You see lots of advertising in the broadsheets. The Sunday papers especially are good, for supplements"

"You can either ring them (TIC) in your area, or the area you are travelling to...both are just as helpful"

- 3.98 The Internet was also a significant way of sourcing information on holidays in the UK, by both age groups. However, access to the Internet was not universal and there was some reticence to actually making a booking. Instead both age groups stated a preference to receive printed material and talk to proprietors, and then make a postal booking. The process of talking to proprietors was used to confirm the warmth of welcome and to give some clue to the style of operation, and was the process whereby an inquiry was turned into a booking.
- 3.99 Despite the reservations about using the Internet for actual booking, there was general agreement on the importance of this medium. The Internet was also used for sourcing overseas holidays.
 - "Farms and countryside accommodation will have to be on the net, there's no two ways about it."
- 3.100 The older group also used other non high-street publications such as those from the National Trust and the Royal Horticultural Society.
- 3.101 Suggested new ways of promoting countryside accommodation involved the Internet for younger people and advertising and PR for older people. There was recognition that many establishments were undertaking individual marketing and that they might be able to present a stronger message by joining with others.
 - "There are an awful lot of farms and guesthouses all advertising separately. Maybe if they all got more co-ordinated and bought more space."

Visitor Attractions

3.102 Visitor attractions can be divided into those that can be termed regionally significant – those that have a high enough profile to generate new visits to the region – and those which form part of the visitor experience post arrival (although they may also be part of the pre-trip reassurance that there will be enough to see and do on holiday). In the main, farm attractions are not regionally significant.

Appeal

- 3.103 The consultations emphasise the important role that animals play in farm-based attractions, although this importance may be disproportionate to the amount of time that visitors spend with them. While visitors will want some kind of farm experience with animals, they are looking for a sanitised version, reinforcing the rural idyll imagery. Activities like lamb feeding fit this aspiration well.
- 3.104 In broad terms, farm attractions have maintained their core farm experience and added to it with a range of other things to see and do. These will typically be wet weather child orientated facilities and catering, often with significant levels of investment. The net effect has generally been to move the attraction away from its purely agricultural routes, with the original farm elements becoming relatively less important.

Day Visit Market

- 3.105 The consultations also indicate the potential for further development of the day visitor from home market as having potential for farm attractions in the South West. Evidence such as the success of membership schemes shows how repeat visits from home can be built up, with consultees emphasising the importance of developing other parts of the offering to increase the attractiveness of repeat visits. This has often included the provision of indoor children's play areas, which provide venues for children to utilise their own games and imagination as well as the stimulus offered by the attraction.
- 3.106 Increasing day visits from home can also be achieved by events, and by providing a venue for parties. There are also opportunities for farm attractions through consideration of their role in the wider leisure related sector. Examples cited include extension of the core farm attraction provision to include food sales, coffee shop, pottery, fishing, cycle route, internet café/networked computer games, trails etc. While some of this investment will provide increase the attractiveness to the visitor staying away from home, others will be specifically orientated to day visitors.

Conclusions

- 3.107 There is evidence that farm tourism lies within the overall market for countryside tourism. The main holiday choice factors are location, the broad accommodation type and the price/quality relationship. Within the broad countryside tourism market, there are three subsections:
 - ?? The largest section comprises people who seek a broad countryside experience. The motivations are relaxation, some access to the countryside for informal recreation (generally walking) and within striking distance of interesting towns and other things to see and do. There is also some interest in access to the coast.
 - ?? The second section is the group who are particularly interested in the farm tourism product. For these people, the farm-based opportunities substitute (at least in part) for access to the coast or other things to see and do in the countryside.

- ?? The third section is a group that are averse to the farm experience, fearing noise, mud, smells, and agri-industrial danger. This group will be put off by suggestions that accommodation is an integral part of a working farm, although they may stay on farms if they can be satisfied that their accommodation is separate from the farm.
- 3.108 Farm accommodation visitors are more likely to be swayed by conservation/sustainability issues than the general countryside visitor.
- 3.109 Farm accommodation visitors are less orientated towards South West's dominant coast brand than the general countryside visitor.
- 3.110 While there is considerable interest in off-peak countryside short breaks across the board, and a lesser interest in off-peak countryside holidays, those interested in farm holidays have a higher than average interest in off-peak trips. This indicates that farm tourism may be one particular way to address seasonality of trips in the region, although the countryside as a general destination type has appeal for off-peak trips. Adults travelling without children are likely to be a more fertile market than families, although it may be worth re-assessing this if the discussed changes to the school holidays take place.
- 3.111 Walking remains the most popular countryside activity by far. There is some indication that those seeking farm holidays may be more interested in some of the other outdoor activities than those seeking general countryside holidays, but the differential is small. Based on these findings, providing well thought out walking access may be the best way forward for farmers and others managing the countryside, although the PR opportunities for provision of other facilities may provide benefits that are out of proportion to their actual usage. Families are interested in cycling and pony trekking and are more likely to choose a destination when activities are easily available.
- 3.112 The common theme throughout the consultations, and also reflected in the visitor research, is the central role played by the environment in the South West in attracting visitors to the region. A major part of the broader environment will be the managed rural landscape. As such, the core demand issue is how to use this asset more effectively to attract visitors and provide expenditure opportunities. While the bulk of the demand may be countryside based, much of the rural landscape is in the stewardship of farmers and the prosperity of this sector is directly related to the resources used to conserve the rural landscape. Therefore a successful rural tourism approach will involve a mechanism to link the expenditure by those responsible for the landscape with those businesses benefiting from it. Realistically this will require some form of third party intervention, and current government initiatives (such as Countryside Stewardship schemes, ESA payments and Farm Woodland schemes) and CAP reform at least partly address the issue.

4 DEVELOPMENT OF FARM AND RURAL TOURISM

Introduction

4.1 The research process has generated a series of issues relating to the development of farm and rural tourism, and these are discussed in this section.

New Accommodation Development

- 4.2 In terms of future product development, the consultation views include:
 - ?? The view that new bedspace provision should not be encouraged unless there is proven demand.
 - ?? That there is demand for self-catering apartments in complexes with views and high quality facilities, presented in a contemporary style, and with the availability of a serviced element (such as a restaurant). Current examples are in coastal locations but there is potential for development in rural locations, with the right views.
 - ?? There is demand for self-catering properties that can accommodate large groups (say up to 15 people). However, these sorts of properties compete on a national basis, with availability of suitable accommodation at least as much of an issue as destination region. Development of such accommodation provides the potential to attract new visitors to the region. However, these sorts of properties require good access and experience suggests that the east of the region is better suited than the far west. An alternative to the single big property would be a set of smaller properties in a complex with a communal area.
 - ?? There may also be a market for even larger groups say up to 40 people and while the principles are the same as the market for up to 15 people, the number of bookings may be relatively small.
 - ?? The strongest demand for most rural self-catering properties is for those with access to an indoor pool, equipped to four or five star standard, have a secure garden (for children and pets), a telephone (as many rural areas still have poor mobile telephone signals) and a wood burner. The properties should be within walking distance of a good local pub and be within an easy journey to the coast.
- 4.3 The emphasis on self-catering for new product development relates to the perceived visitor requirement for freedom and space. It also partly relates to similar requirements for farmers and their families, as well as better allowing members of the farming family to pursue off-farm employment instead of being tied in to serviced accommodation arrangements.
- It is clear from the consultations that there will be continued rising quality in self-catering. Ensuite facilities for master bedrooms are likely to become more important, and the future may also see the expectation of computers for emails, the Internet and games.

- The consultations also point to the role of the country house hotel. This sort of accommodation, presented with character and a good restaurant offer a rural tourism product that is specifically non-farm, and can be an ambassador for local produce. The high service element provides the opportunity for local employment.
- 4.6 Consultations noted the success of horse Bed and Breakfast in the North East of England. This involved a network of farm Bed and Breakfasts grouped in an area suitable for riding, with accommodation for animals and riders. While the venture worked for these businesses, it is noted that there can be substantial work involved in setting these networks up. The horse Bed and Breakfast scheme is not necessarily suitable for replication in the South West, but it does point the way for the potential of new ideas with the right circumstances and a network of co-operative businesses.

Visitor Attraction Development

- 4.7 In comparison with the substantial growth in farm-based attractions noted in the early 1990's, it is now apparent from consultations that the rate of new development has slowed considerably and there is little evidence emerging from the consultations of the problem of copycat farm attractions.
- It is the view of the consultees that there is little obvious scope for new farm attractions in most parts of the region. Additionally, the majority of the farm attractions that have survived have continued to invest in their offer to visitors, and that this movement has been in tandem with visitor expectations. As a result there are now substantial barriers to entry, which is likely to restrain the potential new entrant.
- There is some evidence that specific events in the farming calendar may offer some farms the opportunity to temporarily open their gates to visitors. Lambing could be one such event, although imagination could produce a variety of others. However, exploration of this route requires careful consideration about the time and financial resources required to make temporary use of the farm in this way, balanced against the likely visitor numbers. Although the farm may be temporarily open it will still require parking, toilets, safety provision etc.
- 4.10 One of the ideas emerging from the consultations is that of opening farm gardens, which makes use of current interest in gardens. The scale of such activity would need to relate to the gardens in question, and could range from inclusion in the locally based open garden schemes common in many locations in the summer months to larger networks of farm gardens. Such schemes may work best when combined with other visitor offerings, such as sale of produce or farm trails.
- 4.11 There is also potential for farms to make use of the space at their disposal to host temporary exhibitions, sculpture parks and events. The key to making this work will be the establishment of relationships and networks to put exhibitions in touch with farmers and facilitate the necessary marketing and operational arrangements.
- 4.12 One temporary exhibition idea are the 'Mazes out of maize', which see mazes created out of double planted fields of maize. These schemes have the benefit of leaving more of the value added with the farmer as well as the ability to produce a commercial crop at the end of the season. This will not work in

all circumstances and indeed, over-provision would saturate any interest. However it demonstrates an imaginative use of farmers' unique assets, and offers a spur to create more ideas.

Economic Benefit

Embeddedness

- 4.13 The extent that farm and rural tourism activities provide an economic benefit will depend on the degree of embeddedness in the local economy, as defined by:
 - ?? Use of locally-sourced produce
 - ?? Sourcing of capital purchases locally
 - ?? Employment
- The view from the consultations is that tourism businesses generally can be reasonable at using local produce, generally poor at sourcing capital projects locally and good at providing positive employment economic benefits (small scale businesses employing local people rather than using migrant labour). Rural tourism businesses are not seen as markedly different in this respect from tourism businesses in other destination types, although farm tourism businesses are likely to bring benefits in terms of employment for farming families, helping to maintain the viability of the whole farm.
- 4.15 It is considered by the consultees that there are particular opportunities to improve the sourcing of local produce by tourism businesses, although this is an issue wider than rural or farm tourism.

Provision of Information

- 4.16 The consultations indicate that provision of information offers the easiest way to increase spend by visitors in rural areas, through the retention and increased circulation of visitors in the local economy. Information on what to see and do, including suitable shops, pubs and restaurants will position spending money with local businesses as an enhancement of the holiday experience. This view builds upon the broader role of shopping as a leisure pursuit.
- 4.17 The information can also link to cross sector promotions, such as the Dartmoor Tourist Association trails leaflets picking up accommodation, pubs, tea rooms; or the Dartmoor Area Tourism Initiative's Clock Towers and Cobblestones leaflet encouraging visitors to visit market towns away from the honeypot Dartmoor locations. Other cross sector promotions will include events (such as the Two Moors music festival in rural churches) which work at their best when event attendees have information about the catering, accommodation and any other facilities that may be of interest.
- 4.18 Other ways in which information can be used to build economic benefits includes the use of referral networks, such as the Farm Stay network and the plethora of locally based networks.

Local Produce

- 4.19 Supply of local produce is viewed by the consultees as a vehicle for increasing the economic benefit of tourism as well as a way of enhancing the visitor experience. There is also a view that the PR value of local produce is greater than its current direct economic impact to producers in the region, although there will be some individual businesses to whom the supply of local produce to visitors is important (either direct supply or through wholesalers).
- 4.20 There is also evidence from the consultees that while research may point to the desire for high quality local produce by staying visitors, it can still be difficult to translate this into viable business demand. Nonetheless, farm shops are identified as an area able to support further growth.

Seasonality

4.21 Efforts to spread the season through investment in facilities will produce economic benefits through better utilisation of resources and better employment viability – i.e. through out the year rather than seasonal. Further discussion on seasonality issues can be found in the *Propensity to Visit* sub-section in section three of this report.

Non-market facilities

- 4.22 Some of the assets that farms may be able to use for visitors will not be able to generate a realistic return by themselves, such as providing farm trails etc. There is a case for public support for provision of these facilities, and while this is available in parts of the region (such as the Rural Access Grant in Cornwall), much of the region is without such assistance.
- 4.23 Some of the non-market facilities such as trails may sit well with changing patterns of agriculture such as woodland, or coppicing for bio-fuels. Support for farmers entering new forms of agriculture would be of most economic benefit if dual uses such as tourism are considered.

Planning

- 4.24 There is a reported inconsistent approach by planning authorities, with some much more accommodating of new development in rural areas than others. There is a view that planning authorities need to acknowledge that tourism is the principal rural economic activity, and that development proposals should be considered in their own right as opposed to being subject to blanket policies.
- 4.25 Despite the desire for a more flexible planning system, there remains widespread support for making minimal changes to the overall appearance of rural areas, based on evidence such as the Cornwall Holiday Survey, which has consistently shown that visitors do not want the character of the area to change. It is recognised that the planning system has played a significant role in preserving the character of rural areas.

- 4.26 The consultations indicate that a non-confrontational approach to an informed planning authority based on an ongoing dialogue will generally result in a suitable decision being made. While the applicant will be responsible for some of these elements, overall impartial guidance will need to be provided by a third party. There is a role for bodies such as South West Tourism in providing some of this guidance to planning authorities to supplement national planning guidance (currently PPG21 and due to be replaced by sector specific best practice guides), as well as providing advice to tourism businesses on understanding and using the planning system.
- 4.27 One of the planning issues relates to the dynamism of the market for self-catering. Early self-catering complex developments may now be approaching the end of their useful life and will need to be taken out of service, and replaced by more suitable facilities. This dynamism needs to be recognised by planning authorities and viewed as a positive change. It may be that some of the existing provision of facilities that are no longer suitable for the competitive holiday market could be redeveloped as rural housing although this will require any year-round occupancy planning restrictions to be lifted.

Conservation

- 4.28 The consultations indicated that conservation issues were likely to be a low priority for visitors when choosing where to stay, although sustainable practices could provide business benefits (e.g. cost reduction through energy efficiency, ease of recruitment or acceptance of planning permission through good community relations etc.).
- 4.29 While there may be little direct impact of conservation activities in terms of attracting visitors, there is a strong link between the way in which the countryside is managed and the overall attractiveness of the region to visitors. However, this is an indirect relationship at an individual farm level.
- 4.30 Visitor payback schemes are considered too intrusive for current visitor attitudes although there have been some successful schemes in the UK. Instead, a more powerful message may relate to the visitor benefits from staying in the well-managed landscape, reflecting the underlying tradition of good husbandry of the resource.
- 4.31 South West Tourism experience shows that farm tourism projects are generally good at addressing sustainability issues, with active countryside stewardship and high levels of local purchasing. As such many of these projects would fit in well with the national sustainable tourism accreditation scheme being developed by the English Tourism Council and the Countryside Agency.

Reaching the Customer

Branding

- 4.32 The consultations showed the weaknesses of reliance on a South West regional brand for marketing rural or farm holidays. The issues include
 - ?? The strong association of the South West with Devon and Cornwall, and the diminishing association for the north east of the region.
 - ?? The strong individual Devon and Cornwall brands.
 - ?? Cornwall's lack of a rural image, while both Devon and Dorset and Somerset have strong rural images.
 - ?? The strong individual brands such as the Cotswolds, or Exmoor; and the relative lack of branding for parts of central Devon.
 - ?? The widespread acknowledgement that specific local areas do not constitute brands in most potential visitors' minds.
 - ?? Duplication of efforts and resources put into building or supporting tourism brands in the South West
- 4.33 Discussion about the implication of using geographic sub-regional brands for farm or rural tourism is entwined with the wider tourism branding issues in the region, and it is suggested that the principals from the wider debate are established before geographical farm or rural tourism branding is pursued. Insofar as there is a consensus, it is likely that the most successful way forward will involve a limited set of sub-regional brands generally covering at least county areas but will only relate to political boundaries when they have some brand values. There will also need to be consideration of how the South West rural tourism branding fits into emerging national rural tourism brands. Whatever the outcome, there will need to be acknowledgement that rural and farm tourism branding will have to play a different role in different parts of the region e.g. the changing proportion of day and staying visits in Gloucestershire compared to Cornwall.
- 4.34 Aside from geography, there is a consistent view from the consultations that there is enough distinctiveness and individuality about the rural and farm tourism product to build a distinct brand, probably linked to the sub-regional brand(s). There are also strong but not unanimous views that the farm brand should be part of the countryside brand, with farms providing a way to have a good countryside trip. This encompasses the different level of interest in farm experiences by those who may stay on a farm.
- 4.35 Significant marketing influence is wielded by other organisations, particularly larger self-catering agencies. Discussions regarding branding will have to be inclusive in order to ensure that the branding

- solutions are acceptable and useful to the range of organisations affected, and a wide adoption of consistent branding will increase effectiveness.
- 4.36 Some of the consultations indicated that farms should be bolder about deciding whether they should be in the farm experience niche or in the countryside experience niche. This needs to be balanced against the view that for many farms, neither market alone will provide the necessary level of business, so it remains necessary for businesses to consider both.
- 4.37 The consultations indicated that there may be a special role for larger rural tourism businesses in terms of profile and ability to add to the branding of the wider area. There may then be a case for particular support for a number of flagship rural tourism businesses that can create a larger market for the rest of rural tourism businesses.

Umbrella Organisations

- 4.38 Consultations indicated that umbrella organisations (such as Tourist Boards, Farm Stay, Cartwheel etc.) are a useful part of the way that businesses reach their customers. Issues relating to umbrella organisations include:
 - ?? The requirement that umbrella organisations work together in a pragmatic manner, pooling resources for the benefit of their members, and building partnerships to best access funding opportunities.
 - ?? The provision of booking systems has been shown to work (for example the service used by Devon Farms) and there may be the opportunity to extend these sorts of facilities. However, the Devon Farms example is built upon a small scale network based on knowledge of the farms and makes use of the warmth of welcome sought by visitors to farms. This may be difficult to replicate on a larger scale.
 - ?? Umbrella organisations will provide the Internet portals (and marketing support for these portals) for channelling potential visitors to the relevant business.
 - ?? Umbrella organisations will also provide business advice, training and market intelligence to individual businesses. This will alleviate any problems of farmers lack of experience in the customer focussed tourismmarket and marketing generally.
- 4.39 This situation is changing as some Local Authorities are withdrawing from parts of their destination marketing role. This is creating room for local tourism networks but may also lead to the further duplication of efforts and resources.
- 4.40 There is also a view amongst some consultees that the balance of effort across the region is not equal, and that particular attention should be given to establish a level playing field.

Individual Business Marketing

- 4.41 Consultations indicate that continued attention should be given to using the Internet as a marketing tool, with some tourism businesses reporting 75% of their business coming through the Internet. Use of the Internet should include a good set of links in order to ensure that people who may be interested in what they have to offer are directed towards them. Links will include local destination/Local Authority sites, Farm Stay, Regional Tourist Boards etc. Such links should be two way, with businesses feeding enquirers through to the motivational elements of the portal sites.
- 4.42 As well as the links, there is a view that many businesses do not yet fully exploit the potential of the web, particularly in the provision of visual images and building the reasons for potential visitors to book with them. The consultations indicate that while there will be some visitors who will be attracted by a 'home made' style of marketing, there will be a larger group who will be looking for the reassurance provided by a professionally presented offer.
- 4.43 In addition to use of new technologies, there still remains a place for print work. Consultations suggest that businesses should consider destination guides.
- 4.44 Accommodation businesses should actively seek to work with events, and consider ways in which their offering can be easily tailored to link with the theme of the event or through adding value/special offers.
 The consultations also indicate that business' marketing should also include flexibility such as two night breaks instead of three, or attractive single occupancy rates.
- Irrespective of the medium used, the quality of the operator's response will have a substantial impact in changing enquiries into sales. The key elements will be the speed of response, the style in which it is delivered and the substance of what it contains. Inadequate responses at this stage will render the investment in generating the response in the first place useless.
- The consultations provide the view that the marketing success of individual businesses will bear a direct relationship with the effort put in. This will include efforts in building up a set of contacts of previous guests, communicating with them about special offers, good times of the year to visit, changes to the website, etc. It will also reflect the effort put into building up referral networks.

Training and Business Support

Training

4.47 Consultations indicate that the best take up of training for farm-based tourism businesses has been when delivery has been through peer group organisations. The success has been attributed to the expectation that the information will be sector specific and delivered in an appropriate style at a suitable level. These benefits can extend to training delivered by a third party but carrying some kind of endorsement or involvement of the peer group – such as the South West Tourism quality awareness days delivered in conjunction with Devon Farms to members.

- 4.48 The underlying view is that 'one size fits all' approach is not appropriate for training if significant penetration is sought. Indeed, some of the work that has been done includes one to one training, particularly for start-ups. While this is an expensive process and requires both agriculture and tourism skills, it is viewed as providing sound tourism businesses with the attendant visitor and economic benefits.
- 4.49 Part of a one to one approach includes dissuading those whose circumstances may be unsuited to operating a tourism business. Consultations indicate that support for tourism diversification may only be appropriate for some farms, and that financial systems to support the wider set of farms to maintain the rural landscape will be a better solution for some farms. There is evidence that the successful farm diversifiers are also the successful farmers i.e. that diversification from strength has a greater chance than diversification from weakness. There is also evidence from the consultations that farmers may start diversification projects without a clear idea of a demand for the facility.
- 4.50 A set of development guides has been produced by South West Tourism (the 'Weighing up the Opportunity' series), primarily for potential new entrants to the industry. These could be further developed, particularly through a series of supporting case studies.
- 4.51 Training needs identified through the consultations include:
 - ?? Marketing
 - ?? ITC
 - ?? Basic business planning skills
 - ?? Tourism specific skills (e.g. working in a market-led sector, customers care etc.)

Support Organisations

- 4.52 Farm tourism support organisations will include:
 - ?? National and regional tourist boards
 - ?? Agricultural organisations such as the NFU
 - ?? Business Link/enterprise agencies
 - ?? Local authorities
 - ?? Farm tourism groups such as Cartwheel and Farm Stay
 - ?? Local tourism networks
- 4.53 While farms may be well networked through organisations such as the NFU, there is less of a network of rural tourism business (although there are some examples to the contrary, such as the Dartmoor

Tourist Association). As well as benefits of exchanging information and best practice, organisations such as the NFU and Devon Farms are able to provide expertise with issues such as planning. The implication is that non-farm rural tourism businesses may need to be targeted to mitigate lack of networks, or that networks should be encouraged for rural tourism businesses (including pubs, shops and restaurants as well as accommodation and attractions).

- 4.54 Part of the role of the support organisations is to stimulate sector thinking, create partnerships, arrange support from third parties (e.g. access to structural funding) and contribute specialist profession input. There is also a role for support organisations to continue to push quality standards and illustrate the commercial case for individual businesses to adopt these principals.
- 4.55 Consultations indicate that more could be made of the support organisations for farm tourism existing in the region, such as Cartwheel and Farm Stay. Farm Stay provides a farm-based co-operative with national coverage, while Cartwheel provides specialist professional staff. Views include the further involvement of more farms within Farm Stay, thereby strengthening its position as well as benefiting the farms concerned. More use could then be made of Cartwheel, providing services under contract to Farm Stay, direct to farms and to other tourism development organisations. This sort of scenario will require close co-operation between Farm Stay and Cartwheel.

Support Systems

- 4.56 There is the view that the structural funds available in the west of the region have resulted in a distortion of the development of tourism. In rural tourism terms, Devon, Cornwall and Exmoor are viewed as more sophisticated and innovative, and have benefited from substantial progress compared to some of the other counties. While the distribution of structural funds is outside the scope of this study, there is a case for an active distribution of the lessons learnt in the assisted areas to those elsewhere in the region.
- 4.57 Rural Enterprise Schemes funds from DEFRA are now available across the South West (except in Cornwall) for product development and marketing, Consultations suggest that rural tourism businesses have not been particularly successful at accessing the funds because of lack of familiarity, although this is being addressed through roadshows. The funds are allocated using a system of panels and this seems to work well for individual projects. However some of the marketing or other co-operative projects may be too large for the funds available for allocation by any one panel, and there may also be problems with funding schemes extending over extended periods of time. There is a case for DEFRA reapportioning funding to create a separate access to RES funding for co-operative projects and multi-year projects.
- 4.58 The South West Market and Coastal Towns Initiative is a regeneration programme underpinned by community-based planning. While much of the initial work is funded through the South West of England Regional Development Agency, a system of brokering tables (cross-agency funding panels) will be used to assemble funding packages for the projects emerging from the process in each of the participating towns. Some of the projects emerging from this initiative are tourism related and although local

- authorities are typically involved in the process, there is a case for early involvement by bodies such as South West Tourism to advise on the strategic fit of the emerging projects and provide support.
- 4.59 Consultations indicate that support for tourism diversification may only be appropriate for some farms, and that financial systems to support the wider set of farms to maintain the rural landscape will be a better solution.
- 4.60 A benchmarking system is called for, to allow farm tourism businesses to assess their strengths and weaknesses, and act appropriately – possible with the assistance of the support organisations discussed above.
- 4.61 Other views point towards the plethora of organisations positioning themselves as assisting farm tourism businesses and include the requirement for a one stop shop structure for farm tourism.
- There is also a view that explicit consideration needs to be given to the balance of support to new farm tourism start-up compared to support for existing farm tourism businesses. To an extent this process has started, for example the Rural Tourism Improvement Fund administered by South West Tourism in Cornwall. Such consideration needs to cover the maximising of the economic and other objectives sought.

Transport

- 4.63 Transport is identified as an issue by consultees:
 - ?? There is a national issue relating to increased car use, particularly in rural areas. This needs to be addressed nationally.
 - ?? Congestion is incompatible with rural tourism. Countryside imagery is solidly related to tranquillity, space and peace and quiet. It is reported that parts of the region are already losing this attribute and this could be dissuading visitors.
- 4.64 The way forward on this issue is viewed as setting up initiative to tackle hot spots at a local level, with a view to addressing the worst problems and establishing the best practice to apply to wider areas.

Quality Standards

- 4.65 There is a consistent view that the standard of the accommodation on offer has been improving and that it will continue to improve. Visitor expectations are also continuing to rise, partly fuelled by their experiences out of the region and partly as a result of the rising standards in their own homes.
- 4.66 Successful businesses have continued to improve standards, it the wider sense. This will include the standard of the fabric of the building, the level of equipment and the style in which it is being offered.

- 4.67 Individuality is considered part of quality. Within the overall quality of the offer, factors which provide some kind of uniqueness or attractive quirk will be of interest to visitors, although these factors are not substitutes for other measures of quality.
- 4.68 The style in which businesses are run will have an impact on repeat business and recommendations. Obvious thoughtfulness such as a range of children's toys, books and videos in places setting out to serve the family market will enhance the holiday experience and provide future commercial rewards. Consultations reinforce the importance of repeat business and recommendations.

Conclusions

- 4.69 There is continued evidence of the move in visitor preference from serviced to self-catering and any proposals for new developments need to be considered in the light of this.
- 4.70 Within the self-catering market there are specific identified opportunities:
 - ?? Properties that can accommodate large groups. Demand for these is currently limited by lack of supply, and this has resulted in competition across the UK. Consideration needs to be given to ease of access to transport infrastructure. There are opportunities to attract new visitors to the region through the development of such facilities. Complexes of smaller units with a large communal area may substitute for one property.
 - ?? Complexes that provide year round facilities have clear demand. Such complexes will benefit from a clear idea of whether they are serving an adult or family market.
 - ?? Self-catering apartments offering some serviced element (e.g. restaurant) and other year-round facilities located in exceptional situations and presented in a contemporary style. Such properties command premium rates and there is high demand although it is likely that planning issues will restrict supply.
- 4.71 There is little obvious opportunity for major new farm attraction development. Instead the most likely scenario is for the continued development of existing attractions with year round facilities designed to appeal as much to the day visit market as staying visitors. It is more likely that additional facilities will take the attraction away from its original farm roots, although there remains a recognition of identifying and retaining the important core farm attraction elements.
- 4.72 There may also be minor new attraction opportunities such as farm gardens, or open days on purely working farms.
- 4.73 There are continued opportunities to build the economic benefits from rural tourism:
 - ?? Better take up of locally sourced provisions and materials.

- ?? More provisions of information to encourage better local circulation of visitors, encompassing retail and catering as well as attractions etc. Particular benefits are seen from event-led cross-sector promotions.
- ?? Extended use of referral networks amongst businesses.
- ?? The investment in year round facilities and events will change the seasonal pattern of visits, with attendant economic benefits.
- 4.74 There is a role for regional bodies to maintain a dialogue with planning authorities about the role and benefits of tourism in rural areas, as well as increasing the understanding of the planning system amongst rural tourism businesses.
- 4.75 Conservation issues are not a direct visitor priority. However there are clear links between this issue and the overall management of the rural landscape, which is viewed as one of the main drivers of visits to the region. There are issues that need to be resolved about funding farmers' stewardship of the rural landscape. There are also cost benefits to businesses from the adoption of conservation principals e.g. saving money through energy efficiency measures.
- 4.76 Sub-regional rural and farm brands need to be established in the context of branding work being undertaken outside this study. There is a clear view that the farm brand should be part of the countryside brand.
- 4.77 There is also a view that the umbrella marketing and business support organisations should work more closely together.
- 4.78 Rural tourism businesses should continue to work with ITC for marketing themselves as well as ensuring that sufficient effort is put into customer focussed response to enquiries.
- 4.79 Training needs for farm and rural tourism businesses should be addressed through sector specific provision, ideally delivered through those identified as peers. Lessons learnt in those locations benefiting from structural funds should be actively disseminated elsewhere in the region.
- 4.80 There is a role for tourism development organisations (particularly South West Tourism) in other regeneration initiatives such as the Market and Coastal Towns Initiative.

5 PRODUCT MARKET FIT

Introduction

- 5.1 This section of the report brings together the relevant elements from the supply and the demand components of the overall research study. Further details of the demand work are found earlier in this document while the full supply study is published separately.
- The aim of this section is to identify where the supply of farm and rural based tourism meets current and likely demand, and where there is the potential to address any gaps.
- 5.3 The supply review section of the overall research project was directed to look at a specific set of issues relating to tourism provision on farms only. The extent of the product-market fit exercise is therefore bound by coverage of the supply exercise and there may be issues relating to other sections of rural tourism that are therefore outside the scope of this exercise. The farm tourism supply review covered:
 - ?? The extent of farm involvement in the various forms of farm accommodation
 - ?? The characteristics of the farms and farmers involved in farm accommodation ventures
 - ?? The extent of farm involvement in various forms of non-accommodation farm tourism.
 - ?? The characteristics of the farms and farmers involved in non-accommodation farm tourism
- A brief summary of the supply review is provided below. Full details of the Farm Tourism Supply review can be found in the separate document produced by Acumenia for South West Tourism.

Farm Tourism Supply

Farm Accommodation

- 5.5 The supply review indicated that 16% of farms in the South West are involved in any form of farm accommodation, with the highest proportion involved being in Cornwall and Devon (c.20% of farms).
- Of those who are involved in providing accommodation, the greatest involvement is in providing self-catering holiday homes (43%) followed by Bed and Breakfast (29%), touring caravans ((20%), static caravans (6%) and hostel/barn accommodation (2%).
- 5.7 Farms with accommodation in Devon and Cornwall are more likely to be supplying self-catering, while across the rest of the region a higher proportion of farms are supplying serviced accommodation.
- Indications of performance were mixed although it is apparent that while serviced accommodation is not full even at peak times, unlike self-catering.

- 5.9 The review also asked about previous involvement in providing farm accommodation. While 3% of farms had previously provided self-catering and had now stopped, over twice as many (7%) had previously provided Bed and Breakfast but had now stopped. For those that were not providing accommodation, there is a higher degree of interest in providing self-catering than Bed and Breakfast.
- 5.10 59% of those providing accommodation considered that it was important to the overall farm business. Most felt that the importance was increasing.
- 5.11 A very high proportion of farmers (85%) had set up their farm accommodation enterprises without a business plan.
- The farmers who owned their land (as opposed to tenant or managers), had larger farms and more than one farm holding were more likely to be involved in farm accommodation than other farmers. The farmers most likely to be involved are those who come from farming families but have moved around. The oldest and youngest farmers were the ones least likely to be involved or interested.
- 5.13 Grants and subsidies, along with advice of outside organisations, seem to have little impact in encouraging farmers to consider providing tourist accommodation. For those who are involved, market intelligence is the assistance most desired.

Other Farm Tourism Ventures

- 5.14 Across the region, 11% of farms are involved in other farm tourism ventures, with a generally more even distribution across the counties than the involvement in accommodation.
- 5.15 Of those who are making some provision, the greatest involvement is with fishing/shooting (29%), pony treks/riding (21%) and local produce/cafes etc. (21%). Farms in Cornwall, Devon and Somerset were the most likely to be involved in the provision of food, while those in Gloucestershire, Wiltshire and Dorset were more likely to be providing fishing/shooting or pony treks/riding. Overall however, provision of farm tourism ventures in Devon is more balanced than in the other counties.
- 5.16 Providing pony treks/riding is the activity most likely to have been introduced in the last two years, although across the board, almost half of all the non-accommodation farm tourism businesses have been going for over 10 years.
- 5.17 70% viewed their non-accommodation tourism venture as important to the overall farm business, with food-related ventures most likely to be viewed as essential. Over half indicated that the importance had increased over the last two years.
- 5.18 Similar to those who were providing accommodation, the farmers who owned their land (as opposed to tenant or managers) and had larger farms were more likely to be involved in farm accommodation than other farmers.
- 5.19 Unlike those providing accommodation, farmers involved in non-accommodation enterprises were more likely to be 50-64, less likely to be born into a local farming family and more likely to have had some agricultural training.

5.20 Grants and subsidies, along with advice of outside organisations, seem to have little impact in encouraging farmers to consider providing non-accommodation tourism venture. For those who are involved, market intelligence is the assistance most desired.

Analysis

Accommodation Type

- 5.21 Evidence earlier in the report points strongly towards a shift from serviced to self-catering accommodation. This is reflected in the relatively small percentage of farms that used to provide self-catering but have stopped (3%) compared to the larger percentage that used to provide Bed and Breakfast but have now stopped (7%). However, this has to be considered in the light of the greater investment (and therefore commitment) required to set up new self-catering development compared to serviced accommodation within the farmhouse.
- 5.22 Viewing the current provision of the different types of accommodation and the level of interest in developing new accommodation, it would appear that the new entrants to the Bed and Breakfast market are broadly balancing those who are leaving this part of the industry, while the higher interest in self-catering should be in line with expected patterns of demand.
- 5.23 It would appear that while some farms are involved in camping and caravanning, issues relating to seasonality and overall size of demand do not point towards any substantial demand for new provision.

Sub-regional Accommodation Issues

- 5.24 While the distribution of the provision of farm accommodation across the region is at least in part related to the pattern of demand, the consultations detailed earlier in the report pointed to the distortion resulting from the large scale structural assistance programmes in the west of the region.
- 5.25 The overall lower involvement in providing accommodation outside Devon and Cornwall would indicate that there is room to involve more farms in the east of the region. While the lower level of visits in the east of the region may point to less demand, lack of suitable supply will also constrain numbers of visitors.
- 5.26 That there is a lower proportion of farms involved in self-catering in Somerset and in counties to the east particularly suggests that some of the evolving patterns in terms of self-catering development are not being seen in these counties. In particular, some of the specific types of self-catering such as those accommodating large groups, or those providing year-round facilities may provide development opportunities where the other necessary elements are in place.
- 5.27 The concentration of interest in Bed and Breakfast provision in Cornwall, Devon and Dorset is not necessarily warranted by the evidence relating either to the changing market demand for different types of accommodation or the level of performance of self-catering businesses. While it is acknowledged that there may be specific local factors which increase demand (such as the reported increase in

demand for accommodation around the Eden Project in Cornwall), without the clear proof of demand for extra bedspaces further development of Bed and Breakfast accommodation can only be questionable.

Non-accommodation Businesses

5.28 In the same way that most of the farm accommodation businesses are in Devon and Cornwall, so are the other farm tourism businesses. Given the identified day visit potential for ventures such as farm shops etc., there may be further opportunities in the east of the region, particularly relating to the distribution of the major population centres.

Economic Issues and Benefits

- 5.29 High importance is attached to the provision of tourism facilities to the overall success of the farm business, and many expect the importance to continue to grow. Within those providing accommodation, self-catering and Bed and Breakfast are the most important and for the others, food-related ventures are the most important. The lack of take up by farms in the east of the region indicates that a potential source of support for agriculture is not being utilised.
- 5.30 That a high proportion of farmers elected to start their projects with no business plan confirms the view of consultees about the lack of research farmers undertake when considering new projects. There is a clear issue about the need for realistic assessments about demand, the costs of developing facilities and the routes to accessing markets by farmers. This will be of particular importance for developing projects in the east of the region in order to ascertain that current lack of provision is due to market distortion rather than simple lack of demand.
- 5.31 That larger farms are more likely to be involved in tourism than smaller ones maybe a reflection of their ability to raise funds for new projects. The lack of involvement of tenants may also be for the same reason, possible compounded by a lack of long term commitment. Indeed, lack of funds, along with a lack of knowledge and the negative impact of regulations are the sort of factors most cited is discouraging development of farm tourism enterprises and also the factors cited by other business start-ups (*New Business Formation in the South West, 2002 Atlantic Consultants*). Farmers identify the provision of market intelligence as one of the ways in which they wish to be assisted by outside organisations.
- 5.32 This suggests a strong role for support organisations in the provision of information, and an imperative to use it to produce a business plan. As well as guiding the farm tourism business, such work may also be of use in sourcing finance both from commercial lenders and from other funders (where opportunities exist). Access to information about compliance with regulations might serve to reduce barriers, and work such as that done by Devon Farms regarding planning is an example of how this might go forward.
- 5.33 Farmers who have received agricultural training are more likely to diversify into non-accommodation tourism ventures compared to those without such training, who are more likely to start accommodation ventures. In the same way, those who have moved around are more likely to start some form of tourism business. There is obviously some sort of interaction between exposure to ideas and the likelihood of starting a sort (or any) tourism business. The interaction is not entirely straightforward except to

indicate that exposure to new ideas either informally or informally increases entrepreneurialism amongst farmers. On this basis the existing networks used by farmers, particularly the NFU, have a role for further information provision and discussion of new ideas for farmers, with input from agencies such as South West Tourism, Cartwheel and Farm Stay.

- 5.34 The ability of outside organisations to influence farmers is limited, although there is a desire from farmers for information from outside agencies. Even the provision of grants or subsidy seems to have little impact. Altering the behaviour of farmers may therefore be difficult and it is suggested that once courses of action are agreed, it will take the efforts of as many organisations as possible to have an impact on behaviour. The discussion about the better take up of training from those judged as peers suggests that farm-based organisations may have an important role.
- 5.35 Discussion above about the impact of size and tenure of farms on the likelihood of involvement in tourism suggests that these factors are having a distorting influence on resources that might otherwise have good potential (location, buildings, space) for generating revenue streams for the farmers concerned. However the makings of successful businesses are based on a number of factors, including a strong financial base, good planning and the desire and ability of the individuals concerned to make a good job of it.

Conclusions

- 5.36 The supply analysis covered farms to the exclusion of other forms of rural tourism. The demand analysis notes that farm based accommodation forms a significant part of accommodation sought by rural tourism visitors, although there will be a section of the market who will specifically not want to use farms and another section who have no preference for farm or non-farm rural accommodation. Farm attraction development has tended to move away from the original farm offering.
- 5.37 There is a relative lack of farm involvement in the east parts of the South West and a lack of self-catering provision in the farms that are providing accommodation. This indicates an opportunity for further self-catering development in the east of the region. This should pick up on the types of self-catering development identified earlier in the report (complexes with year-round facilities, ability to accommodate large groups, semi-serviced apartments in outstanding locations) and consider factors such as ease of access to transport infrastructure and flexible booking periods (particularly regarding short breaks).
- 5.38 There is also a consistent view of strong demand in coastal areas.
- 5.39 Lower occupancy rates and indications of the type of accommodation most in demand suggest that further Bed and Breakfast development is questionable unless there are specific local circumstances or other proof of demand.
- 5.40 There are opportunities for more non-accommodation based ventures, particularly in the east of the region in order to pick up day visit potential. Once again, access to transport infrastructure will be important.

- 5.41 The supply analysis indicated a lack of business planning for farm tourism projects, and this is confirmed by some of the consultations, which further suggested that developments without adequate planning were likely to fail. Given the apparent lack of opportunity to influence farmers, addressing this issue this could be difficult, although some of the suggestions relating to business advice delivered on a one-to-one basis through peers may be a suitable option. A regime of good planning by farmers will be beneficial whatever activities they are considering.
- There may be links between the lack of planning and the reported lack of finance, with the likelihood of commercial or public funds reduced when there is no evidence of a researched and planned proposal. It is considered that business planning will make some progress towards addressing the reported difficulties in generating funds.
- 5.43 Consideration needs to be given to the messages to farmers about involvement in tourism. Not all farms or farmers are in a suitable position and part of the role of the bodies taking on the mantle of development of this sector will be to dissuade those who are not suitable.
- 5.44 For the bodies who wish to be involved in the development of farm tourism, there is a serious resource issue to be addressed. Earlier discussion has identified the role of one to one advice through specialist advisors as well as working through peer groups. All these issues will result in the requirement to allocate realistic staff and financial resources.
- 5.45 Earlier sections of this document discuss the need to disseminate lessons learnt and best practice gained through funding programmes throughout the rest of the region, as well as issues relating to sub-regional brands and other marketing and business support issues. This is of particular relevance to the recommended development of accommodation in the east of the region emerging from this product market fit exercise.

6 IDENTIFYING THE SIX-YEAR PLAN

Introduction

- This section of the report considers the supply, demand and product-market fit elements of the report and uses them to identify the key issues which could then form part of a future plan. It is anticipated that this section can form the basis of a consultation document to test the issues amongst stakeholders. The rest of the study can form the supporting evidence.
- While the issues below are drawn from the weight of research in the rest of the study, these form the views of the consultants and do not necessarily represent the views or priorities of South West Tourism.

Markets

- 6.3 Within the overall market for rural tourism there is a sub-market for farm-based tourism. Estimates put the active farm tourism market at about a third of the overall rural tourism market although another third will passively use farm tourism in order to gain the desired rural tourism experience.
- The countryside is increasingly a destination for additional holidays and short breaks, with the main markets identified as short break takers without children, extended break/additional holidays by families in peak season and, on a smaller scale, business visitors. Within the leisure markets, there is demand by groups of people, either family(s) or friends, who wish to take a break or short holiday together.
- 6.5 Late booking is a factor for the rural tourism industry, just as it is for the industry in other destination types. There is a continued need to improve access to information to customers and to build bookability.
- 6.6 While it is more likely that families will use self-catering rather than serviced accommodation, this is by no means an absolute.
- 6.7 There are identifiable markets for farm tourism within rural tourism. There is also a need for places to establish whether they are setting out to serve a family or an adult market. The consensus is that businesses ideally need to identify their niche and then set out to serve that niche. Those who for whatever reason do not wish to commit themselves fully (perhaps because different markets are served at different times of the year) will need to establish some form of system of identifying what individual visitors want and then seeking to deliver accordingly. The main difficulty with adopting this middle way will be in presenting the facility in such a way that attracts one market without discouraging others.
- There has also been growth in the use of the countryside by day visitors from home, and the main impact will be seen in areas adjacent to centres of population and along good transport communication routes.
- 6.9 There is particular demand for rural destinations near the coast.

Issues - Markets

- The main issues to be addressed relate to capitalising on the growing markets for short breaks which are likely to be of particular importance to the more accessible parts of the region while preserving the longer trips in other parts of the region (where tourism may be one of the main economic activities). The balance of support for what could be seen as two different markets is potentially an issue, although as the basic core attributes for both (relaxation, tranquillity, farm warmth of welcome and food) are the same, the gap may slight enough to encompass the spectrum of visits within the same marketing model.
- 6.11 There is likely to be demand for more facilities for day visitors from home, and the increased use of honeypot destinations. Visitor management programmes will reed to be set up to avoid levels of congestion removing the tranquillity attributes sought by visitors. Incentives as well as restrictions will be needed to alleviate problems and disperse visits.

Recommendations - Markets

- 6.12 That rural short breaks and additional holidays are marketed around the central themes of relaxation and tranquillity, plus farm warmth of welcome and food. Rural locations in proximity to the coast will have an advantage over those further inland although there is a market for both.
- 6.13 It is recommended that continual improvements are made in the provision of information and ease of booking by both tourism marketing organisations and individual businesses.
- 6.14 It is recommended that there is active encouragement and management of the day visitor market for rural and farm visits. While organisations such as South West Tourism already use local press and other mediums to market attractions to local markets, there is also a role for local consortia to put together appropriate initiatives. Local consortia should be cross sector (including pubs and shops) and include information on countryside public product as well as formal attractions.
- 6.15 It is recommended that continued efforts are made to break into the business tourism market by those businesses in a position to cater for it.

Products

6.16 A clear picture emerges from the evidence available of a relatively limited demand for substantial extra farm or rural Bed and Breakfast accommodation except where there is proven need – either because of some unique feature of the offer or because of local factors (e.g. proximity to major new tourist developments such as the Eden project, or particular suitability for accessing business tourism markets). However there is a dynamism in the supply of facilities which will require some new supply to replace the accommodation leaving the market and there will also be the requirement for the continued improvement of Bed and Breakfast accommodation (all ensuite, TV's, etc.).

- 6.17 There is also a clear picture of a requirement for more self-catering accommodation although with a number of specific foci:
 - ?? Strong demand for properties that can accommodate large groups
 - ?? Strong demand for complexes that provide year round facilities
 - ?? Demand for very high quality self-catering apartments with facilities and some serviced elements in exceptional locations
- 6.18 There is no clear picture of need for new camping or caravan facilities, although there may be opportunities at a local level. Locations near the coast are likely to receive most demand although it is likely that many of the obvious sites have now been utilised.
- 6.19 There are relatively few farms offering farm tourism services in the east of the region. While this will be due in part to weaker demand in the east, there are opportunities for further careful development.
- 6.20 There is little obvious opportunity for new major farm attraction development, although existing farm attractions will continue to develop their offer to visitors, particularly day visitors. While it is likely that the attraction development will take the attraction away from its farm roots it seems clear that the original core farm elements remain important to visitors. There are opportunities for temporary use of farms for events and exhibitions.

Issues - Products

- 6.21 While there are some clear opportunities for development of self-catering, these need to be managed so as not to saturate market demand, and so that projects are developed and operated in a way suitable for market expectations.
- 6.22 There is some argument about specific support for flagship projects to build profile and year round trips, and this warrants further consideration.

Recommendations - Products

- 6.23 It is recommended that potential new rural accommodation projects are advised about what the identified opportunities are, and what the potential pitfalls are. There is a role for South West Tourism and other tourism development organisations to provide guidance about product development both directly and through other organisations such as Business Links, Enterprise Agencies and banks.
- 6.24 It is recommended that farm-based attractions be assisted in their continued development and their exploitation of different sectors of the market (e.g. day visitors from home). It is considered that in the main, development of facilities for different sectors of the market will improve the overall offer to potential new and repeat visitors, and so ensure business viability.
- 6.25 It is also recommended that further investigation of the way the farms can be used as temporary attraction/event venues be investigated, in particular the way in which networks of those with potential

exhibitions and events can be put in touch with those farmers with the opportunity, skills and inclination to host them.

Enhancing the Holiday Experience

- 6.26 Quality standards have risen in farm and rural tourism just as they have in other destination types and it is apparent that quality will have to continue to rise in the future. As well as the range of facilities, visitors will view individuality and proprietor thoughtfulness as integral to quality. As well as the existing quality assurance schemes, many farm and rural tourism businesses are well placed to fit in the forthcoming English Tourism Council and Countryside Agency sustainability accreditation scheme.
- 6.27 Walking remains the most popular countryside activity, with other outdoor activities relatively minor in comparison. People particularly interested in staying on a farm and families are more likely to be interested in other outdoor activities.
- Access to local facilities such as shops, restaurants and pubs is important to visitors to the countryside, as well as interesting villages and market towns to look around. While secluded accommodation is desirable, isolation is not wanted. There is also strong visitor interest in local produce.
- 6.29 There is a minority visitor interest in directly applying conservation criteria to accommodation choice. However there is a link between conservation and the overall attractiveness of the region, although at an individual business level the most powerful messages will relate to the visitor benefits from staying in a well-managed landscape, reflecting the underlying tradition of good husbandry.
- 6.30 Congestion is incompatible with rural tourism, yet increasing car use by residents and visitors is leading to congestion, particularly in honeypot areas.

Issues - Enhancing the Holiday Experience

- 6.31 Although the market for activities on holiday and specific activity holidays may be small compared to the overall rural tourism market it forms a significant niche for those businesses servicing this market. It also provides a disproportionate importance in marketing and PR terms, with outdoor activities reinforcing positive rural attributes and providing newsworthy opportunities.
- 6.32 The visitor interest in access to village shops, pubs etc. demonstrates the clear tourism links outside the core tourism business sector. In some rural areas it will be the combination of visitor and resident expenditure that maintains the economic fabric of an area. Although research demonstrates that there is strong interest in local foods, some businesses seeking to capitalise on this opportunity have encountered difficulties.
- 6.33 Although the evidence collected by the study shows that visitors have not been applying conservation yardsticks to accommodation choices, the continued general interest in conservation as part of mainstream thinking indicates that in time more decisions will be swayed by environmental issues. The absence of any 'green grading' system may also have held back the latent interest in these issues and

- the forthcoming English Tourism Council and Countryside Agency sustainability accreditation scheme could provide the solution. To be effective the scheme will have to be well resourced and marketed.
- 6.34 The issues relating to increased car use can be addressed at a regional and sub-regional level, but these will only represent treating a symptom of what is a much larger national issue.

Recommendations - Enhancing the Holiday Experience

- 6.35 It is recommended that continued attention is given to increasing the penetration of the national quality assurance schemes, and that these efforts are backed up by increased marketing of the scheme to potential visitors nationally, and work to demonstrate to businesses that participation represents value for money. Funding scheme administrators should continue the practice of linking assistance with the condition of participation in the schemes. It is also recommended that the same principles apply to the sustainable accreditation scheme.
- 6.36 It is recommended that activities on holiday and activity holidays continue to be high on the agenda in order to exploit their ability to
 - ?? Raise the profile of the rural areas that accommodate them,
 - ?? Generate interest in new visitor segments
 - ?? Provide support to those businesses that are capitalising on the value added opportunities.
- 6.37 It is recommended that the attractiveness of village shops and pubs is highlighted in countryside holiday motivational material, along with references to local produce and recipes. Tourist Information Centres, accommodation providers and attractions all have a role to play in providing visitors in the locality with information on opportunities to visit local shops and pubs, farmers markets etc. It is suggested that local tourism associations are best placed to assemble this information.
- 6.38 It is recommended that rural congestion locations are identified and that locally based schemes are devised and implemented. This is likely to primarily be a role for local authorities, or national park authorities if appropriate. Regionally it is recommended that visitors are provided with information on attractive non-car means of transport.

Economic Benefits

6.39 Different elements of the rural economy are linked, with future prosperity for farms based on the vitality of the rest of the rural economy and vice versa. Tourism is one tool to generate vitality and prosperity, but without the success of other elements many of the potential benefits will be lost. Village pubs and shops often need the patronage of both locals and visitors and removal of one element can jeopardise the overall viability. The prosperity of farms in particular is directly linked to the stewardship of the countryside, and the quality of the managed landscape is the driver for much of the region's tourism.

- 6.40 The opportunities to build economic benefits from tourism are:
 - ?? Better take-up of locally sourced provisions and materials
 - ?? Improved information for visitors to circulate locally, highlighting retail and catering opportunities as well as attractions and informal recreation
 - ?? Extended use of referral networks amongst businesses
 - ?? Investment in year-round facilities and events to flatten the seasonal pattern of visits

Issues - Economic Benefits

- 6.41 Tourism is not the only diversification opportunity for farms and there needs to be explicit consideration of what the best solution is for individual cases. There needs to be maintenance of the countryside at the core of any consideration of support for farms, with the issue of whether the farm provides the tourism facility or some one else does as a secondary issue.
- 6.42 The clear linkages within rural economies strongly suggest that support for tourism needs to be considered as part of the wider support for rural areas.

Recommendations - Economic Benefits

- 6.43 It is recommended that there needs to be extended dialogue between the agencies responsible for developing the rural economy, to include the Countryside Agency, the Regional Development Agency, Local Authorities and South West Tourism. The Way Forward Group chaired by South West Tourism could be the basis for the participation in this dialogue. For such a dialogue to produce tangible results there will need to be some commitment to bring funding and time resources to the table.
- 6.44 It is also recommended that the organisations marketing farm and rural tourism build the number of businesses participating and use these extended bases to increase referrals. At a local level, individual businesses should be encouraged to work with ather than in competition with other businesses, and that this needs to recognise that the tourism experience is cross sector rather than simply accommodation or attractions. Similarly, retail and catering businesses will need to be active members of referral networks. It is suggested that South West Tourism is best placed to work amongst the umbrella marketing and development organisations, while establishing local referral networks will need to be a long term task for a much broader constituency.

Marketing Support

There is a need for branding for rural and farm tourism in the South West, and this needs to sit comfortably around the regional and sub-regional branding work currently being undertaken. In branding terms, farm tourism is a sub-section of the rural tourism brand. The national rural tourism branding work will also need to be considered.

- Marketing support for rural and farm tourism businesses is needed to ensure the viability of capital projects supported by the various funding programmes. There is some evidence that the use of panels for funding schemes such as RES may be good for individual projects but less suitable for larger cooperative marketing schemes.
- 6.47 Umbrella organisations such as Tourist Boards, Farm Stay, Cartwheel etc. provide marketing support services for individual businesses. There is a requirement that umbrella organisations work closely together for the benefit of the businesses they seek to serve.

Issues - Marketing Support

- 6.48 While there are obvious benefits from making use of the national rural tourism branding and the overall regional tourism branding (and the resources supporting brands), these need to be balanced with the distinctive regional rural brand elements, and for some markets, the strong positive regional farm tourism brand elements.
- 6.49 Within the region there is the issue of the different rural images for different areas, and the choice between making the most of the areas which have the strongest association with rural tourism at the expense of the other areas, or using the linking the weaker areas with the stronger ones in order to spread the benefits.
- 6.50 While individual rural and farm tourism businesses may benefit from co-operation between the umbrella marketing organisations, the funding and provision of commercial services issues faced by these organisations all provide pressures for them to compete.

Recommendations - Marketing Support

- It is recommended that the choice of rural tourism branding is considered in the context of the chosen target visitors, with the factors such as familiarity with the region/product and lifestage the core factors.
- In the context of the South West Tourism's broad development remit it is recommended that the locations with strong positive rural brand imagery are used to support weaker areas.
- 6.53 It is also recommended that active dialogue continues between the umbrella organisations, and that the private and public funders of these organisations continue to apply pressure for co-operation.

Reaching the Customer

- 6.54 Farm tourism businesses need to decide whether they are providing a farm or rural experience, and whether they are looking to serve a family or adult market. While many businesses are doing this, it is apparent that some are not.
- 6.55 The use of the Internet as a marketing tool continues to rise and all tourism businesses should have a professional presence and links to relevant portal sites. Many tourism business sites do not make enough use of the medium to provide enough motivational material, including a wide selection of

- pictures. The majority of the customer market will be looking at the quality and professionalism of the printed and electronic marketing material as reassurance about the way the rest of the business is run.
- 6.56 It is clear that the quality of the operator's response to enquiries is key in converting enquiries to sales, and imaginative contact with previous customers will have an impact on levels of repeat business.
- 6.57 Booking services and agencies have a role in putting businesses in touch with customers.

Issues - Reaching the Customer

- 6.58 While there is broad guidance to individual businesses about the ways that they should market themselves, different businesses will have different levels of success with the various ways of contacting potential customers. Although this can be viewed as a natural part of the process of finding the best way, for those businesses going through the process it can be expensive and frustrating, and at worst, some businesses will cease trading before a suitable vehicle is found. The problem is compounded by the interaction between the words and images used by businesses with the medium used.
- 6.59 There is a lack of reliable information for businesses on the performance of different ways of reaching customers, and this is compounded by the need to sell marketing services on a commercial basis by the organisations which might otherwise be able to take an objective view.

Recommendations – Reaching the Customer

- 6.60 It is recommended that further research is undertaken on the best ways for farm and rural tourism businesses to reach their customers. This could take the form of case studies.
- 6.61 It is recommended that there is continued emphasis on the provision of market intelligence for rural tourism businesses on different customer market segments and the experiences sought. Although this and other studies provide this sort of information, there is a case for further work, particularly linked to geo-demographic based tools. While there is a regional role here, it is also likely that some of the work may be carried out nationally.

Training and Business Support

- The structure of the business support for rural tourism is identified as a key issue, both in terms of the juxtaposition of the organisations providing the support and the way that the support is delivered.
- The study indicates that fragmentation and duplication of business support services waste resources and are counter productive. The Farm Business Advice Service (delivered through Business Link) is available to provide support, although this is not available for the rest of the rural businesses who may be considering tourism issues. NFU will also provide support, as will tourism development organisations and local authorities, and a host of private sector organisations, particularly banks.

- At a delivery level the recommended model is that sector specific training delivered by peers is most likely to be taken up and viewed as beneficial. Business advice delivered on a one-to-one basis is seen as the most use to businesses, both for building success for the venture as well as ensuring that those whose circumstances do not lend themselves to tourism are dissuaded from entering the industry.
- There is a case for the better dissemination of lessons learnt in the areas benefiting from structural funds, both within the areas themselves and also across the rest of the South West. This would include an understanding of the way that funds can be best used as well as best practise projects, tailored towards funding programmes deemed relevant, particularly RES.
- 6.66 The lack of business planning by farm-based tourism enterprises needs to be addressed.
- 6.67 There are a number of issues relating to planning. Nationally, tourism projects are less likely to get planning permission than other projects and locally there is a picture of an inconsistent approach within and by different planning authorities. Tourism businesses with a good understanding of the planning system are more likely to have projects approved.
- There is a role for the involvement of South West Tourism and other tourism development organisations in rural regeneration initiatives such as the Market and Coastal Towns Initiative.

Issues - Training and Business Support

- 6.69 The potential for duplicating support services will arise because of the cross sector nature of farm tourism and the role to be played by tourism organisations and agricultural organisations. Some of the support is organised at a national level and some at a regional or sub-regional level. This will require constant attention to the respective roles of these industry bodies at a national and local level.
- 6.70 Delivery of business advice on a one-to-one basis is an expensive exercise. Within the scenario of limited resources the best way forward may be to deliver these services in the areas of greatest economic need, particularly as these areas are also most likely to attract the funds necessary to deliver such services. A model may be to extend the Farm Business Advice Service to other rural businesses.
- 6.71 Overall the planning system has been at least partly responsible for the maintenance of the high quality managed environment that drives much of the region's tourism and on this basis any changes required are incremental rather than radical.
- 6.72 The involvement of South West Tourism in wider regeneration initiatives is hampered by the lack of development funding available.

Recommendations – Training and Business Support

- 6.73 It is recommended that there should be continuing dialogue between organisations to ensure that business support for rural and farm tourism is delivered in a structured way and resource-efficient way.
- 6.74 Targeted business support services should be broadened to include all rural businesses.

- 6.75 It is recommended that a set of guidance and best practice case studies should be generated and distributed. The findings from any such exercise should be considered by those administering funding programmes. It is suggested that South West Tourism play a central role in this process.
- 6.76 It is recommended that South West Tourism provides further guidance for planning authorities on tourism overall and specific tourism products to supplement PPG21/future planning guidance systems.
- 6.77 It is recommended that South West Tourism further develops a constructive role in other rural regeneration initiatives.

Next Steps

- 6.78 Following the review of the evidence collected, the study has identified a number of specific recommendations. The next steps will be for South West Tourism to consider these recommendations and assign priorities to the ones it wishes to pursue.
- 6.79 It is suggested that to take forward the issues identified in the report a group of stakeholders is assembled both to provide views and, eventually, to assemble funds. This group should take responsibility for generating an acceptable action plan and pursuing the time and funding resources needed to carry it out.
- 6.80 It is suggested that group members could include:
 - ?? South West Tourism
 - ?? Government Office for the South West (DEFRA)
 - ?? South West of England Regional Development Agency
 - ?? Countryside Agency
 - ?? English Tourism Council
 - ?? NFU
 - ?? Farm Stay
 - ?? Cartwheel
 - ?? Local Authority representatives
 - ?? Farm and Rural Attraction representatives
 - ?? Farm and Rural Accommodation representatives
- 6.81 The Way Forward Group could form the basis for the future Rural Tourism Action Group.

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- 6.82 The study has also identified some areas for potential future work. Of these the most significant is the effect of the wider ongoing work on brands and how these will work for rural and farm based businesses at a national, regional and local level. Other work includes:
 - ?? The potential for locally-based work to determine needs for new accommodation or attractions
 - ?? Case studies to build best practice support for the South West Tourism *Weighing up the Opportunity* series of guides
 - ?? Marketing support research addressing the different success rates of different marketing mediums, to include the effect of the product offered and the text and visual style in which the offer is presented
 - ?? Further investigation into the business tourism opportunities and how to access this market
- The grant schemes administered by South West Tourism and other organisations such as DEFRA offer the opportunity to collect information from projects and identify potential case studies.

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APPENDIX ONE CONSULTEES

Consultees

Name	Organisation
Mary Pengelly	Farm Stay UK
Liz Smith	Farm Stay UK
Jean Barnes	Farm Stay UK
Gina Woodcraft	Cartwheel
Allan Williams	Exeter University
Paul Jefferies	English Tourism Council
Mark Leach	British Tourist Authority
Mike Ellingham	National Farmers Union
Rachel Clayton	Gloucestershire County Council
Janet Reynolds	Devon County Council
Moray Bowater	Helpful Holidays
Rick Turner	Big Sheep
Robin Head	Devon Farms

APPENDIX 2 TELEPHONE RESEARCH

Telephone Research Introduction

- 1. The sample used for the telephone research was drawn from the South West Tourism 2002 Town and Country Lead Generation Campaign. This campaign is undertaken annually with partners and seeks to generate new potential visitors for the South West. As well as editorial, the campaign allows potential visitors to respond to specific partners. Note that this campaign is complemented by a separate campaign soliciting response for coastal holidays in the South West.
- 2. A random sample was selected from the different elements of the campaign and telephone calls were made by South West Tourism/Carrier Direct interviewers during early weekday evenings during April 2002. Contacts were tried three times on separate days before being deemed uncontactable. Interviewers used computer assisted telephone interviewing, ensuring the correct routing through the questionnaire.
- 3. The study team gratefully acknowledges the assistance of Cartwheel and Farm Stay for their assistance in building the sample for this part of the study.
- 4. Note that percentages are rounded to the nearest whole number and that as a result may not total to 100%.

Analysis by Enquirer Type

5. The sample used for the telephone research was partly drawn from the general enquirers, and partly from those indicating an interest in farm accommodation. 250 interviews were undertaken amongst general enquirers and 150 amongst those interested in farm accommodation. This analysis splits the information gained from the survey into general holidays and farm holidays.

Table 1.1: Holiday planning at time of seeing Lead Generation Campaign

Situation	General Holiday %	Farm Holiday %	All %
Already decided to holiday in the	26	29	27
West Country			
Seriously considering holidays in	41	39	40
the West Country			
Had not seriously considered	7	3	5
taking a holiday in the West			
Country until saw campaign			
West Country one of the holiday	22	23	22
destinations considered			
No real intention of holidaying in	4	5	5
the West Country			
Don't know/can't remember	1	1	1

Table 1.2: Holiday planning at time of interview

Situation	General Holiday %	Farm Holiday %	All %
Already taken a holiday in the	14	12	14
West Country in 2002			
Booked a holiday in the West	17	17	17
Country			
Will definitely take a holiday in	13	12	12
the West Country			
Yet to decide whether to take a	47	46	47
holiday in the West Country			
Will not take a holiday in the	7	8	8
West Country			
Don't know/can't remember	2	5	3

Table 1.3: Holiday Group Type

Group Type	General Holiday %	Farm Holiday %	All %
Family with dependent children	9	7	8
Adults only	88	87	87
Either/both	3	6	4

Table 1.4: Age of Youngest Child (Family groups only)

Group Type	General Holiday %	Farm Holiday %	All %
0-5 years old	48	60	52
6-11 years old	35	30	33
12-15 years old	17	10	15

Table 1.5: Previous Visits to the West Country

Previous Visits	General Holiday %	Farm Holiday %	All %
Previous holiday in the West	93	93	93
Country			
No previous holiday in the West	7	7	7
Country			
Number of previous visits in the	last five years		
1-3	41	46	43
4-6	25	22	24
7-9	3	2	2
10+	8	8	8
None in the last five years	23	23	23
Can't remember	1	0	1

Table 1.6: Previous Staying Trips to the Countryside

Previous Visits in last 5 years	General Holiday %	Farm Holiday %	All %
Have taken holiday or short	61	60	61
break in the UK countryside			
No holiday or short break in the	40	40	40
UK countryside			
Countryside Staying trip in the	West Country (only th	ose who have taken U	K trip)
Have taken holiday or short	73	64	70
break in the West Country			
countryside			
No holiday or short break in the	27	36	31
West Country countryside			
Future Countryside Staying trip	in the West Country (only those who have i	not taken West
Country trip)			
Would consider holiday or short	80	88	83
break in the West Country			
countryside			
Would not consider holiday or	12	6	9
short break in the West Country			
countryside			
Don't know	8	7	7

Table 1.7: Preferred Countryside Accommodation Type (first choice)

Accommodation Type	General Holiday %	Farm Holiday %	All %
Farm bed & breakfast	17	36	24
Farm self-catering	12	15	13
Farm camping/caravanning	2	2	2
Hotel/guesthouse	37	30	34
Non-farm bed & breakfast	6	5	6
Non-farm self-catering	12	7	10
Non-farm camping/caravanning	9	3	7
With friends/relatives	1	1	1
Second home	2	0	1
Other	4	2	3

Table 1.8: Accommodation on a Farm Considered (second choice)

Accommodation	General Holiday %	Farm Holiday %	All %		
Would consider staying on a	46	72	53		
farm					
Would not consider staying on a	54	28	47		
farm					
Preferred farm accommodation	Preferred farm accommodation (only those who would accept farm accommodation as a				
second choice)					
Farm bed & breakfast	65	73	68		
Farm self-catering	24	26	25		
Farm camping/caravanning	6	0	4		
Other	4	2	3		

Table 1.9: Motivations for Visiting a Farm

Motivation	General Holiday %	Farm Holiday %	All %
Warmth of welcome	40	44	42
Animals	22	23	22
Quality of food	25	23	24
Being in the heart of the country	57	37	48
Relaxing	40	28	34
Involvement in farm activities	3	5	4
Good for children	12	6	10
Other	8	6	7

Table 1.10: Impact of environmentally sustainable practices on farms

Impact	General Holiday %	Farm Holiday %	All %
More likely to choose farms that	77	85	81
were making efforts to preserve			
the environment			
No more likely to choose farms	7	10	9
that were making efforts to			
preserve the environment			
Don't know	16	5	11

Table 1.11: Importance of Access to the Coast when Staying in the Countryside

Access to the coast is	General Holiday %	Farm Holiday %	All %
Very important	29	17	25
Quite important	22	23	22
Not important	50	59	53
Don't know	0	1	1

Table 1.12: Maximum Journey Time to the Coast when Staying in the Countryside (for those indicating that access is very or quite important)

Maximum Journey time	General Holiday %	Farm Holiday %	All %
Half an hour or less	71	64	67
Half to one hour	26	32	28
More than one hour	3	3	3
Average	36 minutes	44 minutes	39 minutes

Table 1.13: Importance of Access to Local Facilities such as Shops, Restaurants and Pubs when Staying in the Countryside

Access to Local Facilities is	General Holiday %	Farm Holiday %	All %
Very important	54	37	48
Quite important	30	33	31
Not important	16	29	21
Don't know	0	0	0

Table 1.14: Importance of Eating Locally Produced Food when Staying in the Countryside

Eating Local Food is	General Holiday %	Farm Holiday %	All %
Very important	49	61	54
Quite important	30	23	27
Not important	20	17	19
Don't know	0	0	0

Table 1.15: Interest in Buying Food from a Farm Shop

Interest	General Holiday %	Farm Holiday %	All %
Would be interested	82	84	83
Would not be interested	12	12	12
Don't know	6	5	6

Table 1.16: Interest in Out of Season West Country Countryside Holiday or Short Break

Interest	General Holiday %	Farm Holiday %	All %
Would be interested in an out of	47	57	51
season holiday			
Would be interested in an out of	84	87	85
season short break			
Don't know	4	4	4

Table 1.17: Activities considered for a West Country Countryside Holiday or Short Break

Interest	General Holiday %	Farm Holiday %	All %
Walking	74	71	73
Cycling	5	10	7
Fishing	2	5	3
Golf	4	3	4
Pony trekking	2	3	3
Learning a new skill e.g.	2	0	1
cooking, painting etc.			
Relaxing	41	41	41
Visiting heritage and country	45	47	46
homes			
Visiting gardens	44	39	43
Visiting other attractions	20	23	21
Visiting towns and villages	23	23	23
Visiting the coast	15	20	17
None of these	1	1	1
Other	8	2	6

Table 1.18: Impact of Easily Available Activities on Destination Choice

Interest	General Holiday %	Farm Holiday %	All %
More likely to visit	62	57	60
Not really important	34	40	36
Don't know	4	3	4

Table 1.19: Frequency of the Holiday Type in the Sample

Frequency	General Holiday %	Farm Holiday %
Group	63	37

Analysis by Holiday Group Type

6. Previous studies indicate the importance of dependent children in describing the market for farm and rural tourism products. This analysis splits the telephone research sample between those who normally holiday as a family with children under 16 years old, and those who do not. There is a third group who will typically do both.

Table 2.1: Holiday planning at time of seeing Lead Generation Campaign

Situation	Family with	Adults only	Either/both %	All %
	Children %	%		
Already decided to holiday in the	26	27	58	28
West Country				
Seriously considering holidays in	29	42	25	40
the West Country				
Had not seriously considered	13	5	0	5
taking a holiday in the West				
Country until saw campaign				
West Country one of the holiday	23	22	17	22
destinations considered				
No real intention of holidaying in	10	4	0	5
the West Country				
Don't know/can't remember	0	1	0	1

Table 2.2: Holiday planning at time of interview

Situation	Family with	Adults only	Either/both %	All %
	Children %	%		
Already taken a holiday in the	13	13	27	13
West Country in 2002				
Booked a holiday in the West	23	16	18	17
Country				
Will definitely take a holiday in	19	12	9	12
the West Country				
Yet to decide whether to take a	29	49	27	46
holiday in the West Country				
Will not take a holiday in the	7	7	18	8
West Country				
Don't know/can't remember	10	3	0	3

Table 2.5: Previous Visits to the West Country

Previous Visits	Family with	Adults only	Either/both %	All %
	Children %	%		
Previous holiday in the West	91	93	94	93
Country				
No previous holiday in the West	9	7	6	7
Country				
Number of previous visits in the	last five years			
1-3	57	41	44	43
4-6	17	25	19	24
7-9	0	3	6	3
10+	3	8	6	8
None in the last five years	23	22	25	23
Can't remember	0	1	0	1

Table 2.6: Previous Staying Trips to the Countryside

Previous Visits in last 5 years	Family with	Adults only	Either/both %	All %
	Children %	%		
Have taken holiday or short	61	61	59	61
break in the UK countryside				
No holiday or short break in the	39	39	41	40
UK countryside				
Countryside Staying trip in the	West Country (o	nly those who ha	ve taken UK trip)
Have taken holiday or short	45	72	60	70
break in the West Country				
countryside				
No holiday or short break in the	55	28	60	31
West Country countryside				
Future Countryside Staying trip	in the West Cou	intry (only those	who have not ta	ken West
Country trip)				
Would consider holiday or short	78	84	91	83
break in the West Country				
countryside				
Would not consider holiday or	9	9	9	9
short break in the West Country				
countryside				
Don't know	13	7	0	8

Table 2.7: Preferred Countryside Accommodation Type (first choice)

Accommodation Type	Family with	Adults only	Either/both %	All %
	Children %	%		
Farm bed & breakfast	9	25	29	24
Farm self-catering	27	11	29	13
Farm camping/caravanning	3	2	0	2
Hotel/guesthouse	18	37	12	24
Non-farm bed & breakfast	3	6	6	6
Non-farm self-catering	15	10	12	10
Non-farm camping/caravanning	18	6	6	7
With friends/relatives	0	1	0	1
Second home	0	1	6	1
Other	6	3	0	3

Table 2.8: Accommodation on a Farm Considered (second choice)

Accommodation	Family with	Adults only	Either/both %	All %
	Children %	%		
Would consider staying on a	80	51	29	53
farm				
Would not consider staying on a	20	49	71	47
farm				
Preferred farm accommodation	(only those who	would accept fa	rm accommodat	ion as a
second choice)				
Farm bed & breakfast	50	71	50	68
Farm self-catering	44	22	50	25
Farm camping/caravanning	6	4	0	4
Other	0	4	0	3

Table 2.9: Motivations for Visiting a Farm

Motivation	Family with	Adults only	Either/both %	All %
	Children %	%		
Warmth of welcome	6	23	28	22
Animals	16	11	16	12
Quality of food	4	14	8	13
Being in the heart of the country	16	27	16	25
Relaxing	10	19	8	18
Involvement in farm activities	8	1	12	2
Good for children	36	1	12	5
Other	4	4	0	4

Table 2.10: Impact of environmentally sustainable practices on farms

Impact	Family with	Adults only	Either/both %	All %
	Children %	%		
More likely to choose farms that	93	79	92	81
were making efforts to preserve				
the environment				
No more likely to choose farms	3	9	8	8
that were making efforts to				
preserve the environment				
Don't know	3	12	0	11

Table 2.11: Importance of Access to the Coast when Staying in the Countryside

Access to the coast is	Family with	Adults only	Either/both %	All %
	Children %	%		
Very important	49	22	29	25
Quite important	33	21	18	22
Not important	15	56	53	53
Don't know	3	0	0	1

Table 2.12: Maximum Journey Time to the Coast when Staying in the Countryside (for those indicating that access is very or quite important)

Maximum Journey time	Family with	Adults only	Either/both %	All %
	Children %	%		
Half an hour or less	67	69	63	67
Half to one hour	33	27	25	28
More than one hour	0	3	13	3
Average	33 minutes	39 minutes	44 minutes	38 minutes

Table 2.13: Importance of Access to Local Facilities such as Shops, Restaurants and Pubs when Staying in the Countryside

Access to Local Facilities is	Family with	Adults only	Either/both %	All %
	Children %	%		
Very important	49	48	41	48
Quite important	30	31	41	32
Not important	21	21	18	20
Don't know	0	0	0	0

Table 2.14: Importance of Eating Locally Produced Food when Staying in the Countryside

Eating Local Food is	Family with	Adults only	Either/both %	All %
	Children %	%		
Very important	49	53	82	54
Quite important	33	28	12	28
Not important	18	19	6	19
Don't know	0	0	0	0

Table 2.15: Interest in Buying Food from a Farm Shop

Interest	Family with	Adults only	Either/both %	All %
	Children %	%		
Would be interested	84	83	82	83
Would not be interested	9	12	0	11
Don't know	6	5	18	5

Table 2.16: Interest in Out of Season West Country Countryside Holiday or Short Break

Interest	Family with Children %	Adults only %	Either/both %	All %
Would be interested in an out of season holiday	36	52	53	51
Would be interested in an out of season short break	70	86	88	85
Don't know	9	3	12	4

Table 2.17: Activities considered for a West Country Countryside Holiday or Short Break

Interest	Family with	Adults only	Either/both %	All %
	Children %	%		
Walking	73	73	71	73
Cycling	15	6	24	7
Fishing	3	3	6	3
Golf	3	4	0	4
Pony trekking	18	1	0	3
Learning a new skill e.g.	0	1	6	1
cooking, painting etc.				
Relaxing	36	42	41	41
Visiting heritage and country	42	46	47	46
homes				
Visiting gardens	39	43	47	43
Visiting other attractions	24	20	41	21
Visiting towns and villages	21	23	29	23
Visiting the coast	39	14	41	17
None of these	0	1	0	1
Other	3	6	0	6

Table 2.18: Impact of Easily Available Activities on Destination Choice

Interest	Family with	Adults only	Either/both %	All %
	Children %	%		
More likely to visit	84	58	60	60
Not really important	13	38	41	36
Don't know	3	4	0	6

Table 2.19: Frequency of the Group Type in the Sample

Frequency	Family with Children %	Adults only %	Either/both %
Group	8	87	4

Analysis by Age

7. This analysis splits the telephone research sample between different age categories

Table 3.1: Holiday planning at time of seeing Lead Generation Campaign

Situation	16-34	35-44	45-54	55-64	65+ years
	years %	years %	years %	years %	%
Already decided to holiday in the	14	30	23	20	32
West Country					
Seriously considering holidays in	29	30	42	47	38
the West Country					
Had not seriously considered	14	0	9	7	4
taking a holiday in the West					
Country until saw campaign					
West Country one of the holiday	14	25	23	23	22
destinations considered					
No real intention of holidaying in	29	15	2	3	4
the West Country					
Don't know/can't remember	0	0	0	0	1

Table 3.2: Holiday planning at time of interview

Situation	16-34	35-44	45-54	55-64	65+ years
	years %	years %	years %	years %	%
Already taken a holiday in the	0	26	9	16	12
West Country in 2002					
Booked a holiday in the West	29	5	23	14	17
Country					
Will definitely take a holiday in	0	21	12	13	12
the West Country					
Yet to decide whether to take a	29	37	49	51	46
holiday in the West Country					
Will not take a holiday in the	29	0	5	5	10
West Country					
Don't know/can't remember	14	11	2	1	4

Table 3.3: Holiday Group Type

Group Type	16-34	35-44	45-54	55-64	65+ years
	years %	years %	years %	years %	%
Family with dependent children	43	58	17	7	1
Adults only	57	29	75	88	97
Either/both	0	13	8	5	2

Table 3.4: Age of Youngest Child (Family groups only)

Group Type	16-34	35-44	45-54	55-64	65+ years
	years %	years %	years %	years %	%
0-5 years old	100	50	13	86	0
6-11 years old	0	43	50	0	100
12-15 years old	0	7	38	14	0

Table 3.5: Previous Visits to the West Country

Previous Visits	16-34	35-44	45-54	55-64	65+ years
	years %	years %	years %	years %	%
Previous holiday in the West	57	86	90	93	96
Country					
No previous holiday in the West	43	13	10	7	4
Country					
Number of previous visits in the	last five yea	rs			
1-3	50	52	55	44	39
4-6	0	14	21	22	26
7-9	0	5	2	4	2
10+	0	0	7	9	8
None in the last five years	50	29	14	20	25
Can't remember	0	0	0	1	1

Table 3.6: Previous Staying Trips to the Countryside

Previous Visits in last 5 years	16-34	35-44	45-54	55-64	65+ years
	years %	years %	years %	years %	%
Have taken holiday or short	71	61	50	73	56
break in the UK countryside					
No holiday or short break in the	29	39	50	27	44
UK countryside					
Countryside Staying trip in the	West Country	(only those	who have tak	en UK trip)	
Have taken holiday or short	20	57	74	72	71
break in the West Country					
countryside					
No holiday or short break in the	80	43	26	28	29
West Country countryside					
Future Countryside Staying trip	in the West C	Country (only	those who ha	ave not taken	West
Country trip)					
Would consider holiday or short	83	80	90	88	81
break in the West Country					
countryside					
Would not consider holiday or	0	7	7	4	12
short break in the West Country					
countryside					
Don't know	17	13	3	8	6

Table 3.7: Preferred Countryside Accommodation Type (first choice)

Accommodation Type	16-34	35-44	45-54	55-64	65+ years
	years %	years %	years %	years %	%
Farm bed & breakfast	43	17	29	21	24
Farm self-catering	0	21	15	15	10
Farm camping/caravanning	0	4	0	4	1
Hotel/guesthouse	14	21	23	32	40
Non-farm bed & breakfast	14	8	4	5	6
Non-farm self-catering	29	8	13	9	10
Non-farm camping/caravanning	0	17	10	10	4
With friends/relatives	0	0	4	1	1
Second home	0	0	0	2	1
Other	0	4	2	2	4

Table 3.8: Accommodation on a Farm Considered (second choice)

Accommodation	16-34	35-44	45-54	55-64	65+ years
	years %	years %	years %	years %	%
Would consider staying on a	100	50	56	57	50
farm					
Would not consider staying on a	0	50	44	44	50
farm					
Preferred farm accommodation	(only those v	vho would ac	cept farm acc	ommodation	as a
second choice)					
Farm bed & breakfast	540	43	47	69	78
Farm self-catering	50	57	40	26	15
Farm camping/caravanning	0	0	7	6	3
Other	0	0	7	0	5

Table 3.9: Motivations for Visiting a Farm

Motivation	16-34	35-44	45-54	55-64	65+ years
	years %	years %	years %	years %	%
Warmth of welcome	14	18	33	36	51
Animals	43	18	28	22	19
Quality of food	29	6	28	15	29
Being in the heart of the country	29	24	33	57	51
Relaxing	0	24	31	33	40
Involvement in farm activities	0	12	11	3	1
Good for children	43	47	19	4	4
Other	0	6	8	9	6

Table 3.10: Impact of environmentally sustainable practices on farms

Impact	16-34	35-44	45-54	55-64	65+ years
	years %	years %	years %	years %	%
More likely to choose farms that	100	94	72	88	77
were making efforts to preserve					
the environment					
No more likely to choose farms	0	0	14	3	12
that were making efforts to					
preserve the environment					
Don't know	0	6	14	9	11

Table 3.11: Importance of Access to the Coast when Staying in the Countryside

Access to the coast is	16-34	35-44	45-54	55-64	65+ years
	years %	years %	years %	years %	%
Very important	29	58	15	25	23
Quite important	29	17	29	24	20
Not important	43	21	54	51	57
Don't know	0	4	2	0	0

Table 3.12: Maximum Journey Time to the Coast when Staying in the Countryside (for those indicating that access is very or quite important)

Maximum Journey time	16-34	35-44	45-54	55-64	65+ years
	years %	years %	years %	years %	%
Half an hour or less	75	67	57	78	66
Half to one hour	25	28	43	20	30
More than one hour	0	6	0	2	4
Average	30 minutes	34 minutes	38 minutes	32 minutes	44 minutes

Table 3.13: Importance of Access to Local Facilities such as Shops, Restaurants and Pubs when Staying in the Countryside

Access to Local Facilities is	16-34	16-34 35-44		55-64	65+ years
	years %	years %	years %	years %	%
Very important	43	50	48	47	49
Quite important	0	33	27	36	30
Not important	57	17	25	17	22
Don't know	0	0	0	1	0

Table 3.14: Importance of Eating Locally Produced Food when Staying in the Countryside

			, ,		
Eating Local Food is	16-34	16-34 35-44		55-64	65+ years
	years %	years %	years %	years %	%
Very important	29	63	44	57	54
Quite important	29	21	33	27	27
Not important	43	17	23	15	19
Don't know	0	0	0	1	0

Table 3.15: Interest in Buying Food from a Farm Shop

Interest	16-34	35-44	45-54	55-64	65+ years
	years %	years %	years %	years %	%
Would be interested	100	87	85	84	80
Would not be interested	0	9	8	10	14
Don't know	0	4	6	6	6

Table 3.16: Interest in Out of Season West Country Countryside Holiday or Short Break

Interest	16-34	35-44 45-54 years % years %		55-64	65+ years %
	years %	years %	years %	years %	70
Would be interested in an out of	29	33	39	56	53
season holiday					
Would be interested in an out of	86	83	77	90	84
season short break					
Don't know	0	4	4	4	5

Table 3.17: Activities considered for a West Country Countryside Holiday or Short Break

Interest	16-34	35-44	45-54	55-64	65+ years
	years %	years %	years %	years %	%
Walking	100	71	75	86	66
Cycling	29	25	15	5	3
Fishing	0	4	4	5	1
Golf	29	0	4	2	4
Pony trekking	29	13	4	1	1
Learning a new skill e.g.	0	4	2	0	1
cooking, painting etc.					
Relaxing	14	46	33	41	44
Visiting heritage and country	29	42	42	42	49
homes					
Visiting gardens	43	33	44	42	44
Visiting other attractions	14	29	21	17	22
Visiting towns and villages	14	21	27	15	26
Visiting the coast	71	50	15	10	15
None of these	0	0	0	0	1
Other	0	0	4	4	8

Table 3.18: Impact of Easily Available Activities on Destination Choice

Interest	16-34 years %	35-44 years %	45-54 years %	55-64 years %	65+ years %
More likely to visit	86	79	60	64	56
Not really important	14	17	38	35	40
Don't know	0	4	2	2	5

Table 3.19: Holiday Type

Interest	16-34 years %	35-44 years %	45-54 years %	55-64 years %	65+ years %
Countryside holiday	43	54	67	68	61
Farm holiday	57	46	33	32	39

Table 3.20: Frequency of the different Age Groups in the Sample

Frequency	16-34	35-44	45-54	55-64	65+ years	
	years %	years %	years %	years %	%	
Group	2	6	12	26	54	

Analysis by Socio-economic Group

8. This analysis splits the telephone research sample between different occupation-based socio-economic groups.

Table 4.1: Holiday planning at time of seeing Lead Generation Campaign

Situation	Α	В	C1	C2	D	E
Already decided to holiday in the	39	29	24	17	56	25
West Country						
Seriously considering holidays in	29	38	48	47	38	63
the West Country						
Had not seriously considered	2	6	5	5	0	0
taking a holiday in the West						
Country until saw campaign						
West Country one of the holiday	29	23	21	23	0	13
destinations considered						
No real intention of holidaying in	0	5	1	8	6	0
the West Country						
Don't know/can't remember	0	0	1	2	0	0

Table 4.2: Holiday planning at time of interview

Situation	Α	В	C1	C2	D	E
Already taken a holiday in the	12	11	17	11	25	13
West Country in 2002						
Booked a holiday in the West	20	19	17	17	25	13
Country						
Will definitely take a holiday in	5	15	16	8	13	0
the West Country						
Yet to decide whether to take a	29	39	46	52	31	50
holiday in the West Country						
Will not take a holiday in the	2	14	2	8	6	13
West Country						
Don't know/can't remember	2	2	2	6	0	13

Table 4.3: Holiday Group Type

Group Type	Α	В	C1	C2	D	E
Family with dependent children	7	9	5	10	20	13
Adults only	93	87	91	83	80	88
Either/both	0	4	4	7	0	0

Table 4.4: Age of Youngest Child (Family groups only)

Group Type	Α	В	C1	C2	D	E
0-5 years old	33	67	40	57	67	100
6-11 years old	33	22	60	29	0	0
12-15 years old	33	11	0	14	33	0

Table 4.5: Previous Visits to the West Country

Previous Visits	Α	В	C1	C2	D	E			
Previous holiday in the West	93	97	98	91	94	88			
Country									
No previous holiday in the West	7	3	2	9	6	13			
Country									
Number of previous visits in the last five years									
1-3	40	40	51	40	40	14			
4-6	25	27	19	33	0	29			
7-9	3	4	4	0	0	0			
10+	10	8	7	3	7	0			
None in the last five years	20	20	19	24	53	57			
Can't remember	3	1	0	0	0	0			

Table 4.6: Previous Staying Trips to the Countryside

Previous Visits in last 5 years	Α	В	C1	C2	D	E			
Have taken holiday or short	61	57	65	64	44	63			
break in the UK countryside									
No holiday or short break in the	40	43	35	36	56	38			
UK countryside									
Countryside Staying trip in the West Country (only those who have taken UK trip)									
Have taken holiday or short	77	74	65	71	50	40			
break in the West Country									
countryside									
No holiday or short break in the	23	26	65	29	50	60			
West Country countryside									
Future Countryside Staying trip	in the Wes	t Country (only those	who have r	not taken W	/est			
Country trip)									
Would consider holiday or short	96	86	84	90	75	83			
break in the West Country									
countryside									
Would not consider holiday or	4	7	11	8	8	17			
short break in the West Country									
countryside									
Don't know	0	7	5	3	17	0			

Table 4.7: Preferred Countryside Accommodation Type (first choice)

Accommodation Type	Α	В	C1	C2	D	E
Farm bed & breakfast	24	23	30	20	40	38
Farm self-catering	9	11	14	14	13	13
Farm camping/caravanning	0	2	1	4	0	0
Hotel/guesthouse	36	31	34	29	13	38
Non-farm bed & breakfast	7	3	4	11	7	0
Non-farm self-catering	16	14	9	7	13	13
Non-farm camping/caravanning	7	9	2	7	7	0
With friends/relatives	2	0	1	1	7	0
Second home	0	1	2	1	0	0
Other	0	6	3	4	0	0

Table 4.8: Accommodation on a Farm Considered (second choice)

Accommodation	Α	В	C1	C2	D	E		
Would consider staying on a	57	62	48	49	71	50		
farm								
Would not consider staying on a	43	38	52	51	29	50		
farm								
Preferred farm accommodation (only those who would accept farm accommodation as a								
second choice)								
Farm bed & breakfast	65	67	77	67	40	50		
Farm self-catering	29	31	12	19	60	50		
Farm camping/caravanning	6	3	4	5	00	0		
Other	0	0	8	10	0	0		

Table 4.9: Motivations for Visiting a Farm

Motivation	Α	В	C1	C2	D	E
Warmth of welcome	53	33	44	46	31	33
Animals	19	16	27	25	15	67
Quality of food	22	19	30	23	8	50
Being in the heart of the country	53	48	43	54	39	33
Relaxing	34	44	34	25	31	0
Involvement in farm activities	0	5	1	6	8	0
Good for children	3	7	13	13	23	17
Other	3	11	6	6	8	0

Table 4.10: Impact of environmentally sustainable practices on farms

Impact	Α	В	C1	C2	D	E
More likely to choose farms that	72	80	80	83	85	100
were making efforts to preserve						
the environment						
No more likely to choose farms	19	7	10	6	8	0
that were making efforts to						
preserve the environment						
Don't know	9	13	10	10	8	0

Table 4.11: Importance of Access to the Coast when Staying in the Countryside

Access to the coast is	Α	В	C1	C2	D	E
Very important	22	23	21	27	40	25
Quite important	29	21	25	21	27	0
Not important	49	56	53	51	33	63
Don't know	0	0	1	0	0	13

Table 4.12: Maximum Journey Time to the Coast when Staying in the Countryside (for those indicating that access is very or quite important)

Maximum Journey time	Α	В	C1	C2	D	E
Half an hour or less	70	70	57	74	70	50
Half to one hour	26	28	39	21	30	50
More than one hour	4	2	5	6	0	0
Average	31	43	35	43	37	45
	minutes	minutes	minutes	minutes	minutes	minutes

Table 4.13: Importance of Access to Local Facilities such as Shops, Restaurants and Pubs when Staying in the Countryside

Access to Local Facilities is	Α	В	C1	C2	D	E
Very important	51	49	41	44	60	63
Quite important	31	31	40	27	20	25
Not important	18	20	19	29	20	13
Don't know	0	0	0	0	0	0

Table 4.14: Importance of Eating Locally Produced Food when Staying in the Countryside

Eating Local Food is	Α	В	C1	C2	D	E
Veryimportant	49	51	50	60	56	75
Quite important	24	30	28	26	31	0
Not important	27	19	21	14	13	25
Don't know	0	0	1	0	0	0

Table 4.15: Interest in Buying Food from a Farm Shop

Interest	Α	В	C1	C2	D	E
Would be interested	82	86	81	87	94	75
Would not be interested	18	11	12	7	0	13
Don't know	0	3	7	4	6	13

Table 4.16: Interest in Out of Season West Country Countryside Holiday or Short Break

Interest	Α	В	C1	C2	D	E
Would be interested in an out of	58	56	52	43	38	75
season holiday						
Would be interested in an out of	84	86	88	83	94	88
season short break						
Don't know	4	4	1	3	0	0

Table 4.17: Activities considered for a West Country Countryside Holiday or Short Break

Interest	Α	В	C1	C2	D	E
Walking	71	68	76	76	75	100
Cycling	9	3	5	9	13	13
Fishing	0	3	1	4	13	0
Golf	4	4	4	1	13	13
Pony trekking	2	0	5	3	13	0
Learning a new skill e.g.	0	1	1	1	0	0
cooking, painting etc.						
Relaxing	44	37	45	46	19	50
Visiting heritage and country	56	49	41	51	31	50
homes						
Visiting gardens	58	46	39	50	25	25
Visiting other attractions	29	21	17	30	0	25
Visiting towns and villages	33	23	19	24	13	25
Visiting the coast	22	13	13	24	19	13
None of these	0	0	0	0	0	13
Other	9	7	7	3	6	13

Table 4.18: Impact of Easily Available Activities on Destination Choice

Interest	Α	В	C1	C2	D	E
More likely to visit	64	63	64	49	63	75
Not really important	36	34	32	49	31	25
Don't know	0	3	4	3	6	0

Table 4.19: Frequency of the different Socio-economic Groups in the Sample

Frequency	Α	В	C1	C2	D	E
Group	13	30	29	21	5	2

APPENDIX 3 FOCUS GROUP RESEARCH

Focus Groups - Aims & Objectives

- As part of a wider study conducted by Atlantic Consultants on behalf of South West Tourism, Chapelhouse Research was commissioned to undertake a small qualitative element comprising two discussion groups among past and potential South West visitors.
- In the study, South West Tourism wished to determine existing and future market demand for rural and farm tourism. The specific requirement was to ascertain the perceptions of, and attitudes towards aspects of farm tourism among the resident population of two key geographical areas, the Midlands and the South East, and to examine where farm and rural tourism featured within the context of both future holiday planning and past experience.
- 6.86 Main objectives were to:
 - ?? Ascertain visitors' perspectives on the difference between farm and other rural based tourism;
 - ?? Determine their propensity to visit farms and/or other SW rural tourism locations;
 - ?? Compare farm and rural holidays in the South West with those offered elsewhere in the UK and abroad:
 - ?? Determine levels of enthusiasm for special interest holidays, and ascertain what types of holidays would most inspire a SW-based booking;
 - ?? Understand and explore accommodation choices, and any changing requirements;
 - ?? Understand visitors' expectations of facilities for both serviced accommodation and self catering;
 - ?? Ascertain the relative importance of nearby facilities such as shops, pubs and public transport;
 - ?? Determine the importance of local produce availability and offer;
 - ?? Explore and understand how SW rural holidays are sourced and booked;
 - ?? Determine the importance and effectiveness of the internet in the sourcing and booking process.

Background/Method

6.87 Two full sized qualitative discussion groups (9-10 respondents each) were conducted:

Group One - Sutton Coldfield, West Midlands.

Respondents aged 25-45 with dependent children.

BC1.

Mixed sex.

Group Two – Windsor.

Respondents aged over 50 with no dependent children.

BC1.

Mixed sex.

- 6.88 In both groups, certain stipulations were to be met in addition:
 - ?? That respondents had all either taken a South West based holiday in the last 5 years;
 - ?? Or that they were highly likely to consider a South West based holiday, in the next 18 months;
 - ?? That they were a major or joint decision maker in deciding on, and booking, holidays for their family.

Research Findings

Analysing the findings

- 6.89 Qualitative analysis involves the identification and exploration of consensus views across all research groups, and the report is based on these findings. The outcomes cited are, therefore, representative of the views of the majority of respondents as seen across both groups, unless on any key issue there was a clear difference between the groups. Sometimes, a marginalized view might also be given as it is interesting or provides a foil, but these views are always indicated as being representative of only one or two respondents.
- 6.90 It is important to note that in this instance only two groups were conducted, and these were segregated by both location and age group. Therefore, where views differ from one group to another, we cannot say with any certainty that either 'this is because of age difference' or, 'this is because of geographical bias'. We can only take these groups at face value and it is especially important not to make geographical assumptions based on just the one group. It is more likely that the main differences were age and lifestage related. Verbatim comments are cited in italics for ease of identification, throughout.
- 6.91 The outline of topics in this report follows the order of the agreed discussion guide, therefore the issues start 'broad based' and become more specific to farm and rural tourism as the report progresses.

South West Holidays Taken

- 6.92 In both younger and older groups, almost all had already taken a South West based holiday in the last 5 years, and many still featured the South West in their annual holiday and leisure (short stay) plans.
- 6.93 It is important to note, though, that by 'South West', most thought primarily of Devon, Cornwall and Dorset rather than the other counties we referred to in the topic guide. This, and the reasoning for it, is discussed later in this section. It is in this light that comments about the 'South West' or 'South West Countryside' should be interpreted throughout the report. There was intention by all respondents to return to the South West (Devon, Cornwall, Dorset...) on future holidays, and there was absolutely no feeling about needing to source new holiday destinations elsewhere in the UK:

As long as we continue to enjoy it, I don't have a problem with visiting the same place twice. There are always new things to see and do.

You can always do a new part of the same county, can't you?

6.94 A South West holiday might constitute the main holiday of the year for many, especially for younger respondents who were strapped for cash as they brought up their children.

It would be nice to...be able to afford...but we are happy as we are for now.

- 6.95 The counties of **Devon and Cornwall** were by far the most frequented by both age groups, but **Dorset** was also popular. Respondents who had been to these counties showed propensity to visit both the larger towns and small villages or rural locations, equally.
- 6.96 All three counties were popular as either a holiday or short stay; most older respondents felt they would visit for between two days and one week maximum, while for younger visitors an even longer stay was a possibility with the coastline offering plenty for children of all ages to do.

We have been to Poole, Weymouth...in a caravan but also with excursions...and we have stayed on farms, self catering. The seaside is important to us. (Young).

For us, it was English Country Cottages and Cornish fishing cottages... (Young).

We did a self catering chalet in Dorset. (Young).

We have taken short breaks to Barnstaple, Sidmouth, St. Austell, Bournemouth (Older).

I like walking holidays, especially rural ones on Dartmoor and Exmoor, and places like Selworthy. (Older).

We have stayed in Helston for its quaint village feel, and Dulverton, for its walking and countryside, recently. (Older)

- 6.97 The major draw to these counties for all respondents, was their convivial mix of countryside and tranquillity, 'getting away from it all', and coast. Without the coast, many (especially those with children) could not easily see any county as offering true holiday potential. However, the coast was also quite important to older respondents.
- 6.98 Wiltshire and Gloucestershire, while 'nice for a short break or day trip', were not really considered to be 'the true South West' and were less likely to feature as holiday destinations. Both Wiltshire and Gloucestershire were for many 'too inland' as cited above.
- 6.99 For those from the Midlands, Gloucestershire also suffered from being 'not South Westerly enough', while for the Windsor group, it was thought to be less accessible than Devon and Cornwall.

I think of Gloucestershire as being more Midlands. (Young)

6.100 One or two in each group thought there were fewer places of interest in Gloucestershire and Wiltshire:

It is nice to go but just to spend a day.

There is not a lot to do when you get there.

- 6.101 Somerset was a little too close by to be considered 'South Western' for those from the Midlands, while several in Windsor saw Somerset as belonging to the South West but being 'too touristy...the historic towns are too busy'. Or, for many, it was 'too difficult to park'. For most, Somerset equated to the historic towns of Bath, Wells etc., and less so to the countryside.
- 6.102 However, all conceded that both Gloucestershire and Somerset offered many enticing things to do on a day trip or weekend, and that they offered good local produce to take home.
- 6.103 Lastly, a major draw of especially Devon and Cornwall for both groups, was the perception that they are likely to offer good weather. Most seemed to be sun-chasers (as emerged later when we discussed how South Western holidays compared to overseas destinations...).

If the weather is nice, you will enjoy it whatever you do.

If the weather is bad, then everything is spoiled.

- 6.104 All agreed there was plenty to see and do in the South West (especially Devon, Cornwall and Dorset) if the weather was wet or cold, as long as you are there at the right time of year and everything is open.
- 6.105 One younger respondent felt that weather and accommodation were equal factors in success or failure of a South West holiday:

If the weather's bad...and the accommodation's also bad, you might as well go home. You have to have one or the other, preferably both, to enjoy it.

Attitudes to Countryside/Rural Holidays

- 6.106 The majority already had experience of taking countryside holidays in the South West on several occasions.
- 6.107 All enthused about countryside-based holidays, but both age groups said they preferred to take countryside holidays with easy access to the sea, than to take purely inland holidays, where possible.
- 6.108 Only one or two really enjoyed the countryside enough to want to be really out in the sticks and not desire to travel to the coast or town. It was essential to young families that a clean and safe, child friendly coastline was accessible within a very short drive.
- 6.109 Countryside holidays were not chosen, therefore, specifically for remoteness.

It is nice to be away from it all but still have everything accessible if you want it.

I wouldn't be happy to be in the middle of nowhere.

My husband has to be able to walk to the pub!

- 6.110 Hence, although most agreed it was appealing to have accommodation based in the countryside, younger respondents especially felt that they would use this as a base and not necessarily spend too much time in rural surroundings in the daytime. Retired respondents would largely agree with this, though they did seem more inclined to take fuller advantage of their immediate surroundings for walking and eating out, before exploring wider.
- 6.111 Proximity to larger towns was also desirable to both age groups, as a centre for shopping and leisurely browsing, especially in case bad weather set in.
- 6.112 However, all felt this was not an issue as far as much of the South West is concerned:

In that part of the world, you have everything...the countryside, sea and villages or towns of interest.

There aren't many areas of Devon, Cornwall or Dorset where you don't get a good mix of it all.

- 6.113 Of course though, the need for coastal proximity again worked against Wiltshire, Somerset and Gloucestershire.
- 6.114 It was interesting to note that, although coast and town were important to everybody, almost all preferred their accommodation to be **based rurally** and to travel to coast or town, than vice versa. Relaxation at the end of the day was the most important factor in this decision.

You want to know that you can leave the town behind in the evening and have a really quiet, peaceful night.

We live in a town ourselves so when we have a holiday, it has to be free of hustle and bustle.

6.115 Almost all agreed that a South West countryside holiday (here, they were thinking of Devon, Cornwall and Dorset) was really for a short break, or up to one week's duration. Younger families, as stated earlier, considered staying longer but only with easy proximity to the sea. Countryside holidays in Wiltshire, Somerset and Gloucestershire were for a shorter duration of just two to three nights.

Imagery Associated with 'Countryside'

6.116 For the majority, the South Western countryside equates to only positive associations (in approximate order of priority):

- ?? Tranquillity/peace and quiet, getting away from it all.
- ?? Relaxation/de-stressing.
- ?? Slower pace of life.
- ?? Scenery.
- ?? Walks and countryside/coastal paths.
- ?? Community feel and welcome.
- ?? Good food (not only synonymous, though, with countryside).
- 6.117 To a lesser extent (i.e. suggested by just one, and agreed with by others in younger group only), further associations were thatch, and tradition.
- 6.118 Only the younger group equated 'countryside' with 'farmyards' or 'agriculture' on a spontaneous level. Younger respondents thought that farms and countryside sights, sounds and smells were an intrinsic part of the rural experience. The younger group also thought that a countryside base offered greater safety and freedom for the children, 'in that respect, better than being by the beach where you have to watch them all the time'.
- 6.119 When asked what were the 'best aspects' of a countryside holiday, most thought fresh air, small community, scenery and nice walks.
- 6.120 South West 'countryside dwellers' were invariably considered friendly, warm and welcoming. Several superlatives were used:

Fabulous people
Salt of the earth.
Will go out of their way for you.

6.121 However, one (older) added:

They can be too friendly...can't get rid of them...will come and start telling you about the area when you just want a quiet pint.

Who Typically Takes SW Countryside Holidays?

6.122 Everyone agreed that the 'typical' countryside visitor to the South West would probably be either retired (for walking, relaxation, scenery and sightseeing), or a young couple with a young family (safe, plenty of visitor attractions, relaxing, proximity to beach). Some felt there was perhaps not enough to keep young couples without children, or singles, entertained. Plus, one younger respondent said that the cost of UK holidays per se might dissuade younger people from holidaying here, rather than travelling abroad (which becomes ever more accessible and cost effective).

6.123 Several perceived the South West to be enticing to people in these lifestages in particular, because *both groups want accessibility...I mean, Devon's just a couple of hours from here* (Older, Windsor). The majority in both groups, despite the perception of accessibility, however, considered they were very unlikely to make a spontaneous trip and would wish to pre-plan and book in the same way as for any other holiday.

You'd plan for Cornwall the same as you would for France, because in time terms you can be in France in the same time.

6.124 Only one respondent (female, older) said she would *sometimes phone the night before or a couple of nights before, and just go on the spur of the moment.*

How does Countryside Compare to Coast and Town?

- 6.125 All respondents but one, thought a countryside holiday beat a town based holiday 'hands down' in terms of delivering the kind of setting they needed for relaxation.
- 6.126 Most perceived coast and town to be busier and more hectic, perhaps delivering the kind of stresses they wanted to have left behind. The positives of both coast and town for a day out, were appreciated, however.

We were down in Marazion. It was like a scrum trying to get anything to eat in the evening.

The coast gets too busy for me. I have to fight the crowds in Windsor so like to keep away from the tourist places like popular seaside resorts and towns; so the country suits me.

It is nice to stay in the country and have the town nearby, so you can dip in and then opt out again!

We live in historic Windsor so I have seen quite enough of historic towns!

6.127 The agreed view was that a countryside based holiday was more certain to deliver peace and quiet, and for you to feel relaxed at the end of it. Only one sought the town rather than the countryside, as a base:

Personally I relax enough in Windsor so when I go away, I want to **do something** and be in among it all. (Older).

6.128 It was difficult for respondents to say what the countryside 'does better' than town or coast, aside from tranquillity. However, the countryside was also valued for *bringing you close to...a more traditional way of life* and better than towns or coast for *variety of scenery and walks*.

How Does a South West Countryside Holiday Compare with other UK Countryside Destinations?

6.129 Both age groups felt that the South West had an immediate advantage in the weather and climate probably being more reliable in the South West, than other UK locations.

The sea is freezing cold in the North so that is no good for the kids.

6.130 However, it also had the advantage of being more accessible for many in both regions:

The motorway links are good so it seems a natural choice to go there from Birmingham. Easier to get to.

6.131 Other natural choices for UK countryside holidays were Wales, Cumbria ('The Lake District') and Scotland. Having said this, though, most had only holidayed in the South West so far.

There's not really a need to go out of the area as it is so close by.

I would only go to the lakes for a change...if I got bored with Cornwall.

6.132 One young respondent liked the South West in preference to other UK destinations because it brings back memories of my own childhood. Others agreed. Two young respondents thought the South West was better provided with activities and visitor attractions than competitor destinations.

How Does a South West Countryside Holiday Compare with other European Destinations?

- 6.133 The majority was animated at the prospect of a holiday in France or Italy. The main drivers were climate and (less important) experiencing a different culture. Everyone also agreed that children were especially well catered for in France, and that the food was more enticing than being in the UK generally.
- 6.134 One younger respondent felt that children were safer if they were cycling on rural roads in France than in the UK; others agreed.

They are more geared up for cyclists. And the roads are quieter.

6.135 However, all things considered, a holiday in France or Italy was overall less appealing than a South West holiday for most, since the ease of *jumping in the car and being there in a couple of hours would override other things*.

If you have dogs it's not so attractive as the South West.

For those with children especially, budget was a primary consideration.

Only if you have the money to spend on flights...can you get to France in the same time....but it's still not as easy.

There is now the choice of...going to East Midlands Airport and you're there in the same time as down to Cornwall. But you have to have the money if you're booking ahead and at peak time.

6.136 The familiarity of the South West was also, somehow, reassuring:

But anyway, it's quite nice to go back year on year and feel like it's a second home.

Facilities Required & Expected

- 6.137 Respondents were asked 'if you were staying in the countryside, what other facilities would you look for, as well as somewhere nice to stay?'
- 6.138 Comfortable accommodation was by far the most important factor and continued to be mentioned in both groups despite assurances that we would discuss this later!
- 6.139 Following on from this, also important were:
 - ?? **Younger group:** swimming, child friendly eating out, farms, child oriented activities (cycle hire, parks, theme parks), castles/historical sites, towns and shopping, and local markets.

Pubs with a decent meal, varied menu and a beer garden.

To this group, it was also very important that a large degree of freedom was maintained on the holiday, i.e. that accommodation *allows us to do our own thing*.

?? For the **older group**, important were (again after accommodation): gardens, leisurely walks, craft centres, stately homes, NT and EH, historic towns and shopping (smaller, independent shops with local craft, galleries etc), good local produce and 'homemade' foods, mix of good quality eateries, markets. Less critically, a few also desired entertainment (shows, ceilidhs or other dancing possibly in local pubs/village hall), and ample car parking.

Nice to see the local cattle markets.

Something representative of the region, that you might not see anywhere else.

The light in Cornwall is so good...they have excellent galleries.

6.140 Across both groups, only one (older respondent) placed any emphasis on public transport provisions.

I wouldn't say public transport is a consideration...it's a challenge! Once you get on you can't get off again cos' it goes all round the houses!

6.141 All others relied on their own cars and cycles (hired by older, but often taken from home by younger respondents).

6.142 Shops in close proximity were crucial to younger respondents mostly for buying daily provisions, since many would elect self catering accommodation. Produce would usually be bought locally and not brought from home.

You would want a shop within a few miles' drive.

- 6.143 Shops for browsing were less important to this age group, than other types of amenities, though local markets were appealing.
- 6.144 Older respondents also required a local shop for self catering but really appreciated historic towns and villages for their individual, unusual shops reflecting local craft.

I like..to see shops or craft centres where they make local cheese, chocolates, pottery etc.

We're just wanting to mooch...browse really leisurely.

It is nice when you have the smaller shops, not those you get in every town everywhere. Things local to the area.

Accommodation Needs and Preferences

Younger with Kids

- 6.145 Younger respondents invariably preferred some form of self catering accommodation, usually a chalet or cottage, or less frequently, a caravan. One or two had stayed in hotels and B&B, but this was the exception rather than 'the norm'.
- 6.146 Young respondents agreed staying in hotels was difficult with children, and there was less freedom to come and go.

You have to breakfast at set times, and get back for the evening meal...it restricts your travelling.

- 6.147 A major concern was *what if the kids break something?* This would also emerge as a concern later, when we discussed farm accommodation. Younger respondents also disliked the habit of English B&B's of *asking you to get out during the day! If it is a really bad day you can be left wandering with nowhere to go!* Hence, B&B would only be considered for a short break.
- 6.148 Several (4-5 in group) mentioned their desire to maintain freedom and self catering, but to be staying somewhere where there's evening entertainment...so you get the best of both worlds.
- 6.149 This led naturally to the preference for self catering chalets or conversions within a larger, serviced complex *where you still have all mod cons and things for adults to do when the kids are sleeping.* This appealed more than an 'isolated' cottage or caravan, and was likely to provide the swimming pool many sought for their children.

6.150 Entertaining the adults and older children was more important on a serviced site, than entertaining small children, because:

You can take a lot with you for smaller children. Like, games and toys. But if it is too early for a 12 year old to go to bed, you want to be eating out or seeing a show.

6.151 Just one younger respondent felt that while the children were small, he would prefer to take advantage of luxury hotels:

Very small kids can fit in with adults' plans. They won't object...you need to do this while you can.

6.152 Young respondents required very child friendly premises with obvious dangers removed; no glass doors, secure stairways, stair gates, no open water nearby.

And it doesn't help if they have antiques there...you should be made to know about that in advance.

- 6.153 Aside from this, accommodation just needed to be clean, hygienic and friendly with a good quality breakfast (if part of the provision). Basic level accommodation was acceptable, with a comfortable bed but otherwise no particular 'frills'. Some preferred to be even without TV because we can have that at home.
- 6.154 An en-suite was desirable, but in B&B it was accepted that sometimes this is not offered. In that case, standards of cleanliness needed to be especially high.

TV documentaries...make you particularly aware of poor hygiene.

- 6.155 There was a feeling that in self catering accommodation *you get what you're given, it's put up and shut up,* whereas in a hotel or better B&B a complaint might be attended to and sorted out more satisfactorily.
- 6.156 It was not automatically assumed that 'countryside accommodation' would be necessarily basic, though a basic level of accommodation was suitable for them personally. All agreed that in the countryside just as in the town, a wide variety of accommodation was available to suit all tastes and pockets. Even B&B's were thought to vary widely in product offer and standards.
- 6.157 Staying on a farm, as opposed to other forms of accommodation, was not mentioned on a spontaneous level by younger attendees.

Older Group

- 6.158 Like younger respondents, the older group placed emphasis on clean, hygienic and comfortable accommodation with no luxuries, but they also felt that 'countryside' need not equal basic if a higher standard of accommodation was desired. They were most likely to choose B&B.
- 6.159 Some of the older group required a TV set, and all would want tea and coffee making facilities in their room but no real added extras (in fact two saw even tea and coffee facilities as 'a little extra'). However, an en-suite was highly desirable and many would be disappointed to share bathroom facilities in their B&B.
- 6.160 Of primary importance was a good warm welcome, and not just on the day of arrival. Some did feel that B&Bs have a habit of making you *feel unwelcome...especially if you are in the residents' lounge*.

You feel as if you shouldn't be there.

6.161 A good standard of cooking in the B&B was expected, especially at breakfast.

And you would like to think it'd be local, fresh bacon and egg.

6.162 Six of the group had stayed primarily in reasonable to high quality B&B or small informal hotels, though four preferred self catering.

Hotels and B&Bs are only nice until you want to do something a bit different, get up late or taker the dog with you, or come in later.

6.163 Hotel groups were not synonymous with countryside holidays for most:

They are a bit formal, all chrome...too mod con...

I think in some way you want to feel closer to the countryside, than you do in larger hotels.

You could be anywhere in the country! They are all the same inside.

6.164 B&B's were liked because they were seen as friendly and homely, and offering mostly a good location for touring and sightseeing.

They reflect the locality…local tour books and newspapers, lists of things to see and do, and they will try to give you local food.

6.165 The older group objected less to their 'restrictive' nature:

They are nice because you can eat in or out. Nobody forces you to eat in if you don't want.

6.166 Several had stayed in a caravan in younger days, but not lately. However, it was acknowledged by one that some caravans are more comfortable than B&Bs!

6.167 The bane of everyone's holiday was undoubtedly the old and uncomfortable B&B bed!

But you can't complain because they are so nice to you!

I would not want them to get worse than they are now.

6.168 Only one respondent mentioned staying in 'a holiday camp', which he found desirable as entertainment was provided. Others preferred a more subdued and sedate holiday. There was some discussion around staying on a camp site with facilities provided, but most felt this was for younger people only.

But they are not hi-de-hi!

I don't like the idea of enforced entertainment.

Staying on a Farm

- 6.169 This section is segmented into three parts since in some respects the views of young and older differed.
- 6.170 These separate views are highlighted, then commonly held views shared by both age groups are expanded on at the end.

Younger Respondents – Basic Attitudes

6.171 Staying on a farm was not proactively mentioned as an accommodation type. However, on suggestion, most became animated and enthusiastic, and considered it was something they would really like to do with the children.

Especially on a working farm!

6.172 In fact, five had already experienced at least one such holiday and found it highly enjoyable.

We used to go twice a year...loved the countryside, and we worked on the farms.

(It was) more of a working holiday...but we would go again.

We ate our meals with the family, were taken care of really well. I enjoyed the noises and the smells...we would definitely do it again.

6.173 Those who had tried the farm holiday, thought it superb value for money and highly educational. However, they did not all consider it an easy option and ventured: *it can be hard work*.

It was not what I'd call a holiday, really.

You were woken really early by the cockerel. There was no sleeping in!

6.174	Those who had not yet holidayed on the farm, considered both positives and negatives. On the one
	hand, they knew their children would really enjoy the experience, and recognised that it would be a
	wholly different holiday to anything they had done before so it would be exciting.

6.175	Yet they	also thou	aht it may	be more	work than	relaxation:

You work hard all year...so you want the best comforts.

6.176 Most wanted to observe the farming practices, rather than necessarily help out themselves.

Maybe just for a day, stay behind and do something on the farm.

But you wouldn't usually want to stay there in the day, just use it as a base.

6.177 Another perceived downside was the notion of danger. It was agreed *there would have to be some risk assessment.*

I would be fearful of any water...pools, ponds, large reserves of water.

There is all the machinery.

Fires.

Disease.

6.178 One respondent felt there may be insufficient to keep children amused after a few days:

I think you would also need something specially for the kids on site, a play area, swings and so on.

6.179 Another added his own concern that the children might be in the way or cause damage, and others agreed:

We are talking working farm here. It is a business, not a playground.

I'm sure the farmers have better things...than entertain my kids.

You can't relax with the kids in someone else's home. You'd be on tenterhooks all the time.

A holiday is when you're away yet almost at home.

6.180 Despite all the perceived downsides, however, the consensus was that a farm holiday in the South West would be highly attractive but would just mean that *you would have to really look into it, what kind of farm it was etc.*

6.181 As for older people, the younger group perceived that a farm welcome would surpass what you'd get elsewhere. Because, farm people respect what's given to them...show more appreciation.

They are hospitable and take an interest in you.

6.182 Best aspects of staying on a farm would be the warmth of welcome, standard of home cooking (if not self catering), the sights, sounds and smells, and the farm environment as a learning experience. These were considered to give the farm holiday the edge over other countryside accommodation. However, the other key factors, 'slow pace of life' and 'tranquillity' could probably be gained equally in other rural accommodation. As in the older group, it was also recognised that 'slow pace of life' is not necessarily true of modern farming and the stresses it is placed under.

Farmers have a higher suicide rate...

Struggling to survive.

- 6.183 (One or two considered there was a feel-good-factor in supporting farmers at this difficult time, though this would not be sufficient reason to book a farm accommodation over another type.)
- 6.184 As was the case in the older group, there were split opinions on the desirability of integration within the farmhouse (with the host's family) as opposed to being accommodated separately on the farm premises. All agreed space and privacy was important but at the same time, home made cooking enticed tired parents towards the farmhouse kitchen at least!
- 6.185 However, the idea of self catering away from the farmhouse and host family became more attractive as the discussion progressed.

Self catering...you have your own space and don't need to be as strict with the kids.

It's better when you can do as you please.

6.186 Most agreed the best would be, a choice of whether to be with the family or not...and whether to eat with them.

Older Group - Basic Attitudes

6.187 Only one person had spontaneously mentioned having stayed in a farmhouse, but this was in younger days and when accompanied by children. On a prompted basis most others had also experienced a farm stay when younger, though not necessarily in the South West. For everyone, it had been a very positive experience and one they would love to repeat.

I stayed at Holsworthy...farm buildings converted to cottages. Some 40 people...there, it was the best holiday I've ever had.

6.188 This respondent had especially valued the fact that there were lots of families staying simultaneously, and that a good atmosphere was created and friendships formed.

Everyone was so friendly and all got together in the evening, talking.

6.189 Others also reminisced about the positives:

They were trusting...we were part of the family. You could help yourself to drinks.

It was a home from home.

Brilliant, fabulous!

The farmer said, when my wife has a day off, we have a barbecue...so we had a barbecue and everyone had to help prepare it. It was really good fun.

6.190 The older group did have a difficulty in talking about farm holidays from their own perspective (i.e. for themselves, now), rather than from the perspective of a young family, as this seems to be where the farm holiday was pitched in their own minds.

Lots of young people take farm holidays. It is ideal for the children.

When I was younger we often did farm holidays with the children.

I think it is something you would do if you were a young couple with little ones who'd like the animals.

6.191 Despite the association of farm holidays as being for young families, most older people in the groups would still consider a farm stay now. They were especially interested in taking part in some aspects of farm life, though on an *if you want to* basis.

The farmer would say 'give us a hand', and we'd all muck in...

Nobody minds what you get involved in.

The hands-on aspect is really quite attractive.

I would want a go at the tractor driving and mucking out.

6.192 Aside from being attracted by a taste of farm work, many older people liked the idea that staying on a farm might better give insight into country life and/or farming tradition.

You are getting closer to the main occupation of people in the West Country.

The concept originally, was that you were seeing how life was then...

We are in amongst it and seeing how they live.

Shows you a different way of life and a slower, laid back tempo.

- 6.193 However, on consideration, everyone agreed that *more* and *more we see a different situation, with agriculture...a struggle to make ends meet.*
- 6.194 When asked what might make a farm holiday better than other types, warmth of welcome was a major consideration. Most felt that farming families knew how to extend a genuine, warm welcome and ensure that this stayed throughout the duration.

Better than at any guesthouse...they are really pleased to see you.

6.195 It was unclear whether a good farm holiday means integrating with the host's family, or whether there was preference for accommodation separate from the main farmhouse so that privacy could be preserved. Similarly, was farm accommodation preferably synonymous with just their own family staying, or several families at once?

It depends how many others are there.

Town people want to integrate.

There could be lots of families on the farm at once.

I think of it as just my own family.

6.196 What was agreed, however, was that older guests and families do not mix.

You need to go for older people, and say that there is plenty to do for older people...because we see it mostly as a thing you do with children.

If they were going for families in a big way, then that might become a little unattractive.

6.197 It was clear that for this age group, a major draw to the farm holiday would be peace and quiet.

You can do without lots of hyperactive kids.

Ideally, 3-4 like minded, older couples would be okay!

6.198 As with B&B, most did not think that a farm based holiday had to imply a basic standard of accommodation ('there is a wide variety of farms to choose from, I'm sure'), though most would be happy with a fairly basic level of comfort.

You can take your pick...some even have a pool. I would like that! (Others agreed but saw it as a 'nice to have', not an essential).

It is a bonus if you have a pool.

Depends where diversifying ranks in their priorities. Some have gone for it in a big way, to others it is just offering a small room as a base.

It does not need to be classy, just nice, basic.

A farm is...quite natural, unspoiled by modern additions.

Younger and Older – Shared Views of Farm Holidays

- 6.199 Both groups felt that the farm holiday would provide a more 'genuine' countryside experience, than other forms of accommodation.
- 6.200 All respondents (both age groups) preferred a farm to **hold livestock** and indeed if booking a farm holiday *you would* automatically *expect there to be animals*. Parents thought this was a good way for children to learn about animals and about the farming way of life, and older respondents simply saw a farm with livestock as being of greater interest and offering more to see.
- 6.201 Both felt that the presence of animals on the farm, was probably essential to booking and really getting enjoyment from a farm stay. However, older respondents agreed with younger that it was children in particular who would benefit.

It is nice, even now, to see lambing and milking, and those things. (Older)

The different lifestyle is all part of the experience. (Older)

Hearing the farmer get up at 4am to start feeding the cows…is part of the enjoyment.

- 6.202 Neither age group showed any true awareness or concern about environmental or ethical issues affecting a farm stay.
- 6.203 There was no real interest in whether a farm was organic or not;

You would not know that before you went.

There would be nothing to see that was different, if it was organic. So it wouldn't matter.

You wouldn't be able to tell even when you're there?

6.204 Nobody seemed to have considered, despite having stayed on farms, whether the use of pesticides on a farm was acceptable to them as visitors; on deeper consideration, however, they agreed:

I suppose you wouldn't want them spraying the crops while you were there, (though they did not mind if this happened either side of their visit!)

If your child was asthmatic you might look for pesticide-free...but otherwise you wouldn't even think to ask.

6.205 There were no spontaneously mentioned concerns about animal handling or ethics, though again when pressed, many felt they would not like to visit a battery farm or a farm indulging in otherwise cruel or unethical practices.

I would prefer a farm that didn't house battery hens. Where pigs were in the open fields.

- 6.206 However, it is fair to say that people seemed rather oblivious to this issue and would say *I have never* thought about it. One added if it was organic, it would be more expensive to stay there!
- 6.207 Most older respondents considered a farm holiday would, on the whole, cost them less than staying at a hotel or quality B&B. However, this was not a pre-requisite as it was recognised that many farms will in fact offer superior accommodation. Again there was reference to choice and diversity.

There are so many different types of farms to choose from.

You can find one that suits your own pocket.

6.208 Younger respondents, conversely, thought a farm would be at least on a par with good B&B or medium quality hotels. They saw no reason why it might cost less.

In the low season, for an average quality farm...self catering...£300 for a family per week. In the peak season £500 or more.

- 6.209 An absolute requirement of staying on a farm, is that (if the accommodation is not self catering), the standard of food has to be high and consistently so. This is an intrinsic part of the farm experience and crucial to its enjoyment.
- 6.210 All expected and hoped that the meals served on a farm, especially in the West Country, would be home made and fresh, taking advantage of good local produce. Fresh fish would be expected on the menu. Plentiful portions were also expected.

Homemade is one of the reasons to go farmhouse.

Home baked pastry and bread.

You would have the most wonderful breakfast.

They'll pile your plate high...that's one of the treats.

Plenty of veggies, and one good thing...no chips!

You wouldn't expect 'Tesco's Finest'.

You would not want burger and chips and to see the packet from Tesco.

6.211 There were expectations of a 'traditional' farm where the farmer worked outside and the farmer's wife entertained guests and undertook meal preparation. Several felt the approach would be *professional* and geared up for good catering. The farmhouse kitchen, for those staying within the farmhouse and eating there, was also important.

A really big kitchen with an Aga.

6.212 On the whole, a menu to choose from was not expected but one or two younger respondents would like this in an ideal world, if only to save embarrassment:

Because kids are fussy and you wouldn't want them to leave it.

- 6.213 Most preferred a rustic, traditional farmhouse with appropriate interior décor. They would be disappointed by modern and minimal, preferring *old beams and low ceilings, cosy, homely.*
- 6.214 All would expect the farmhouse or farm accommodation to have 'all mod cons', however, at least in communal areas. There was complaint that farmhouses...are always freezing cold! They have inadequate heating in the bedrooms, or a back boiler that does the whole house and switches off at 9pm when they go to bed!

Your room should have heating you can control as well as a nice open fire.

- 6.215 Bedrooms would be of similar standard to a good B&B, with basic provisions such as a well made and maintained bed (with a new mattress), high standards of cleanliness and hygiene, a TV, (though some prefer without or 'if you're living with the farmer's family, you watch TV with them') and coffee making facilities. There would be no expectation of luxurious touches.
- 6.216 Again, an en-suite bathroom is desirable but not essential (within farm self catering accommodation) if cleanliness is maintained. However, if bedrooms are integral within the actual farmhouse or in proximity to other guests, the en-suite becomes necessary to prevent disturbing others by use of the bathroom at night.

Local Produce

6.217 All felt that experiencing local produce in the South west was one reason to choose this destination. It was important that this was reflected on eatery menus and in tourist-frequented shops. It would also be expected on the menu in all types of serviced accommodation.

You would be wanting some freshly caught fish and some local recipes that wouldn't be found anywhere else.

Something on the menu must catch your attention as being local.

You would be wanting to get some proper food!

6.218 Bringing home local produce was considered an intrinsic part of a South West holiday.

Cheese, honey and clotted cream...

How Do Activities Differ by SW County?

- 6.219 Most found this question very difficult to answer, beyond saying that *you can do most things, in any county...of the South West.*
- 6.220 However there was some agreement that Devon and Cornwall are for a quieter, relaxing holiday.
- 6.221 Dorset is more for the countryside but also larger towns like Poole or Weymouth...maybe if different people in the family want to do very different things, you can please them all.
- 6.222 Gloucestershire and Somerset for activity holidays, ballooning, skydiving.
- 6.223 All counties had something to offer for a farm based holiday.

Seasonality

6.224 Clearly, younger respondents sought to take their annual holidays during school closures, though a short break of up to three days could be taken anytime, most felt.

There is a general perception that holidays begin at Easter and end in September.

The main season is Autumn through September and October, latest.

You can take the kids out of school for one day but not really longer.

6.225 It was also nice to take advantage of educational opportunities for the children, such as *going in Spring* so they can see the lambs or lambing.

- 6.226 Advantages of going to the South West off season were clear to young respondents, with *quieter resorts* and *winter atmosphere, and log fires* being especially attractive. However, most appealing was the prospect of a lower price.
- 6.227 Most agreed, though, that the South West is not a good winter destination, with many attractions either closing early or not opening at all.

Even in October, you find everything closes earlier.

It is really disappointing that nothing is open.

- 6.228 A few could envisage a winter or late autumn short break in the South West, only *if we were sure there were facilities for children, if the weather was wet.*
- 6.229 A few felt this meant staying in places that are geared up specifically for kids, like Center Parcs. Others maintained that there is no point going to the South West...to stay in a complex that could be anywhere.

I suppose you could just use the complex in the evening...or go out on trips into the countryside.

6.230 **Older respondents** liked to go to the South West both in and out of season, being largely unrestricted and less time-pressured, but most preferred to avoid school holidays and choose a quieter period.

You definitely don't want to do July and August.

There are lovely long days in June.

In Spring it's nice and fresh and there aren't many people.

6.231 However, some noted that out of season meant missing some of the better events:

A lot of the county shows are going to be in summer. And beer festivals and so on.

But the National Trust houses and other places like that might be open.

6.232 For some, the summer posed practical problems:

I need to go when it's cool and not the height of summer as I have nobody to water the pots at home.

- 6.233 There were not really any radically new ideas to draw visitors off season, but some felt TV and press advertising *is only seen May onwards*, *all geared to peak season*.
- 6.234 A few (older) would be enticed by special interest packages such as murder mystery weekends, or 'turkey and tinsel'. Christmas markets and Gluehwein would be appealing, as is a good meal *next to a*

Devon or Dorset log fire. This age group agreed an all-in package, that took away the need to drive and entertain themselves, would be a safe and appealing option.

To have everything laid on...for a short break...would not matter if the weather was bad.

It could have painting, pottery, organised walks...

- 6.235 However, due to driving concerns, this would really need to be offered by tour or coach operators/group travel organisers.
- 6.236 Younger respondents were fairly tied into school holidays so could not offer a useful solution to peak season holidays.
- 6.237 Others felt they were deterred from off peak travel by the weather:

The weather is a major attraction...you might do a short break in the rain but not a longer one.

It is difficult to drive the narrower roads and country roads in less than optimum weather conditions. I would not go to Cornwall in the snow or winds.

Activity/Special Interest Holidays

- 6.238 While both age groups wished to undertake some form of activity or interest while away, only the older group wanted to take part in dedicated 'special interest holidays' involving a group.
- 6.239 Younger respondents were more inclined to build their holidays around the needs and interests of the children, including sports such as walking, pony trekking and cycling but *on a day by day basis*.

Mostly you'd go to the South West for the beach, sightseeing and shopping, not for group things that are organised.

- 6.240 However, one or two would consider a South West based cookery holiday without the children, and one male suggested a golfing break.
- 6.241 Older respondents suggested a wealth of interesting activities they might like to undertake themselves (i.e. outside of a group/special holiday), in order of priority:
 - ?? Walking & swimming (equal)
 - ?? Cycling
 - ?? Fishing
 - ?? Dancing
 - ?? Putting

- ?? Golf
- ?? Skittles
- 6.242 Activities suggested as a group, (either to further an existing interest or learn something new) were: South West cookery (popular with most with participants learning to prepare dishes of the particular region), touring historical sites/NT (several), garden tours (several), painting holidays (several), microlighting, ballooning (one), golfing (one) and modelling (one).

Sourcing and Booking

- 6.243 Both age groups find it straight-forward to source and book a countryside holiday in the South West, especially as Summer season approaches. Older people, though, recognised *you have to make a bit of an effort to find it…it will not fall in your lap.*
- 6.244 There were correlations in how holidays would be sourced and booked, between the two age groups.
- 6.245 Unsurprisingly, both age groups rely largely on information gathered from Tourist Information Centres but supported equally with response to national press and print destination ads. At least six in each group saw these as the primary means of sourcing south West holidays and breaks.

The Lady magazine is a good source of ads for farmhouses and cottages. (Older)

You see lots of advertising in the broadsheets. The Sunday papers especially are good, for supplements.

It is amazing how much information is sent in response to a call to the Tourist Information Centre.

They (TIC) send you everything from accommodation, maps, things to see and do.

You can either ring them (TIC) in your area, or the area you are travelling b...both are just as helpful.

6.246 The internet was the second ranking means of sourcing holidays in the UK by both age groups. However, only accessible to five out of the ten **older** respondents, only one or two older people would consider using it to make a booking. All (older and younger) would first prefer to receive printed material and talk to proprietors, and make a postal booking.

You can tell a lot by speaking to someone.

They need to sound welcoming.

6.247 Other older respondents had no knowledge of internet usage and were wary of this, or plain disinterested.

6.248 Younger respondents mostly had internet access but only 6 out of 9 respondents would possibly use it for sourcing a holiday **at present**. However, despite this, those not on the internet or not that knowledgeable, felt sidelined. It was evident that for this age group, the internet was seen as *up and coming, the way to go...in the near future.*

If you go to a travel agent, that is a third party inconvenience.

You can see photos better online.

Farms and countryside accommodation will have to be on the net, there's no two ways about it.

- 6.249 For both age groups, the internet was currently more likely to be used for sourcing overseas holidays as these are less easy to obtain information on and many UK accommodation sites were considered poor and took too long to download.
- 6.250 Secondary methods of sourcing for older people, were publications by National Trust and (for one) the Royal Horticultural Society, as well as publications available in the high street.
- 6.251 Television advertising was important to both age groups but:

It is only advertising the major resorts...not the countryside as such.

It is all geared to peak season.

- 6.252 One or two thought regional radio advertising was effective.
- 6.253 Suggested new ways of promoting countryside accommodation, involved the internet for younger people, but collaborative advertising and PR for older people.

They need to get onto the internet recommendation sites. (Younger).

Sites that give a percentage score for the accommodation's performance on key things, like comfort, cleanliness, food etc, across a broad spectrum of people. (Younger).

There are an awful lot of farms and guesthouses all advertising separately. Maybe if they got more co-ordinated and bought more space. (Older).

Summary

Thoughts on SW Countryside

- 6.254 Most had already taken a South West holiday in the last 5 years, and still featured the South West in their annual plans. By 'South West', though, most thought primarily of Devon, Cornwall and Dorset rather than the other counties discussed.
- 6.255 Major draw to Devon, Cornwall and Dorset was the mix of countryside and tranquillity, and coast. Without the coast, many could not easily see any county as offering true holiday potential.
- 6.256 Only one or two really enjoyed the countryside enough to want to be really out in the sticks and not desire to travel to the coast or town.
- 6.257 Younger respondents would use the countryside as a base and not necessarily spend too much time in rural surroundings.
- 6.258 The South Western countryside equates to only positive associations:
 - ?? Tranquillity/peace and quiet, getting away from it all.
 - ?? Relaxation/de-stressing.
 - ?? Slower pace of life.
 - ?? Scenery.
 - ?? Walks and countryside/coastal paths.
 - ?? Community feel and welcome.
 - ?? Good food.
- 6.259 The South West had an immediate advantage in the weather and climate probably being more reliable than at other UK locations.

Comparing the SW to Other Possible Destinations

6.260 A holiday in France or Italy was overall less appealing than a South West holiday for most, since the ease of *jumping in the car and being there in a couple of hours would override other things*.

Holiday Requirements

- 6.261 Comfortable accommodation was by far the most important factor.
- 6.262 Also critical were:

Younger group: swimming, child friendly eating out, farms, child oriented activities (cycle hire, parks, theme parks), castles/historical sites, towns and shopping, and local markets.

Older group: gardens, leisurely walks, craft centres, stately homes, NT and EH, historic towns and shopping (smaller, independent shops with local craft, galleries etc), good local produce and 'homemade' foods, quality eateries, markets.

Accommodation_Requirements

- 6.263 Younger respondents preferred self catering accommodation, usually a chalet or cottage, or less frequently, a caravan. One or two had stayed in hotels and B&B, but this was the exception rather than 'the norm'. They preferred the freedom to do as they pleased, and less pressure on children to be well behaved and careful.
- 6.264 The older group were more likely to choose B&B.
- 6.265 It was not automatically assumed that 'countryside accommodation' would be basic, though a basic level of accommodation was acceptable as long as it was clean, hygienic and welcoming. All agreed that in the countryside just as in the town, a wide variety of accommodation was available to suit all tastes and pockets.

Farm Accommodation

- 6.266 Farm accommodation was not spontaneously thought of, but emerged as highly appealing to both groups. Best aspects of staying on a farm would be the warmth of welcome, standard of home cooking, sights, sounds and smells, and the farm environment as a learning experience. These were considered to give the farm holiday the edge over other countryside accommodation. However, the other key factors, 'slow pace of life' and 'tranquillity' could probably be gained equally in other rural accommodation.
- 6.267 Older people liked the idea that staying on a farm might better give insight into country life and/or farming tradition.
- 6.268 Most did not think that a farm based holiday had to imply a basic standard of accommodation ('there is a wide variety of farms to choose from, I'm sure'), though most would be happy with a fairly basic level of comfort.
- 6.269 All respondents (both age groups) preferred a farm to **hold livestock** and indeed if booking a farm holiday *you would automatically expect there to be animals*.
- 6.270 There were no spontaneously mentioned concerns about environmental issues, animal handling or ethics. When pressed, many felt they would not like to visit a battery farm or a farm indulging in otherwise cruel or unethical practices but there was still no real concern about environmental issues.

- 6.271 Most older respondents considered a farm holiday would, on the whole, cost them less than staying at a hotel or quality B&B. However, this was not a pre-requisite as it was recognised that many farms will in fact offer superior accommodation. There was reference to choice and diversity.
- 6.272 All expected and hoped that the meals served on a farm, especially in the West Country, would be home made and fresh, taking advantage of good local produce. Fresh fish would be expected on the menu. Plentiful portions were also expected.
- 6.273 Most preferred a rustic, traditional farmhouse with appropriate interior décor. They would be disappointed by modern and minimal, preferring *old beams and low ceilings, cosy, homely.*

Seasonality

- 6.274 Younger respondents sought to take their annual holidays during school closures, though a short break of up to three days could be taken anytime.
- 6.275 It was also nice to take advantage of educational opportunities for the children, such as going in Spring so they can see the lambs or lambing.
- 6.276 Advantages of going to the South West off season were clear to young respondents, with quieter resorts and winter atmosphere, and log fires being especially attractive. However, most appealing was the prospect of a lower price.
- 6.277 A few could envisage a winter or late autumn short break in the South West, only if we were sure there were facilities for children, if the weather was wet.
- 6.278 Older respondents liked to go to the South West both in and out of season, being largely unrestricted and less time-pressured, but most preferred to avoid school holidays and choose a guieter period.
- 6.279 There were no radically new ideas to draw visitors off season, but some felt TV and press advertising is only seen May onwards, all geared to peak season and that this worked against off season booking.
- 6.280 A few (older) would be enticed by special interest packages such as murder mystery weekends, or 'turkey and tinsel'.

Special Interest Holidays

6.281 While both age groups wished to undertake some form of activity or interest while away, only the older group wanted to take part in dedicated 'special interest holidays' involving a group.

Sourcing and Booking

6.282 Both age groups find it straight-forward to source and book a countryside holiday in the South West. Both groups rely largely on information gathered from Tourist Information Centres supported by their responses to national press and print destination ads.

- 6.283 The internet was the second ranking means of sourcing holidays in the UK by both age groups. However, only accessible to five out of the ten **older** respondents, only one or two older people would consider using it to make a booking. All would first prefer to receive printed material and talk to proprietors, and make a postal booking.
- 6.284 It was evident that for the younger age group, the internet was seen as *up and coming, the* way *to go...in the near future.*
- 6.285 Suggested new ways of promoting countryside accommodation involved the internet (for younger people), but greater collaborative advertising and PR (for older people).

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