



North West Farm Tourism Initiative
Evaluation
Baseline Study
March 2004



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Questions Answered Ltd.
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1. Introduction

Questions Answered Ltd. (QA) is pleased to submit this document which reports on the baseline survey of farm-related tourism businesses in the North West conducted in January 2004.

1.1 Context

Farm Tourism is now a significant part of the rural business sector in the North West region. Most of the farms which have diversified into tourism in recent years provide self-catering accommodation in redundant farm buildings – while others offer bed and breakfast facilities. A small number of farms also provide visitor attractions – such as rare breeds, children's play areas, and craft centres.

The North West Farm Tourism Initiative (NWFTI) provides a free business counselling service for any working farm (defined as having a holding number and providing more than 1,000 hours per annum of farming activity) located in the North West. The object is to support viable farms (identified through a Forum Business Advice Service (FBAS) or similar report) by offering advice on any aspect of either developing or improving their farm tourism enterprise. Benefits can include:

Experienced and qualified business counsellors to review areas of importance to increase business effectiveness or advise on development of new business opportunities.

- Advice on the development of a business plan and using this as a tool to increasing profitability as well as raising finance from a bank.
- Help to develop a marketing plan
- Obtaining information on potential sources of financial assistance to farm tourism enterprises. Capital grants on small projects and marketing grants for groups of farm tourism operators are available through the project.¹

The initiative has been developed to stimulate innovative farm diversification projects, drive up excellence and strengthen existing farm businesses. Priority is given to key themes such as: Food & drink, Activity tourism (walking, cycling, riding, fishing), Packages (linking farm accommodation to rural activities), Eco tourism, Heritage & culture, Niche markets, Improved ICT, Marketing and leisure skills and building successful marketing partnerships.

¹ Website information

2. Overall project objectives

The objective of the overall research and monitoring programme was to monitor the outputs 1-9 over the course of the project until March 2007. Research would be conducted with farm businesses throughout the North West² in order to assess the following outputs:

- The volume and geographic location of farms in the North West
- The number and location of farm tourism enterprises within this population
- The number of farms with potential / interest in diversifying into tourism enterprises
- Types of farm tourism enterprise
- Standards of farm tourism facilities
- Volume & value of farm tourism (to include occupancy rates of farm accommodation businesses, and contribution of tourism activity to overall revenue)
- Use of marketing and ICT skills
- Awareness and use of local produce and crafts

2.1 Rationale

QA recommended that the research and monitoring process should consist of the following stages from October 2003 to September 2004

1. An auditing exercise to plot the population of farms in the North West and of farm-tourism enterprises within this population. The output would be a master database of farm-tourism businesses for the NWFTI
2. A baseline study of a representative sample of 600 farms in order to establish baseline figures for the respective outputs of the NWFTI and to develop a panel for continued further research.
3. Case study examples of farm-tourism businesses (12) tracked and monitored throughout the year to complement the quantitative results with qualitative information and to show best practice.
4. Quarterly research monitor with an additional 100 farms per quarter to provide regular feedback on success of NWFTI's measures and to top-up the panel of farm businesses.
5. End of year evaluation with original sample of 600 farms to establish the success of the NWFTI in terms of set outputs

2.2 Baseline study objectives

This document serves to report on objective 2 of the above objectives – the baseline study of farms and farm-tourism businesses.

² Cumbria, Cheshire, Greater Manchester, Lancashire, Merseyside and High Peak District of Derbyshire

3. Baseline Study Method

3.1 Interviews with key stakeholders

At the initial client meeting key stakeholders were identified who would be suitable for interview. Others were also identified during the research. They included:

Table 1. Stakeholders in North West Farm Tourism

Interviewed	Contact			Organisation
Yes	Ms	Laura	Wilson	FarmstayUK
Yes	Mrs	Carole	Mitson	FarmstayUK
Yes	Mr	Nigel	Embry	FarmstayUK
Yes	Ms	Sarah	Wilson	DEFRA rural development service
Yes	Ms	Beryl	Smith	Business Link North & West Lancashire
Yes	Ms	Nancy	Tweddel	Cumbria Farm Link
Yes	Ms	Linda	Steadhouse	Horse Holidays Cumbria
Yes	Mr	Matthew	Robinson	Holmescales Farm
Yes	Ms	Tamsin	Beevor	Hadrian's Wall Tourism Partnership
Yes	Mr	John	Metcalfe	National Trust
Tba	Mr	Tim	Lyman	DEFRA
Tba	Mr	Mac	Campbell	FarmstayUK
Tba	Ms	Megan	Williamson	Dunham Enterprise Group
Tba	Mr	John	Redgate	DEFRA rural development service
Tba	Ms	Sarah	Chaplin-Bryce	Low Bridge End Farm
Tba	Mr	Paul	Harper	ADAS Rural Futures
Tba	Ms	Jane	Simpson	DEFRA
Tba	Ms	Pam	McCall	Rural Payments Agency

Qualitative telephone interviews were conducted with ten of the identified contacts to inform the telephone research in terms of the line of questioning, identify any existing research or relevant information specific to farming and farm-based tourism in the North West and to collect all available farm-based businesses databases.

3.2 Database collation & cleansing

The main databases of contacts for the baseline survey were those provided by CTB, NWTB and CREA. These included a high proportion of farms that were already involved in diversification into tourism and were known by the NWFTI.

Other sources included TICs in the North West, the majority of who were contacted in order that they may provide details of local farm-related tourism businesses and FarmstayUK which provided brochure details of their regional members.

It was decided that the databases provided by the clients and other sources should undergo a de-duplication and cleansing exercise to ensure the contacts were up to date and accurate. Cleansing involved a short telephone interview to confirm contact details and to ascertain the stage at which farms were in their tourism diversification; whether they were already involved, were planning involvement or had no plans.

3.3 Sampling

Once the de-duplication and cleansing exercise had taken place, it was clear that the number of contacts held would be insufficient to complete the requisite number of completions for the baseline study.

It was also felt that the database we held was too heavily weighted towards farms that were already involved in diversification into tourism, were known by the NWFTI and were located in Cumbria.

Therefore it was decided to purchase further contacts of farms in the North West from commercial providers to boost the number of contacts. Again a de-duplication exercise was conducted to ensure that contacts were not called twice.

By their very nature these new contacts were less likely to include farm-related tourism businesses than the contacts on the databases provided by CTB, NWTB and CREA.

The baseline study already having been set in motion with the original contacts from the CTB and CREA databases, it was decided that an additional 200³ interviews with farms in the North West from external database be made in order to reduce the level of bias in the sample (originally there was a high proportion of existing farm tourism businesses and businesses based in Cumbria rather than in the other sub-regions of the North West.)

From the 800 interviews undertaken, a random sample of 600 that was more representative of the distribution of farms in the North West was taken to make up the baseline survey.

The table below shows the distribution of farms throughout the North West region and in addition the sample distribution of farms in the baseline survey.

Table 2. Distribution of farms in the North West and of baseline survey

North West Farm Distribution (DEFRA June 2002)			NWFTI Baseline Survey Interviews with farms (Jan/Feb 2004)		
Cumbria	6790	34%	Cumbria	204	34%
Cheshire	4661	23%	Cheshire	137	23%
Greater Manchester	1583	8%	Greater Manchester	56	9%
Lancashire	5831	29%	Lancashire	170	28%
Merseyside	478	2%	Merseyside	14	2%
High Peak	613	3%	High Peak	19	3%
Totals	19,956	100%	Totals	600	100%

³ these 200 surveys will be included later in the study

3.4 Telephone research

A questionnaire was designed in conjunction with the client and which included areas of questioning relevant to the objectives of the study.

A team of experienced telephone researchers was briefed and the telephone survey was undertaken in January and February 2004 at QA's offices in York. The timing of the research allowed participants to comment on the whole of 2003 as a 12-month season.

In total 800 telephone interviews were conducted for the baseline study. Of these a sample of representative sample of 600 was randomly selected.

These included interviews with farms who were actively involved in tourism, those who were planning future involvement and those who had no current plans to diversify into tourism.

4. Key stakeholders findings

The comments of a number of key stakeholders who were interviewed in order to gain their thoughts and opinions on farm tourism in the North West and on the evaluation of the NWFTI have been compiled under the following broad categories:

4.1 Planning regulations and grant applications

- Planning permission was seen as difficult to obtain and expensive.
- Grant application forms were seen as complicated
- Complexity of Rural Enterprise Scheme
- Catch 22 situation; quality facilities required to gain tourist board accreditation, in the meantime need to win business to pay for quality
- How to get to the people who need the grants but are too scared to ask

4.2 Business advice

- Farmers need help with research & marketing
- Encourage the sharing of best practice
- Training required for marketing, balance sheets, guidelines, promotion
- Advice needed on risk assessment
- Advice on marketing for all seasons

4.3 Tourist Board/Tourist Information

- Confusion between roles & responsibilities of different tourist boards.
- Tourist Information is patchy in Lancashire. Pendle needs promoting.
- Need to pull marketing for whole region together
- South West and North Cumbria need pushing more – always The Lakes get the marketing grant

4.4 Supply & demand

- Feeling that there are too many B&B's and self-catering accommodation - need more diversification into holiday attractions.
- Demand from public for top class accommodation
- Not all farms are suitable for tourism
- Not all farms are in areas suitable for tourism
- Farms should look at competition before they diversify – it's a competitive market place
- Feeling that everybody wants to do the same thing – B&B

4.5 General

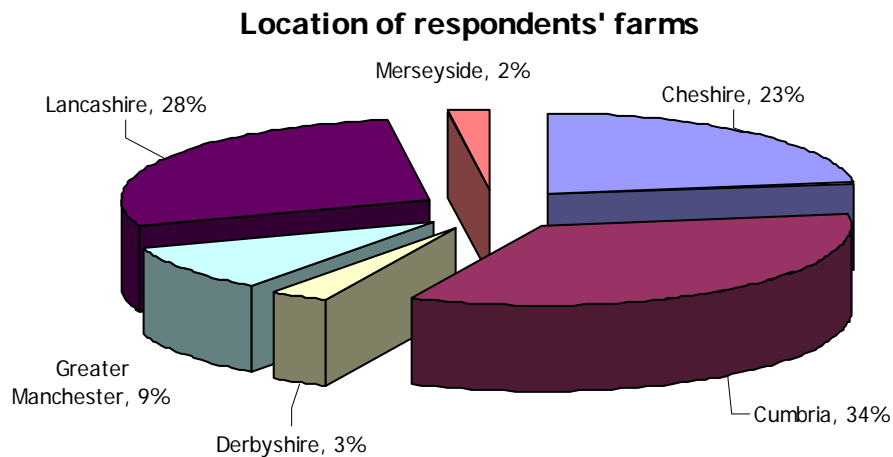
- Farmers want to be farmers, not tourism managers
- Still possible to get a good living out of farming
- Farmers should consider long-term effect of diversification

4.6 NWFTI

- Well thought of
- Uncomplicated
- Good personnel
- Potential problem with confidentiality
- Awareness is a big issue
- Too much of a grants culture in farming – need more business planning

5. Baseline study findings

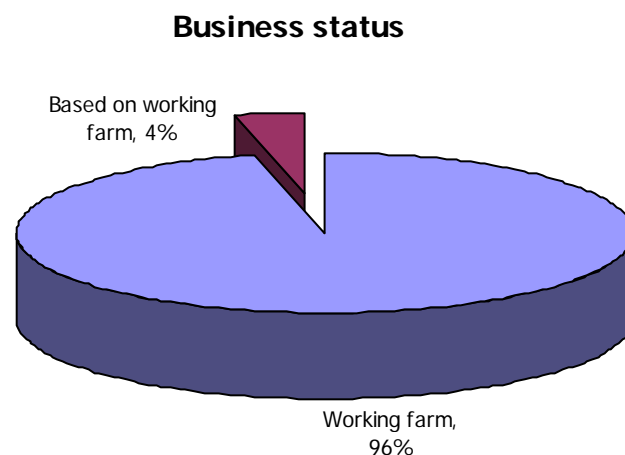
5.1 Location of respondents' farms



The location of respondents reflects the distribution of farms in the North West with 34% located in Cumbria, 28% in Lancashire, 23% in Cheshire, 9% in Greater Manchester, 3% in Derbyshire and 2% in Merseyside.

5.2 Business status

Respondents were asked whether their business was a working farm (defined as a minimum of 51% income from farming activity) or whether their business was based on a working farm. If the business was not farm-related the interview was ended.



Whilst 96% of respondents operated a working farm, a further four percent were based on a working farm.

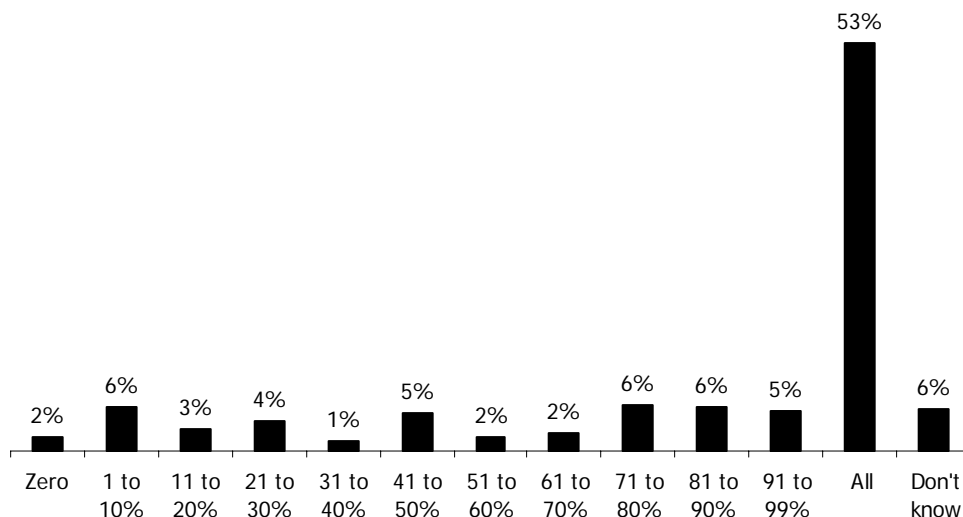
Of the 22 businesses that were based on a working farm, nine were in Cumbria, eight were in Lancashire and three were in greater Manchester. One was located in each of Cheshire and Derbyshire. Fifteen of these businesses were accommodation providers and five were non-accommodation tourism businesses.

In order to interview as many farm tourism businesses as possible, we made the survey as inclusive as possible. This has resulted in some businesses outside the definition of 51% income from farming being included.

5.3 Proportion of income from farming activity

Respondents were asked the proportion of their overall income that came from farming activity.

Proportion of income from farming activity



Whilst just over half (53%) of respondents said that all their income came from farming activity, the remaining respondents' income was supplemented by activity other than farming.

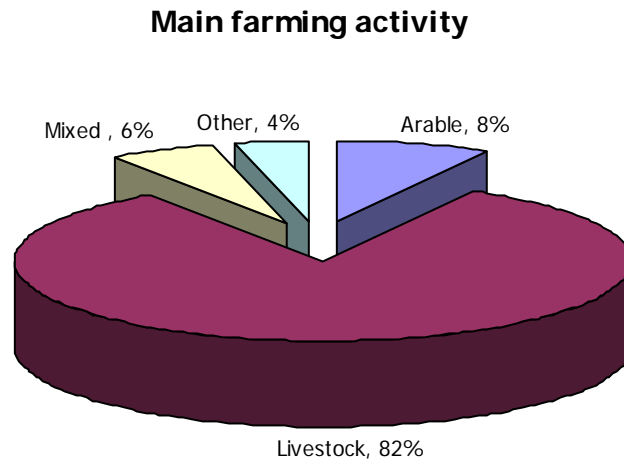
Three quarters of respondents (74%) gained 51% or more of their income from farming activity whilst a fifth (21%) gained 50% or less of their annual income from farming activity.

The mean proportion of income generated from farming activity was 80%.

For farm-tourism business, the average proportion of income generated from farming activity was lower with a mean 55% for accommodation providers and 48% for non-accommodation providers.

5.4 Main farming activity

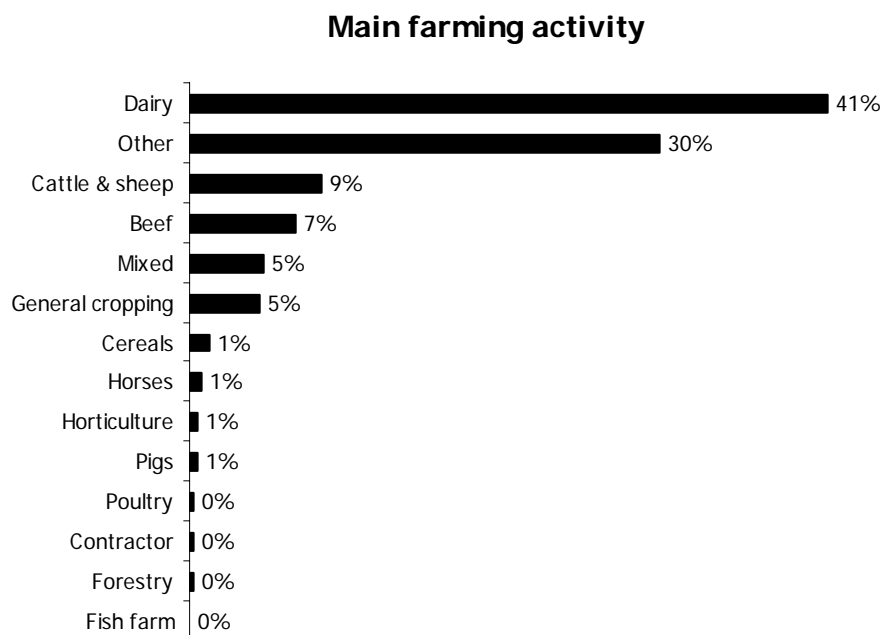
Those respondents still actively involved in farming were asked their main farming activity. Responses were very broadly categorised.



The majority of respondents' (82%) main farming activity was livestock-based with Beef, Dairy and Sheep prevalent. There was a minority of Mixed and Arable farms and other included the leasing of land, contracting, horses, pets and diversification into tourism.

Farmers' main activity was many and various and different permutations of several core livestock types. For the simplicity of this exercise they have been categorised Livestock, Mixed, Arable and Other.

5.4.1 Main Farming Activity (continued)



In terms of broad categories, dairy was the main business activity of 41% of farms, cattle and sheep accounted for 9%, beef for 7% and both mixed and general cropping each accounted for 5% of farms' main farming activity.

Other farming activities (30%) included a range or selection of the other given categories.

Further analysis shows that Dairy farming was predominant amongst respondents from Derbyshire (14 out of 19 respondents), Cheshire (59%) and Lancashire (50%).

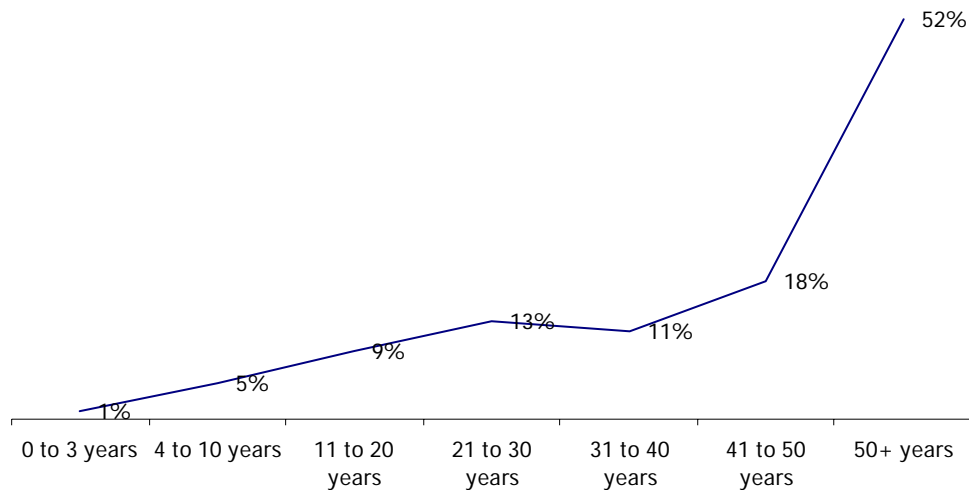
In Cumbria, 45% of respondents said their main farming activity was an Other type. (We had based our criteria on the DEFRA database which did not offer "Sheep" as a category either in isolation or as the lead farming activity. There were a significant number of respondents who mentioned sheep in the survey and it can be assumed that many of the Other responses will include sheep farming).

Amongst accommodation providers, the main farming activities were Other (46%), Dairy (20%) and Cattle & sheep (13%). Amongst other tourism businesses, the main farming activities were Dairy (29%), Other (24%) and General cropping (16%).

5.5 Number of years spent operating the farm

Respondents were asked how many years they or their family had been operating the farm.

Number of years operating farm



Farm businesses were well established with over half of respondents (52%) operating the farm for over 50 years and well over three quarters of respondents (81%) operating their farm for more than 21 years.

Only 6% of respondents had been operating their farm for less than 10 years.

The mean number of years that respondents or their families had been operating their farm was 49 years.

5.6 Number of people employed on the farm.

Respondents were asked how many people including themselves and their family were employed on the farm. This included unwaged family members.

Table 3. Number of employees per farm

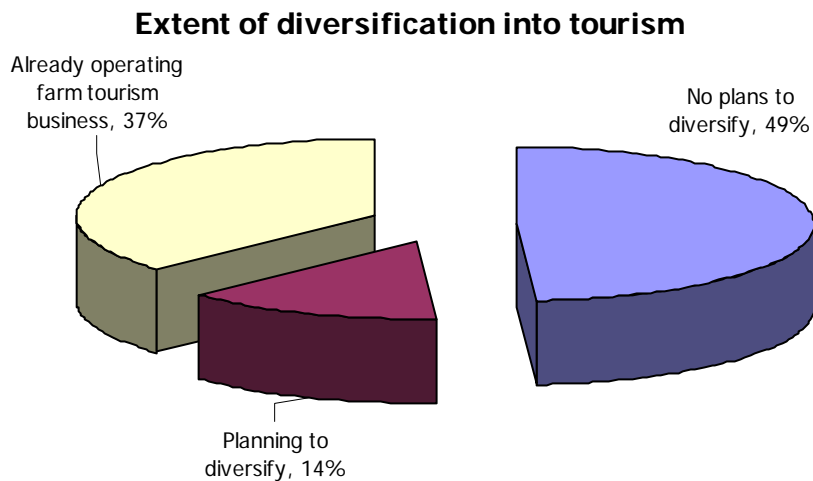
Total no. employees per farm	Permanent	Seasonal	Contractor
Full Time	1362	46	83
Part time	313	184	298

Average no. employees per farm	Permanent	Seasonal	Contractor
Full Time	2.3	0.1	0.1
Part time	0.5	0.3	0.5

The average number of employees per farm was between two and three full time employees and between one and two part time employees.

5.7 Extent to which farms had diversified into tourism

Respondents were asked the extent to which their farm had diversified into tourism.



Over a third of the respondents (37%) were already operating a farm tourism business. A further 14% of respondents said they were planning to diversify. Almost half of respondents (49%) said they had no plans to diversify.

Further analysis shows that over half (52%) of the respondents from Cumbria already operated a farm tourism business compared with 30% of Cheshire respondents and 31% of Lancashire respondents.

Half of the Merseyside respondents (seven out of fourteen) already operated a farm tourism business compared with a quarter of Derbyshire respondents (five out of nineteen) and less than a fifth (ten farms out of 56) of Greater Manchester respondents.

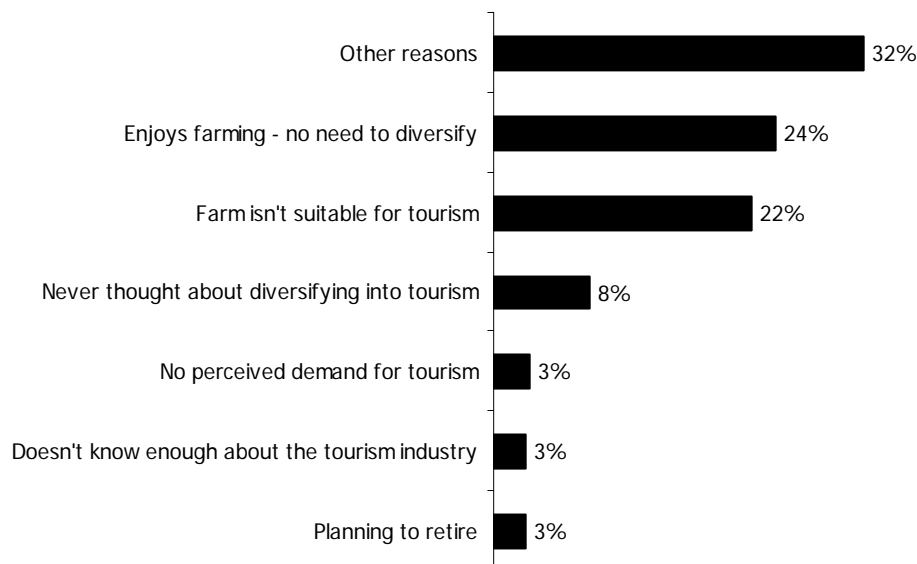
Of the 86 respondents who were planning to diversify, 39 were based in Cumbria, 23 were located in Lancashire and 20 were in Cheshire.

The majority (20 out of 22) of businesses that were based on a working farm already operated a farm tourism business and the remaining two were planning to diversify. There were four respondents in Derbyshire that had plans to diversify but none in either Greater Manchester or Merseyside.

5.8 Reasons against diversification

Those 292 respondents who had no plans to diversify into tourism were asked their reasons for not doing so.

Reasons against diversification (base 292)



The chief reasons given for not having any plans to diversify into tourism included the enjoyment of farming with no need to diversify (24%) and that their farm was not suitable for tourism (22%).

A further 8% of these respondents had never thought about diversifying into tourism, 3% felt there was no perceived demand for tourism in the area and 3% felt they didn't know enough about the tourism industry.

Only three percent gave retirement plans as a reason for not planning to diversify into tourism.

Further analysis shows that Lancashire respondents were more likely than average to say they enjoyed farming and had no need to diversify (33%). Cheshire farmers were more likely than average to say they had never thought about diversifying into tourism (15%).

Farmers from Greater Manchester (26%) and Merseyside (three out of seven farms) were more likely to say that their farm was not suitable for tourism.

Farmers from Cumbria were more likely to give another reason for having no plans to diversify (41%)

Amongst other reasons against diversification given, "too busy farming" was mentioned by ten farmers (5%) and diversification plans thwarted by planning and other regulations was also mentioned by another ten.

"National Trust won't let us-used to allow camping for special school but NT stopped that and wouldn't get past local planning board: they (NT & Planning say this is a sensitive area"

Restrictions on diversification through being a tenant, was mentioned by several respondents as were prohibitive costs.

"Already diversified (into B&B) but have since given that up. Reasons - hit by foot and mouth crisis, funding offered was not flexible enough so couldn't upgrade rooms. Am needed to work on farm, too busy, also has part time job"

"We were planning to diversify and convert 2 barns for B&B, but in the end decided we couldn't afford the outlay"

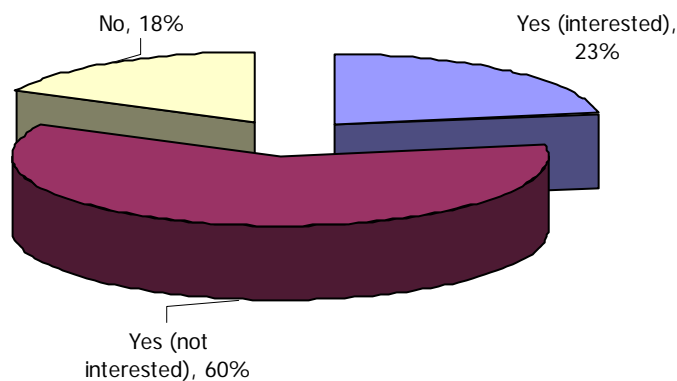
Saturation of the local tourism market was mentioned by several respondents as was the taking up of viable alternatives to diversification. Others felt they weren't in a tourist area, others had personal reasons and some just weren't interested.

"Farmers market has greater potential for turnover, looked into converting barns but energy going into farmers market first, also believe the tourism market is getting saturated"

5.9 Awareness of support and advice about diversification

Respondents who had no plans to diversify into tourism were asked if they were aware of support and advice available for farmers to diversify into tourism.

Awareness of NWFTI support & advice amongst farms with no plans to diversify (base 292)



The majority of respondents (60%) who had no plans to diversify said they were aware of but were not interested in receiving the support and advice available for farmers to diversify into tourism. A further 23% said they were both aware and were interested in the support and advice available.

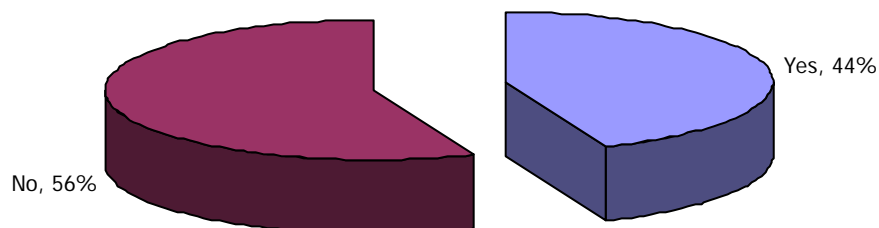
Under a fifth of these respondents (18%) were not aware of the support and advice about diversification.

Further analysis shows that of the 66 respondents who were aware and interested in the support and advice available, there was a proportionately higher interest shown by respondents from Lancashire (25 respondents or 27%) and from Greater Manchester (15 respondents or 33%).

5.10 Interest in receiving information about advice and support available from NWFTI

The same respondents were asked if they would like to receive information about the advice and support available from the NWFTI.

Farms with no plans to diversify - interest in NWFTI info (base 292)



A hundred and twenty-eight (44%) of the respondents with no plans to diversify said they were interested in receiving information about the support and advice available from the North West Farm Tourism Initiative.

There was a fairly even proportionate level of interest shown by farmers located in different sub-regions.

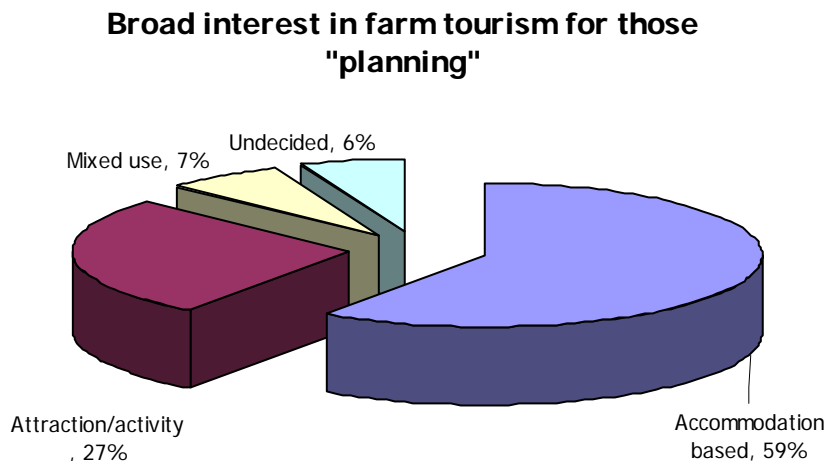
Table 4. Farms with no plans to diversify, interested in receiving NWFTI information

Sub region	Number of farms interested in receiving information
Cheshire	33
Cumbria	30
Derbyshire	4
Greater Manchester	23
Lancashire	35
Merseyside	3
Total	128

Their details have been captured on the master database.

5.11 Nature of interest in farm tourism

Farmers who were planning to diversify were asked the broad nature of their interest in farm tourism.



Of the 86 respondents who were planning to diversify into tourism, 59% had plans for accommodation-based tourism. This included both self catering and serviced accommodation and ranged from providing camping facilities to converting unused farm buildings.

"Planning to turn a redundant building into a holiday cottage"

Over a quarter of these respondents (27%) had plans for attraction or activity based tourism which included open farms, farm shops, livery, trails and crafts.

"Horse jumps, exercise runs through woods etc for horses and riders"

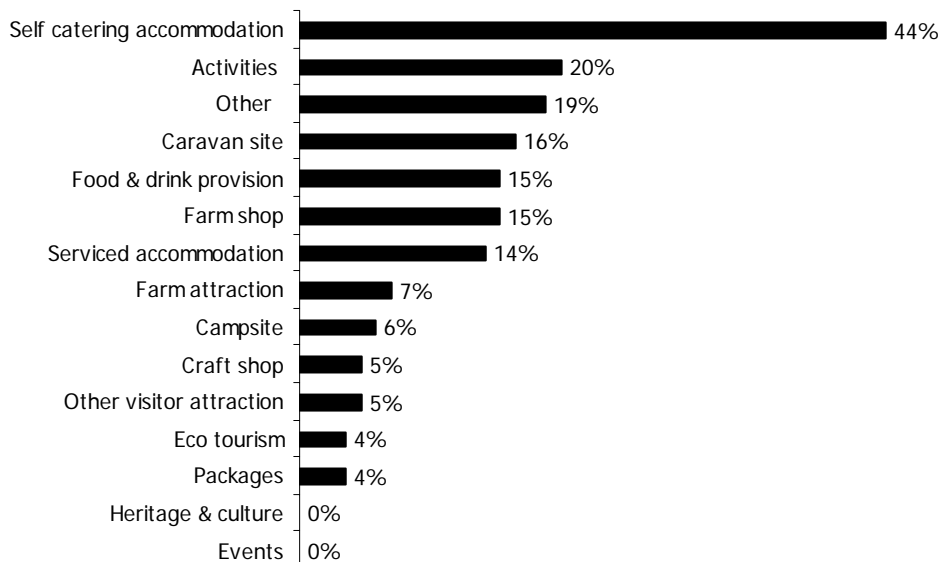
A minority had plans for both accommodation and attractions or activities and several had no specific plans.

"Opening self catering accommodation in converted barn and campsite. Hoping to turn farm into resource to demonstrate use of alternative energy (solar) to interested parties"

5.12 Intended tourism services

The 86 respondents who were planning to diversify were asked which services they intended to provide for tourists on their farm.

Services planned for tourists (base 86)



The provision of self-catering accommodation was the most popular method of diversification with 44% of these respondents. A further 14% were planning to offer serviced accommodation.

Twenty percent were planning to provide activities and 15% were planning to provide food and drink. Caravan sites were planned by 16%, farm shops were planned by 15% and farm attractions by 7%.

A minority were each planning craft shops, campsites, eco-tourism, packages, and other visitor attractions. Nobody was planning to run heritage & culture activities or events.

Other planned tourism services mentioned by individuals included a horse rehabilitation centre, moorings for canal boats and an in-filled quarry for water sports.

Table 5. Planned tourism business diversification broken down by sub-region

Planned Activities	Cheshire	Cumbria	Derbyshire	Gtr. Man	Lancashire	Merseyside	Total
Self catering accommodation	4	21	3	0	10	0	38
Activities	2	9	0	0	6	0	17
Other	7	6	0	0	3	0	16
Caravan site	2	5	1	0	6	0	14
Farm shop	2	8	0	0	3	0	13
Food & drink provision	2	9	0	0	2	0	13
Serviced accommodation	3	7	0	0	2	0	12
Farm attraction	0	6	0	0	0	0	6
Campsite	1	3	0	0	1	0	5
Other visitor attraction	0	3	0	0	1	0	4
Craft shop	0	4	0	0	0	0	4
Packages	0	2	0	0	1	0	3
Eco tourism	0	1	0	0	2	0	3
Events	0	0	0	0	0	0	0
Heritage & culture	0	0	0	0	0	0	0
Total	23	84	4	0	37	0	148

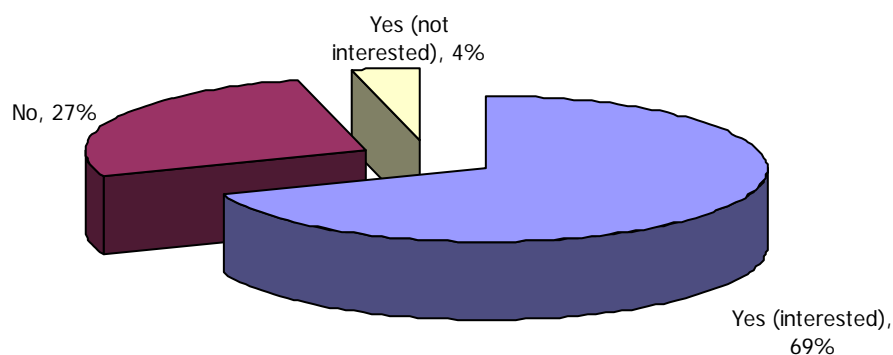
There was the greatest interest in diversifying into tourism from Cumbria, Lancashire and Cheshire respondents.

It can be seen that there are plans for 148 tourism business activities among the 86 respondents who expressed an interest in diversifying into tourism i.e. some respondents have plans to diversify into more than one tourism activity.

5.13 Awareness of NWFTI with farms planning to diversify

Farms planning to diversify were asked if they were aware of the support and advice available from the North West Farm Tourism Initiative.

Awareness of NWFTI support & advice amongst farms planning to diversify (base 86)



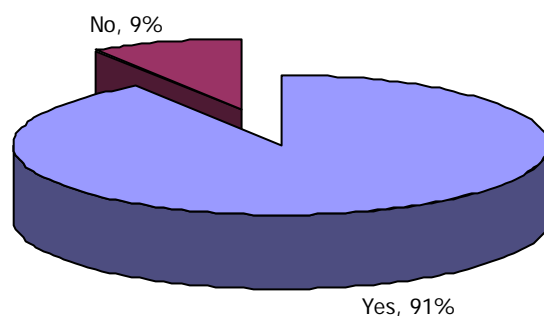
Over two thirds (69%) of these farms were aware and were interested in the support and advice available from the NWFTI.

Over a quarter (27%) said they were not aware of the support and advice available from the NWFTI.

5.13.1 Interest in receiving information from NWFTI

Farms that were planning to diversify were asked if they would like to receive information about the advice and support available from the NWFTI

Farms planning to diversify - interest in NWFTI info (base 86)



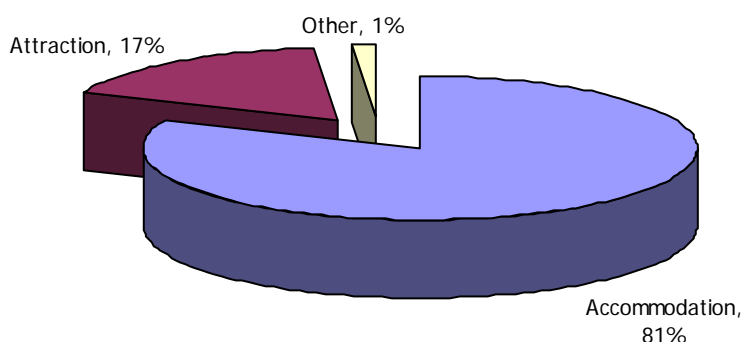
The majority of these respondents (91%) were interested in receiving information about the advice and support available from the NWFTI.

Thirty-six respondents in Cumbria, twenty-two in Lancashire, seventeen in Cheshire and three respondents in Derbyshire said they would like to receive information about the advice and support available from the NWFTI. Their details have been captured on the master database.

5.14 Nature of farm tourism business

The 220 active farm tourism businesses were asked the broad nature of their tourism business.

Current provision of tourism services



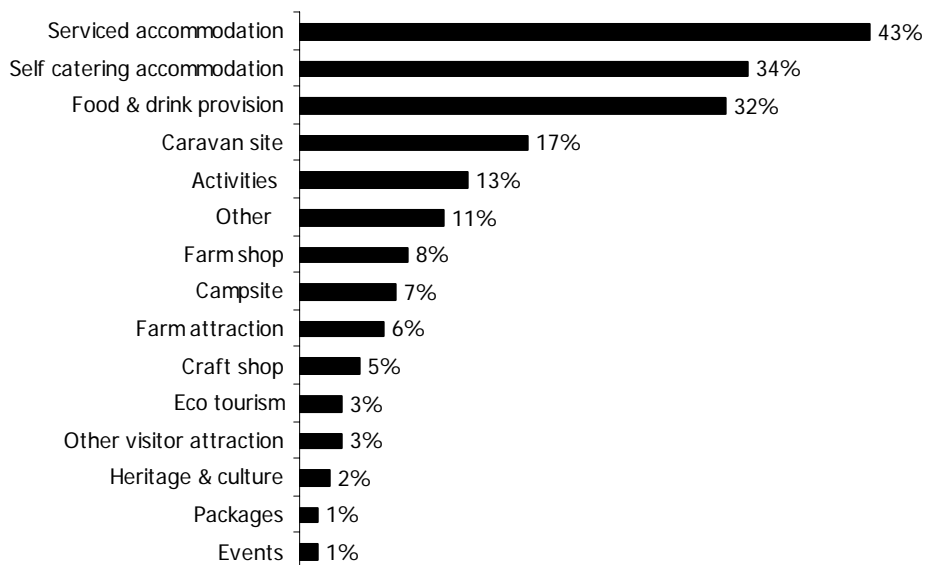
The majority of these respondents (81%) provided accommodation-based services for tourists. These included self-catering and serviced accommodation as well as camping and caravan sites.

The attraction and activity-based services which were currently provided included equestrian centres, farm shops, a golf course, a maize maze and cycle hire.

5.15 Services currently provided by farm tourism businesses

Active farm tourism businesses were asked which services they currently provide for tourists on their farm.

Services currently provided for tourists (base 221)



Serviced accommodation (43%) and self-catering accommodation (34%) were the tourism services most frequently provided by respondents followed by the provision of food & drink (32%).

Caravan sites were provided by 17%, activities by 13%, farm shops by 8% and camp sites were provided by 7%.

Less frequently provided services included farm attractions (6%), and craft shops (5%).

A minority of respondents provided each of eco-tourism, other visitor attractions, heritage & culture, packages and events.

Other services mentioned included clay pigeon shooting, organic courses, ice cream business, shops and an outdoor activity centre.

Table 6. Existing Tourism Business Diversification by sub-region

Planned Activities	Cheshire	Cumbria	Derbyshire	Gtr. Man	Lancashire	Merseyside	Total
Serviced accommodation	27	44	1	2	18	3	95
Self catering accommodation	6	46	2	3	17	1	75
Food & drink provision	17	32	1	3	17	1	71
Caravan site	4	20	1	0	9	4	38
Activities	4	17	0	1	6	0	28
Other	2	9	2	3	7	1	24
Farm shop	2	5	0	1	9	1	18
Campsite	2	10	0	0	3	1	16
Farm attraction	4	5	0	1	4	0	14
Craft shop	2	2	0	1	5	0	10
Other visitor attraction	4	0	0	0	3	0	7
Eco tourism	1	4	0	0	2	0	7
Heritage & culture	0	1	0	0	4	0	5
Packages	0	2	0	0	1	0	3
Events	0	1	0	0	2	0	3
Total	75	198	7	15	107	12	414

The 221 tourism related businesses accounted for 414 tourism business activities i.e. many businesses offered more than one service, for example an accommodation provider may also provide food and drink or a farm shop.

Cumbria respondents provided most services, followed by Lancashire respondents and Cheshire respondents.

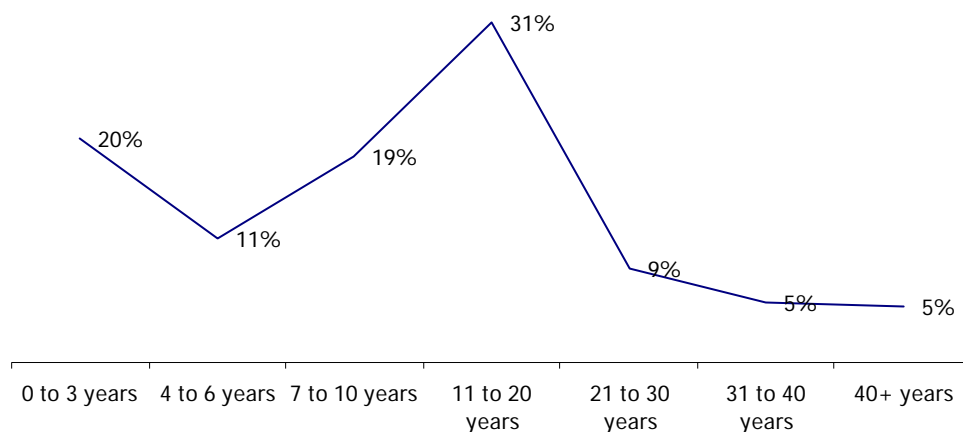
Although many plans for farm-based tourism operations were accommodation-based, there were numerous plans for activity-based tourism businesses.

The high proportion of planned self-catering accommodation might complement the existing serviced accommodation bed stock.

5.16 Number of years operating farm tourism business

Respondents were asked for how many years they had been operating their farm tourism business.

**Number of years operating farm tourism business
(base 221)**



Length of operating farm tourism businesses ranged from less than three years to over 40 years.

Half the respondents (50%) had been operating for over ten years and almost a third of respondents (31%) had been operating their business for between 11 and 20 years.

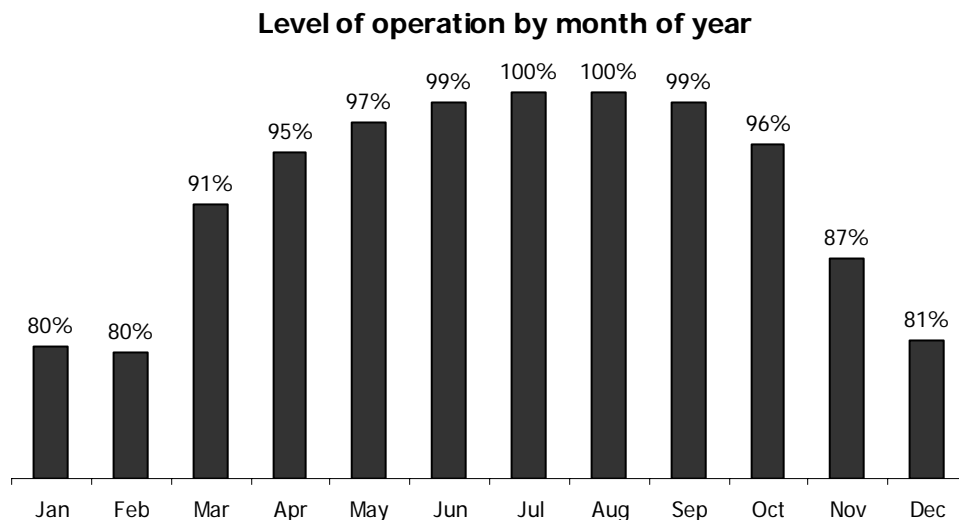
Under a half (40%) had been operating for ten years or less and a fifth (20%) had been operating their business for less than 3 years.

The mean length of operating the farm-tourism business was 14.1 years. The average age of accommodation providing businesses was 14.8 years and of non-accommodation providers was 10.7 years.

Further analysis shows that whilst only 16% of accommodation-based businesses were less than 3 years old, 42% of (the minority) non-accommodation businesses were less than 3 years old.

5.17 Trading months

Respondents were asked in which months of the year they operated their farm tourism business.



The majority of respondents (78%) said they operated⁴ their farm tourism business in all months of the year.

The peak season ran from April to October with at least 95% of businesses operating during those months.

December through to the end of February were the months in which the fewest businesses operated (80%).

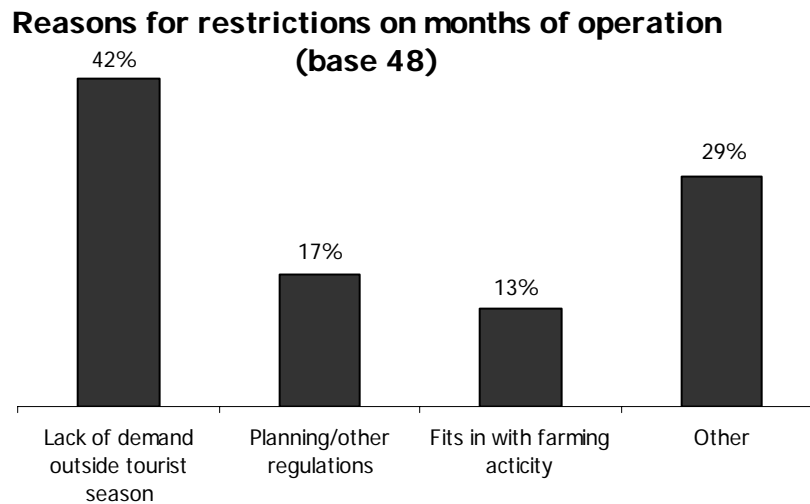
Non-accommodation businesses showed greater polarity than accommodation providers, with none operating in December, January and February.

Whilst the majority of businesses said they operated all year round, a distinction was not made between being available for business and being active in the market place.

⁴ Open for business

5.18 Reasons for restrictions to trading months

The minority of respondents whose tourism trade was restricted to certain months of the year were asked the main reason that their farm tourism trade was restricted.



Forty-two percent of the respondents said that the reason they didn't operate in certain months was because there was a lack of demand outside of the tourism season.

A further 17% blamed restrictions on planning or other regulations and 13% said that the tourism business had to fit in with farming activity.

Other reasons given by individuals included bad weather and the need for maintenance.

5.19 Type of accommodation provided

Accommodation providers were asked which type of accommodation they provided for staying visitors on their farm.

Table 7. Accommodation provision

Serviced accommodation provision					
	Number of providers	Total units	Mean units per accommodation provider	Mean number of nights available in 2003	Mean occupancy rates 2003
Rooms	95	300	3.2	334.2	53.3
Bed spaces	95	606	6.7	333.3	51.4
Self-catering accommodation provision					
	Number of providers	Total units	Mean units per accommodation provider	Mean number of nights available in 2003	Mean occupancy rates 2003
Units (e.g. cottages)	75	179	2.3	342.59	59.0
Caravan pitches	38	731	18.3	288.8	46.1
Camping pitches	16	392	23.1	259.7	51.3

Serviced accommodation was provided by 95 respondents with a mean number of rooms available of 3.2 and a mean number of bed spaces available of 6.7

Self catering units were provided by 75 respondents with a mean of 2.3 units (e.g. cottages).

Caravan pitches were provided by 38 respondents at a mean of 18.3 pitches per site and camping pitches were provided by 16 respondents at a mean of 23.1 pitches per site.

5.20 Nights available

Respondents were asked how many nights of the year their accommodation was available for staying visitors in 2003.

Respondents offering serviced accommodation were available for visitors for a mean 334 nights of 2003. Those offering self catering units were available for a mean 343 nights in 2003.

Caravan pitches were available for a mean 289 nights in 2003 and camping pitches for a mean 260 nights in 2003.

5.21 Occupancy rates

Respondents were asked the number of overnight stays on their farm in 2003 and the relevant room, bed and site occupancy rates were calculated.

For serviced accommodation the mean room occupancy rate was 53% and the mean bed occupancy rate was 51%.

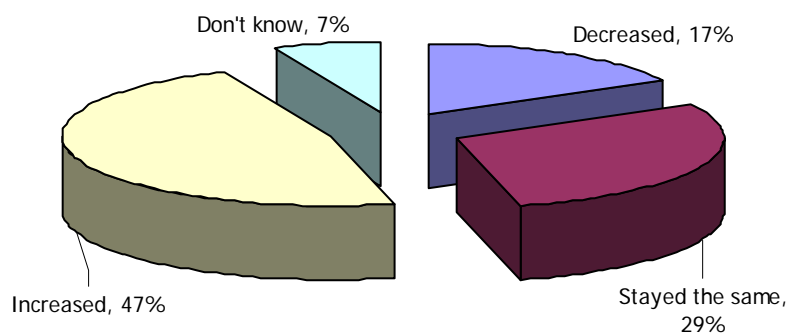
For self catering accommodation, the mean occupancy rates were 59% for self catering units, 46% for caravan pitches and 51% for camping pitches.

Respondents generally displayed low levels of accurate record keeping and awareness of occupancy rates. This element of the research was rather ad hoc.

5.22 Comparison of 2003 occupancy rates with previous years

Respondents were asked how their occupancy rates in 2003 compared with previous years.

Changes in occupancy levels 2002-2003



Just under half the respondents (47%) said their occupancy rates had increased compared with previous years and 29% said they had stayed the same.

17% of respondents said their occupancy rates had decreased and 7% couldn't answer.

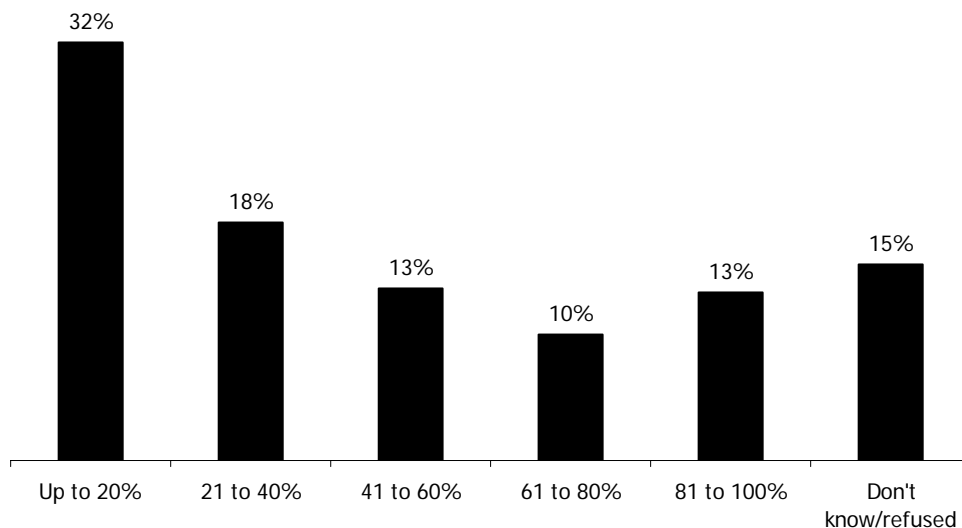
Cumbria respondents were more likely to say their occupancy rates had increased (51%) compared with Cheshire contacts (38%).

Farm tourism businesses were generally positive on this measure.

5.23 Proportion of annual farm income from tourism in 2003

Respondents were asked the proportion of their annual farm income which came from tourism in 2003.

Proportion of income from tourism activity



Almost a third of respondents (32%) said that income from tourism accounted for up to 20% of their annual farm income. A further 18% said it accounted for between 21% and 40% of their annual farm income.

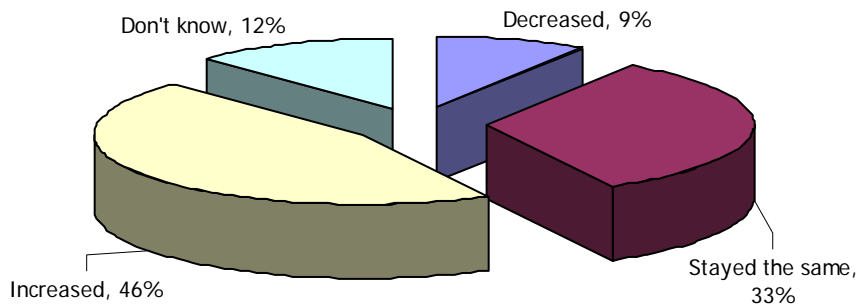
There was an even spread of around a third of respondents whose proportion of farm income ranged from between 41% and 60% (13%), between 61% and 80% (10%) and between 81% and 100% (13%).

The average proportion of annual income from tourism activity was 41%.

Tourism provided a minority of income for the majority of the farms who operated a tourism business. It provided a majority of income for a minority of the farms.

5.24 Comparison with 2002

Change in proportion of income from tourism 2002-2003



Almost half the respondents (46%) said the proportion of their income from tourism had increased. A further third (33%) said it had stayed the same.

Only 9% of respondents said the proportion of income from tourism had decreased. 12% couldn't answer.

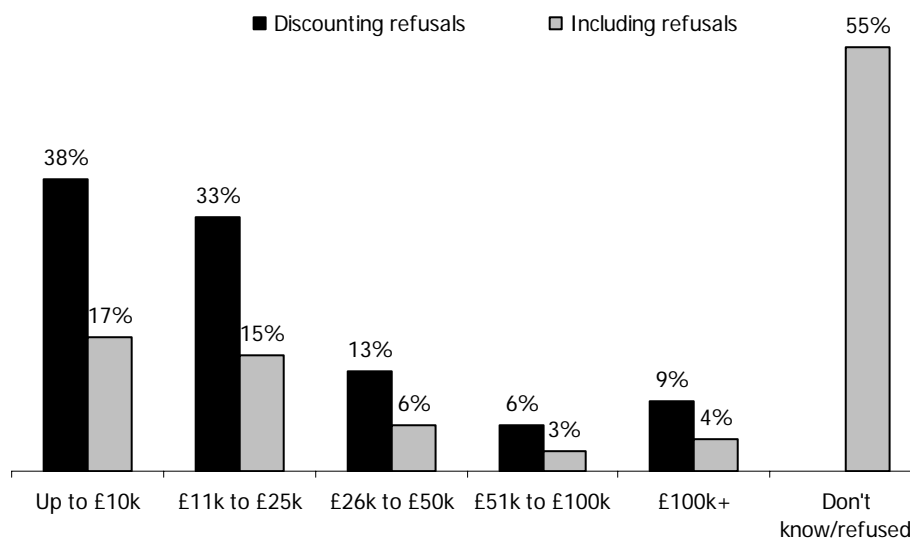
Respondents who operated a farm tourism business other than accommodation were more likely (55%) to say that the proportion of income from this side of the business had increased.

Farm tourism businesses were generally positive on this measure.

5.25 Approximate turnover of farm tourism business in 2003

Respondents were asked, approximately, the turnover of their farm tourism business in 2003.

Turnover from tourism activity in 2003



Discounting a substantial number of refusals, 38% of respondents said that their turnover from tourism activity was less than £10,000 per annum. A further 33% said the approximate turnover was between £11,000 and £25,000.

Thirteen percent of respondents said that turnover from tourism activity was between £26,000 and £50,000. Six percent turned over between £51,000 and £100,000 and nine percent turned over in excess of £100,000 from tourism activity in 2003.

The average turnover from farm tourism activity (for respondents who gave an answer) was £59,699

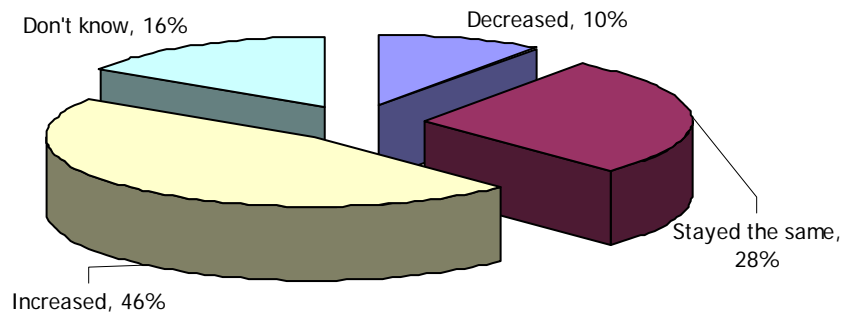
The average turnover for the 182 accommodation providers was £26,212. The average turnover of 38 non-accommodation providers was £243,875 indicating fewer but larger businesses. The average figures are skewed by a very few businesses turning over in excess of £500,000.

Five of the £100k+ businesses were located in Lancashire, three in Cumbria and one in Cheshire.

For the majority of farms who operated a tourism business, the turnover was less than £25k per annum indicating a supplementary income.

5.26 Comparison with 2002

Change in turnover 2002-2003



Almost half the respondents (46%) said that annual turnover from tourism activity had increased compared with the previous year. A further 28% said it had stayed the same.

Ten percent said turnover had decreased and 16% couldn't respond.

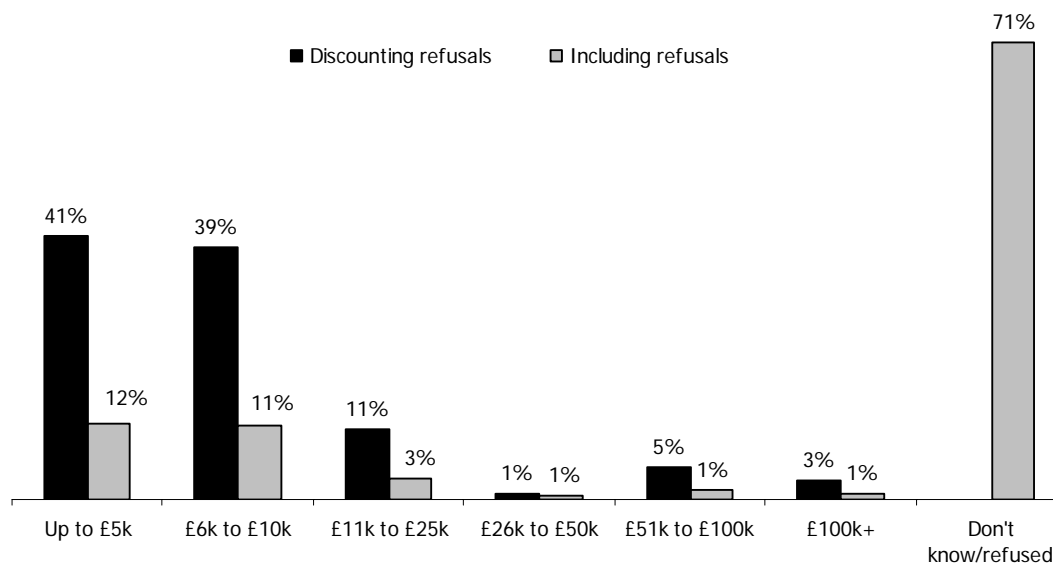
Further analysis shows that the turnover for none of the non-accommodation businesses had decreased and that it had increased for 58% of these businesses.

Farm tourism businesses were generally positive on this measure.

5.27 Gross profit from farm tourism business in 2003

Respondents were asked, approximately, the gross profit from their tourism business in 2003?

Gross profit from tourism activity in 2003



Discounting refusals, 41% of respondents said the gross profit from tourism activity turnover was less than £5,000. A further 39% said it was between £6,000 and £10,000 and 11% said it was between £11,000 and £25,000.

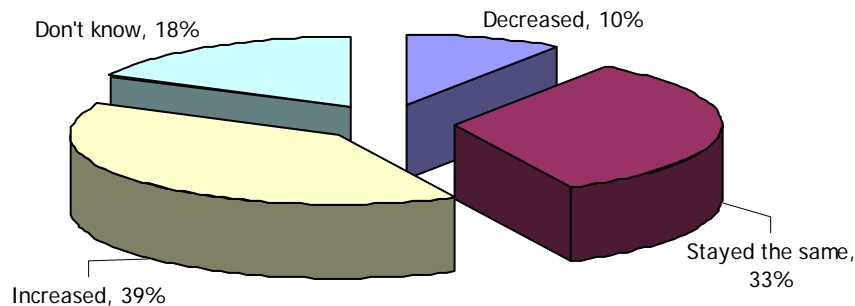
A minority of respondents made a gross profit of greater than £26,000 in 2003.

The mean gross profit from tourism activity was £20,853 in 2003. For accommodation providers it was £16,055 and for non-accommodation providers it was £55,400. However, these figures are skewed by a very few businesses making profits in excess of £100,000.

For the majority of farm tourism businesses, the gross profit from tourism activity in 2003 was less than £10,000 indicating a supplementary income.

5.28 Comparison with 2002

Change in gross profit 2002-2003



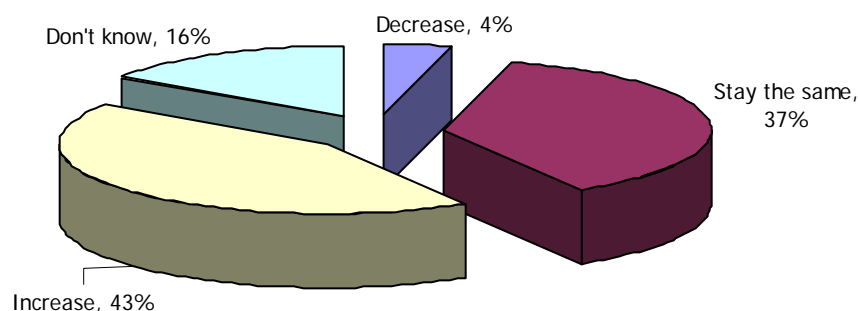
39% of respondents said that their gross profit from tourism activity had increased on the previous year and a further 33% said it had stayed the same. Only 10% said it had decreased and 18% couldn't respond.

Farm tourism businesses were generally positive on this measure.

5.29 Anticipated change in gross profit from farm tourism business in next 12 months

Respondents were asked what expectations they had for the gross profit from their tourism business in the next 12 months.

Anticipated change in gross profit in next 12 months



43% of respondents anticipated that their gross profit from tourism activity in the next 12 months would increase. A further 37% felt it would stay the same.

Only 4% felt gross profit would decrease and 16% couldn't answer.

Further analysis shows that Cheshire respondents were more confident of increasing profits in the future with 51% forecasting an increase compared with 39% of Cumbria respondents.

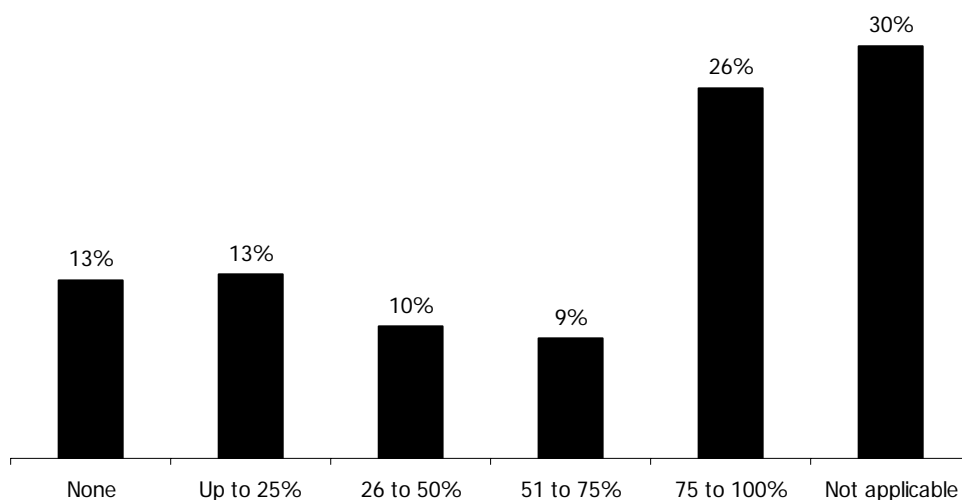
Non-accommodation providers were also more confident with 50% forecasting an increase in profits in the next 12 months.

Farm tourism businesses were generally positive about the future profitability of their tourism business.

5.30 Proportion of food used provided by local producers

Respondents were asked what proportion of the food they used came from local food producers

Proportion of food from local producers



Over a quarter of respondents (26%) said that local food provided between 75% and 100% of their usage. A further 9% of respondents said it provided between 51% and 75% of their usage.

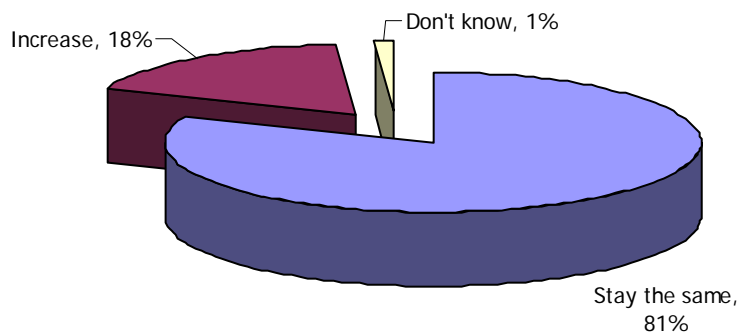
Ten percent said local food made up 26% to 50% of their usage and 13% said it constituted up to a quarter of their usage.

Thirteen percent of respondents said they used no local food and a further third of respondents (30%) felt the use of local food was not applicable to their tourism business.

Further analysis shows that Cumbria respondents were more likely to use locally produced food with almost 40% saying that at least 50% of their food was locally produced.

5.31 Intentions for use of locally produced food for the next 12 months

Anticipated change of use of local food in next 12 months (base 131)



Those respondents to whom the use of local food was applicable to their business were asked if there were any anticipated changes in its use in the next 12 months.

Whilst the majority (81%) felt their use of locally produced food would stay the same, 18% felt their use would increase in the next 12 months.

5.32 Extent to which locally produced food is a feature of farm tourism

Respondents were asked if they made local food a distinctive feature of the visitor experience.

Sixty-two respondents (28%) said they did. Comments included

"Advertise food as being from local produce and home made"

"Everything sold in the shop is directly produced from their pig"

"Just use Cheshire products wherever possible: dairy, meat and honey"

"Mentions the use of local produce (including their own) in their advert in 'country living' magazine"

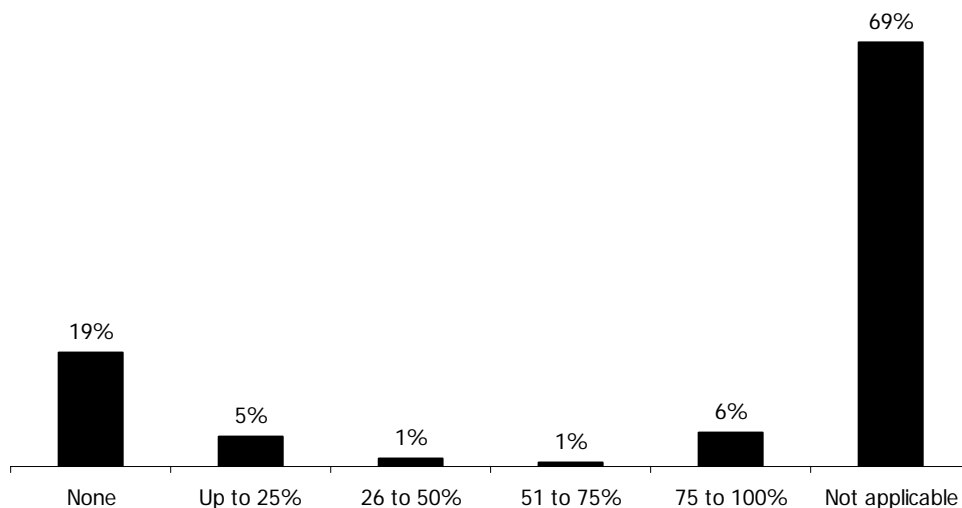
"Will do in the future"

The supply of food from local producers was important to a large minority of farm tourism business and was anticipated to grow in importance.

5.33 Proportion of craft supplies provided by local providers

Respondents were asked the proportion of their craft supplies which were provided by local producers.

Proportion of crafts from local producers



The majority of respondents either felt that crafts from local producers were not relevant to their business (69%) or they did not use them (19%).

A minority of respondents (13%) made use of locally produced crafts in their farm tourism business.

5.34 Intentions for use of locally produced crafts for the next 12 months

Of the 40 respondents, 26 felt their use of locally produced crafts would stay the same and 12 felt their use would increase over the next 12 months.

5.35 Extent to which locally produced crafts is a feature of farm tourism

Only 18 respondents said that locally produced crafts were a feature of their farm tourism business. Comments included:

"Identify local crafts with a local label"

"Locally painted cards and locally made soap and hand cream are sold as well as used"

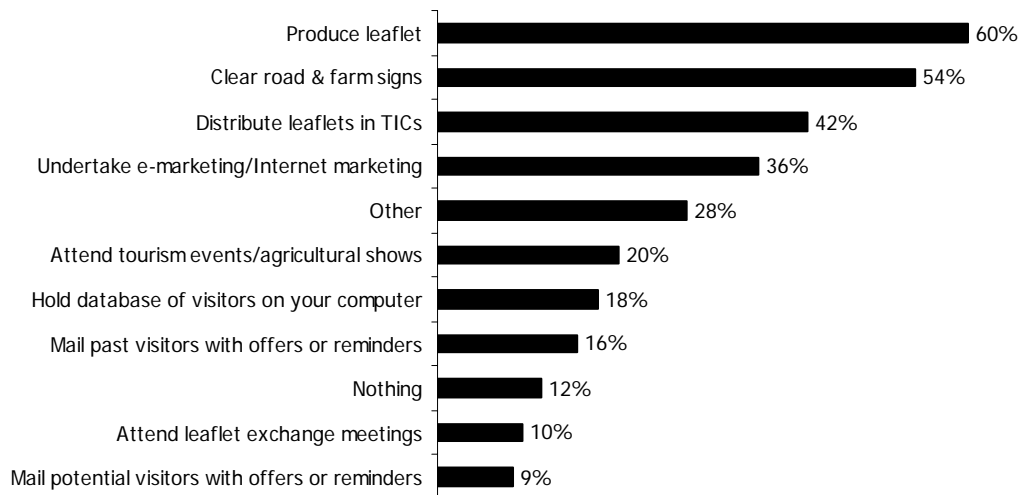
"Corn dollies business is run by her husband. All supplies produced by him"

Local craft supplies were important only to a small minority of farm tourism businesses

5.36 Marketing activities undertaken

Respondents were asked which formal marketing activities they undertook to promote their farm tourism business in 2003.

Marketing & ICT activities undertaken in 2003



The most frequently used marketing activities were the production of a leaflet (60%) and the use of clear road and farm signs (54%).

Forty-two percent distributed leaflets in TICs and over a third (36%) undertook e-marketing or web-site marketing. 20% attended tourism events or agricultural shows and 10% attended leaflet exchange meetings.

Almost a fifth (18%) of respondents held a computer database of visitors and 16% mailed past visitors with offers or reminders and 9% mailed potential visitors with offers and reminders.

Other marketing activity mentioned included card-based databases of previous visitors, marketing through agencies and leaflet distribution through different channels.

"Most marketing is done through an agency"

"Has records of past visitors but not on computer"

"Uses distribution company for leaflets and supplying to their customers"

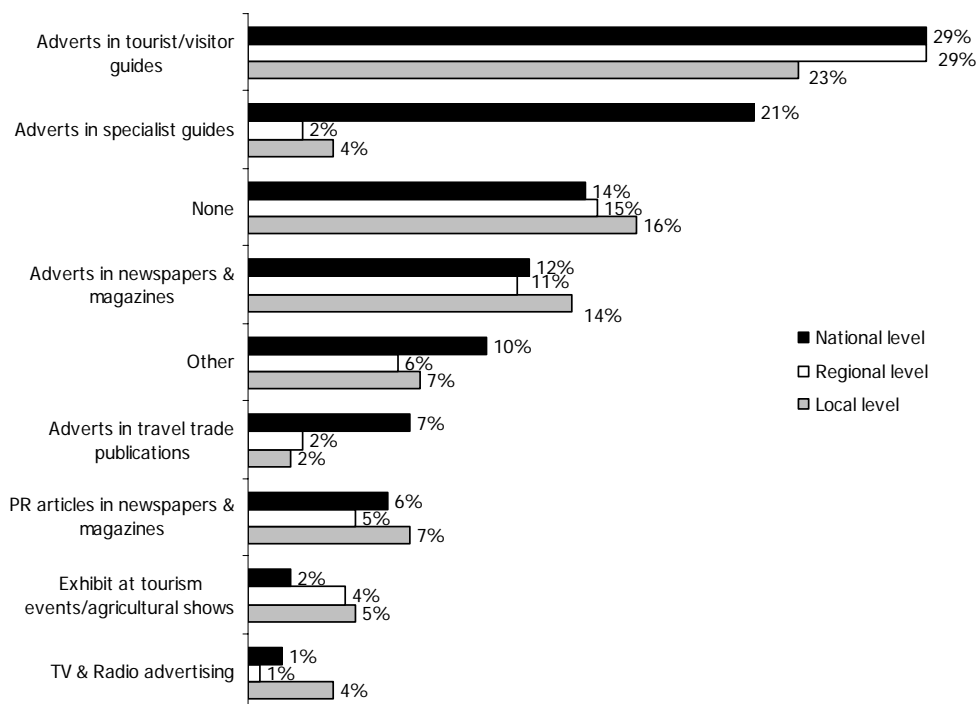
Twelve percent of respondents undertook no marketing activity.

The production and distribution of leaflets and provision of signage is the extent of the majority of farm tourism businesses' marketing activity. However, over a third of businesses are marketing on-line.

5.37 Media channels used

Respondents were asked which media channels they had used to promote their farm tourism business in 2003 and at what level.

Media channels used at local, regional and national level in 2003



At a national level, the most frequently used media channels included advertising in tourist and visitor guides (29%), adverts in specialist guides (21%) and adverts in newspapers and magazines (12%).

At a regional level, the most frequently used media channels included advertising in tourist and visitor guides (29%) and adverts in newspapers and magazines (11%).

At a local level, the most frequently used media channels included advertising in tourist and visitor guides (23%) and adverts in newspapers and magazines (14%).

A minority of respondents used travel trade publications, PR, tourism events and shows and TV & radio advertising, at national, regional and local levels.

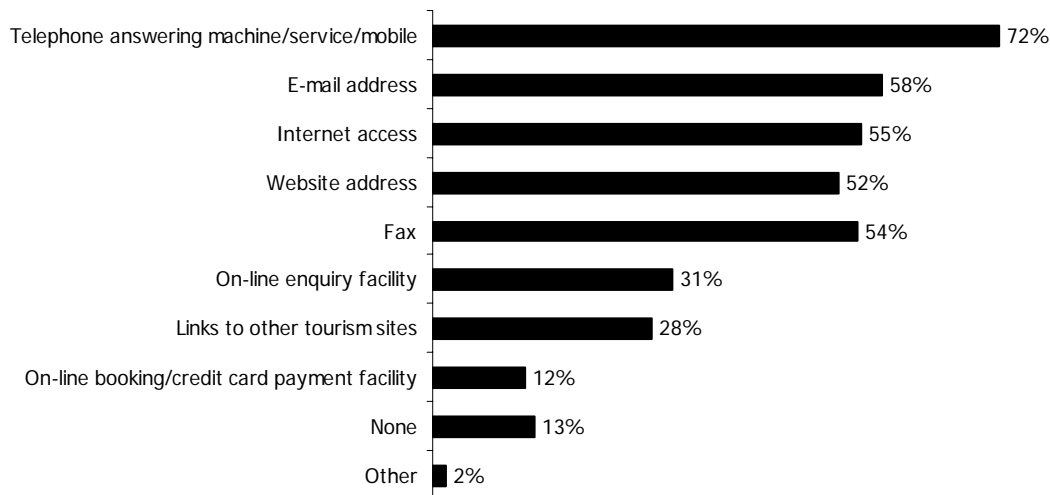
Other channels mentioned included "communal marketing" through farm accommodation groups, FarmStayUK, directories, the Tourist Board, individual guides, Yellow pages, charity events and farmers' markets.

Advertising in tourist and visitor guides and advertising in newspaper magazines were the most frequently used media channels at a local, regional and national level.

5.38 Information and communications technologies used

Respondents were asked which information and communications technologies they had used in their farm tourism business in 2003.

ICT used in farm tourism businesses in 2003



The most frequently used IC technology in 2003 was the telephone answering machine/service/mobile which was used by 72% of respondents.

An e-mail address (58%), Internet access (55%), a Website address (52%) and a fax (54%) were used by more than half the respondents in 2003.

On-line enquiry facility (31%) and links to other tourism web sites (28%) were used by round a third of respondent. An on-line booking / credit card payment facility was used by 12% of respondents.

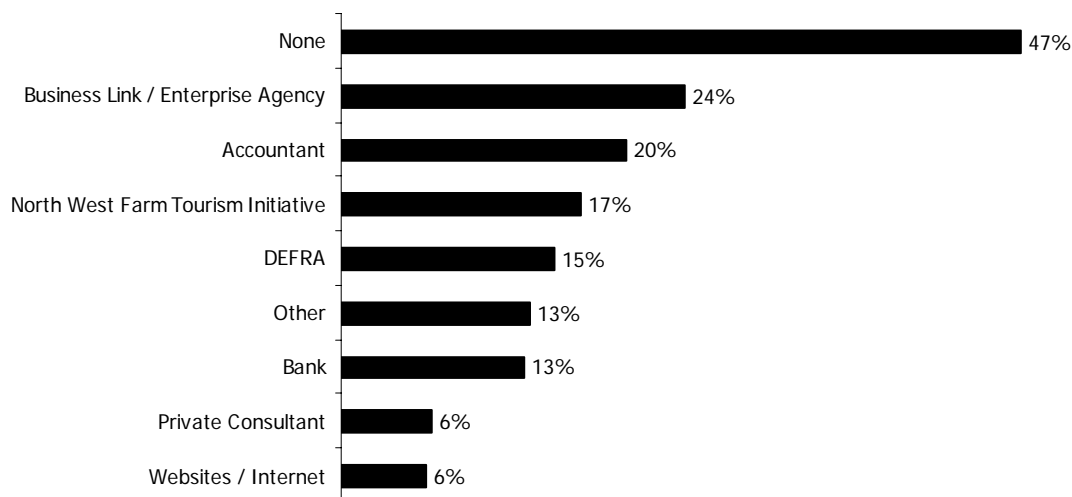
Thirteen percent used no IC technology in 2003.

The majority of farm tourism businesses use ICT in their business. Telephone related equipment is the most frequently used and e-mail and Internet use is common.

5.39 Sources of business advice

Respondents were asked from whom they had received business advice relating to their farm tourism business in 2003.

Sources of business advice used in 2003



Of the given list, the most frequently used source of business advice was Business Link / Enterprise Agency, mentioned by 24%. An accountant had been used for business advice by a fifth (20%) of respondents.

The North West Farm Tourism Initiative had been used by 17% of respondents while 15% had sought business advice from DEFRA, 13% from a bank, 6% from the Internet and 6% from a private consultant.

Other sources of business advice mentioned Cumbria Tourist Board, North West Tourist Board, Farmlink, Pendle Enterprise Trust, and Rural Futures.

Almost half (47%) of respondents had not received business advice from any organisation in 2003.

Under a fifth of respondents had used the North West Farm Tourism Initiative for business advice in 2003.

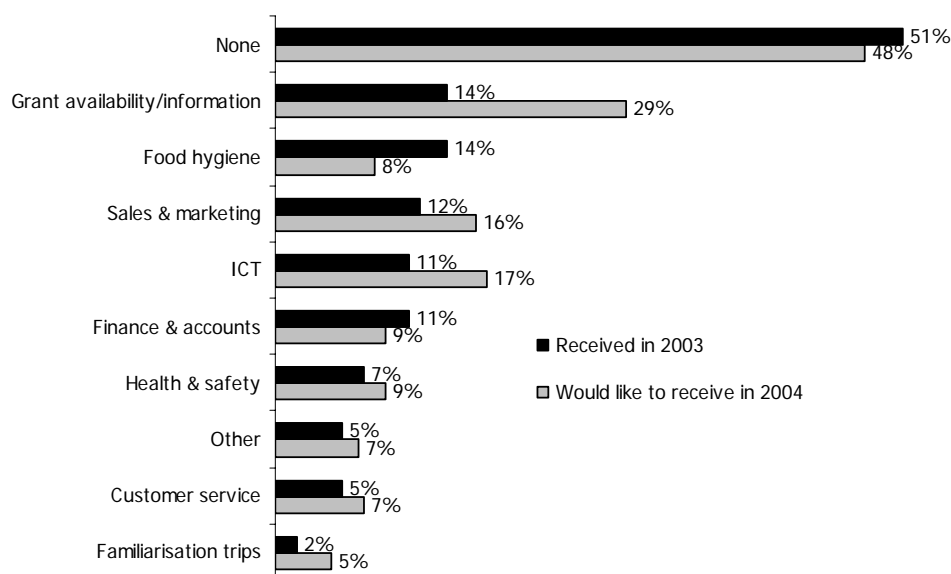
5.40 Training and business advice received

Respondents were asked what training and business advice relating to their tourism business they had received in 2003.

5.41 Training and business advice required

Respondents were asked what training and business advice relating to their tourism business they would like to receive in 2004.

Training & business advice received in 2003 and required in 2004



Whilst just over half of the respondents had not received (51%) any training and business advice in 2003 and just under half (48%) did not require any such advice in 2004, others had received a range of advice and were interested in receiving more.

Grant Availability and Grant Information had been received by 14% of respondents, Food Hygiene by 14%, Sales & Marketing by 12% and ICT by 11%.

Between a quarter and a third (29%) of respondents expressed an interest in receiving information about Grant Availability in 2004, 17% were interested in training and advice in ICT and 16% were interested in Sales & Marketing. Only 8% expressed an interest in receiving advice on Food Hygiene.

Health & Safety (7%), Finance & Accounts (11%), Customer Service (5%) and Familiarisation Trips (2%) had been received by a minority of respondents.

Similarly, a minority of respondents expressed an interest in receiving training and advice in 2004 on Health & Safety (9%), Finance & Accounts (9%), Customer Service (7%) and Familiarisation Trips (5%).

Other areas of training and business advice relating to their farm tourism business that respondents expressed an interest in receiving included;

“Anything to do with business, particularly marketing”

"First aid"

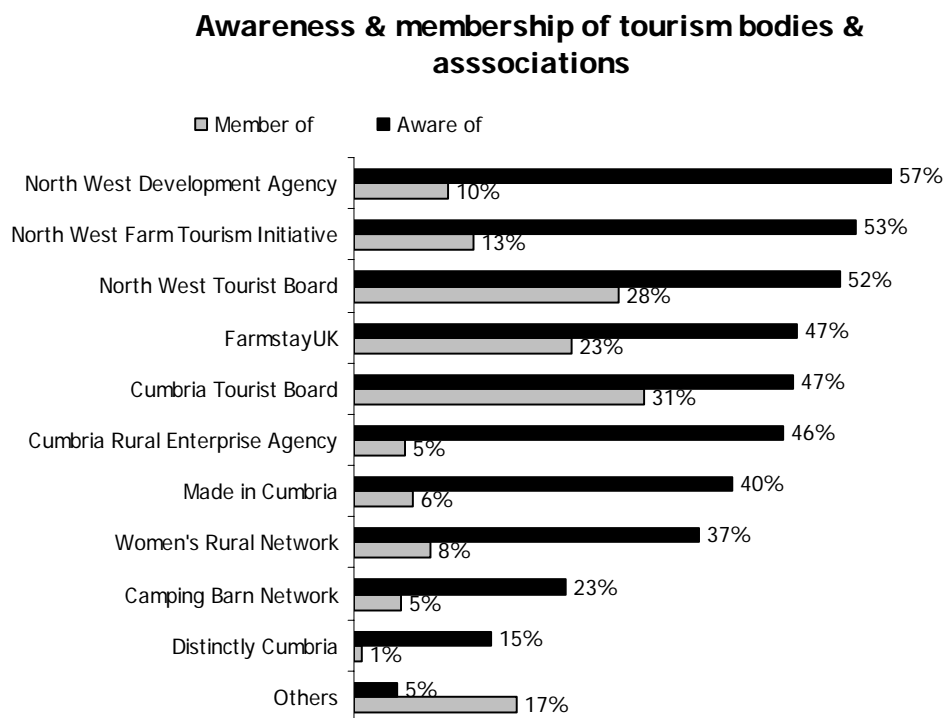
"Planning permission"

"Promoting information on local produce"

Information on Grant availability, ICT and Sales & Marketing were the most frequently requested business advice subjects for 2004.

5.42 Awareness and membership of tourism bodies and associations

Respondents were asked which tourism bodies or associations they were aware of or a member of.



Respondents showed the greatest awareness of North West Development Agency (57%), North West Farm Tourism Initiative (53%), North West Tourist Board (52%). All were mentioned by over half the respondents.

FarmStayUK (47%), Cumbria Tourist Board (47%), Cumbria Rural Enterprise Agency (46%), Made in Cumbria (40%) and the Women's rural network (37%) were each mentioned by fewer than half the respondents.

Fewer than a quarter of respondents showed awareness of Camping Barn network (23%) and Distinctly Cumbria (15%).

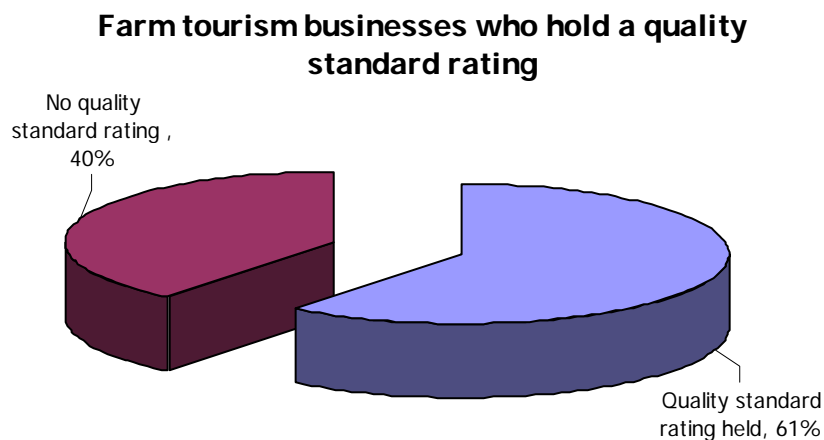
Membership among respondents was greatest of Cumbria Tourist Board (31%), North West Tourist Board (28%) and FarmStayUK (23%)

Respondents mentioned a range of 20-30 other tourism-related organisations that they were members of or were aware of.

Over half of respondents were aware of the North West Farm Tourism Initiative.

5.43 Quality ratings held

Respondents were asked what quality standard ratings their farm tourism business held.



Quality standard ratings of some sort were held by 61% of the farm tourism businesses interviewed.

The majority of respondents held a star or a diamond quality standard rating for their farm-tourism business. These ranged from listings to 5 diamonds.

Many businesses held quality ratings for both their serviced accommodation and their self-catering accommodation.

The following table shows the number of businesses with either a diamond (B&B) or crown (self catering) rating.

Table 8. Quality ratings held

Rating	Diamonds (B&B)	%	Star (self catering)	%
1	0	0%	1	2%
2	2	3%	0	0%
3	21	35%	18	35%
4	36	60%	29	57%
5	1	2%	3	6%
Totals⁵	60		51	

Four diamond (60%) and 4 star (57%) ratings were the most frequent quality rating standards held by both serviced accommodation and self-catering accommodation businesses. These were followed by three diamond (35%) and three star (35%) ratings.

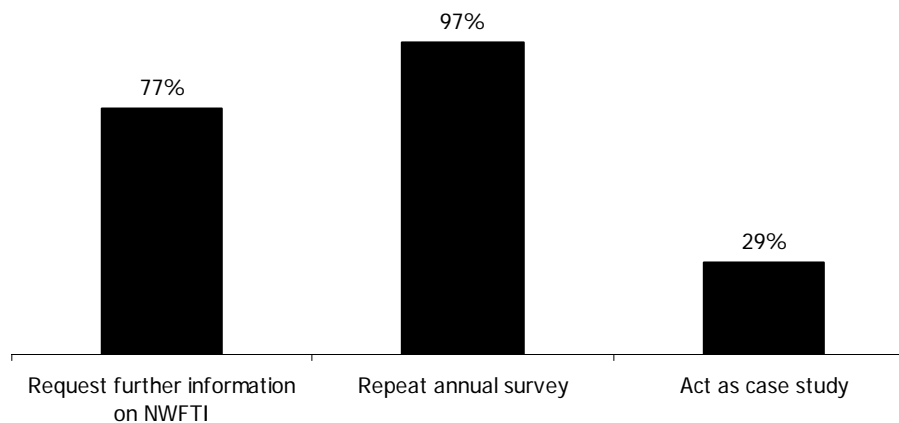
Other quality standard ratings mentioned included four pennants, silver AA award, BHS approved, locally inspected and listed.

⁵ approximate totals

5.44 Interest in receiving further information about NWFTI

Respondents were asked if they would like to receive further information about the NWFTI and the services it can offer farm tourism businesses.

Degree of interest in further participation in NWFTI evaluation



The majority of respondents (77%) would like to receive further information about the NWFTI and the services it offers.

5.45 Annual survey

Respondents were asked if they were happy to be interviewed about their farm tourism business next year.

The great majority (97%) of respondents said they would be willing to participate in the survey next year.

5.46 Case studies

Respondents were asked if they were interested in being included as a case study example of a farm tourism business in the North West.

Sixty-three (29%) of respondents said they would be interested in being included as a case study example.

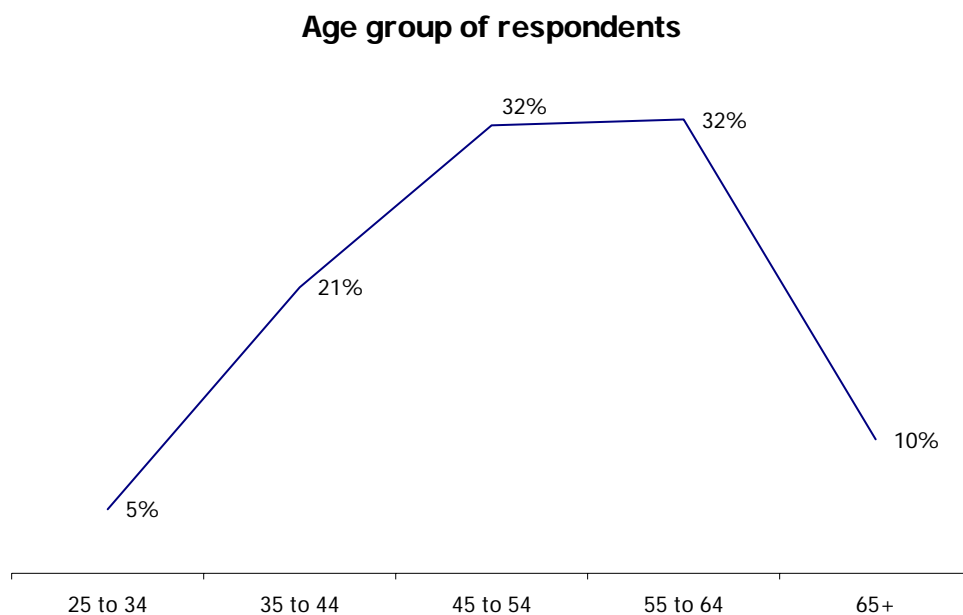
5.47 Important issues affecting farm tourism

Respondents were asked what they felt would be the most important issues affecting their farm tourism business in the next 12 months.

The weather was seen as the most important issue affecting business in the next 12 months, mentioned by 21% of respondents.

A range of other issues were mentioned by minorities of respondents. Issues concerning visitor numbers, marketing & promotion, business repairs & expansion and planning were leading issues.

5.48 Age of respondents

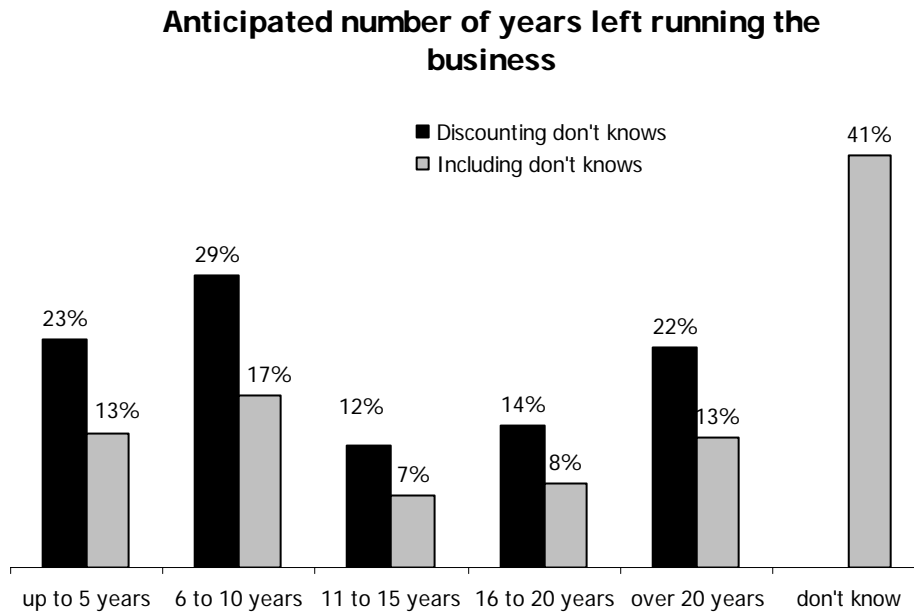


Two thirds of respondents (64%) were aged between 45 and 64 years with a further 10% aged over 65 years.

Just over a quarter of respondents (26%) were aged under 45 years.

5.49 Anticipated future personal involvement in farm tourism

Respondents were asked to estimate how many more years they expected to be personally running their farm tourism business.



Discounting refusals, 23% of respondents anticipated running their farm tourism business for only up to a further five more years.

A further 29% anticipated they would be running their farm tourism business for between six and ten more years.

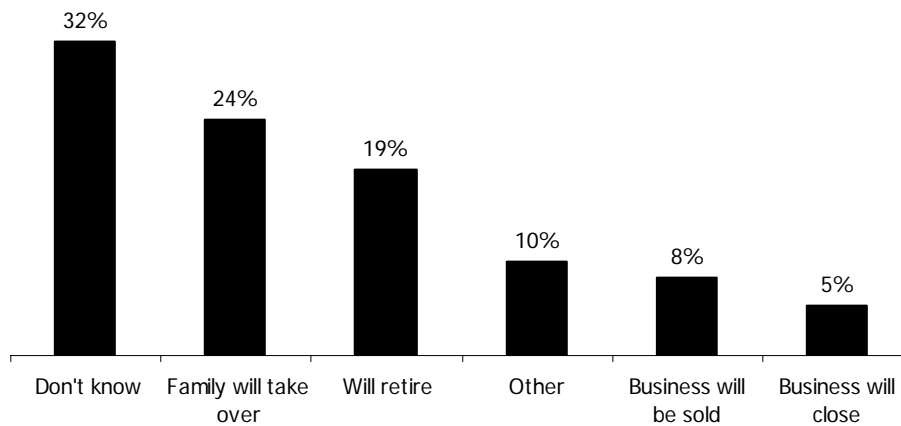
Almost a half (48%) anticipated running their business for at least a further eleven years with over a fifth (22%) expecting to run the business for over 20 years.

The average anticipated future personal involvement in farm tourism was 12 years 8 months.

5.50 Post retirement plans for farm tourism businesses

Respondents were asked what would happen after their personal involvement in their farm tourism business ended.

Plans for farm tourism business after retirement



Whilst a third of respondents didn't know the future, a quarter said the family would take over and a fifth said they would retire.

The sale of the business was prophesied by 8% and 5% said the business would cease.

"Caravan site will stay in the family. Daughter will take over"

"Hopefully his family will run it or will be sold as it is worth quite a lot"

5.51 Satisfaction with the survey

Respondents were asked if they were satisfied with the way in which the survey had been conducted.

All were satisfied.

6. Observations

As this document reports on the baseline study of farms in the North West, we are not currently in a position to make conclusions about the effectiveness of the North West Farm Tourism Initiative in achieving its objectives. The long term nature of the research project will allow for conclusions during the lifetime of the project.

The research does, however, allow for observations on, not only the findings of the research but also practical issues regarding the research including barriers, opportunities for change and other issues.

6.1 Awareness of high diversification rates in Cumbria

The relatively high rates of diversification into tourism among farms located in Cumbria may be partly due to the source of the contacts database.

Despite "diluting" the database provided by partners of the NWFTI with contacts from other sources, the proportion of Cumbria contacts who have already diversified remains high in comparison with other sub-regions. As the study goes forward, this will be considered when evaluating the success of the NWFTI in meeting its objectives.

6.2 Opportunities to overcome barriers to the research

In general, farmers were willing to participate in the baseline survey and in further research.

However, there were a few areas of questioning in which the participation rates were relatively low which leads to reduced confidence in the findings. Examples include many farmers' reticence in disclosing financial information about their business and inconsistency among accommodation providers in recording their occupancy levels.

To build trust and to increase levels of consistency, participant farmers in the end of year survey could be mailed with a letter prior to the telephone research. The letter would detail the objectives of the research as well as the type of information that is required. An NWFTI letterhead would be used.

There is the option to introduce some form of incentive to participate fully in the survey. A prize draw for a valued prize, for example.

6.3 Potential to use the DEFRA farm database for undertaking mail shots

Due to data protection issues, DEFRA have been unable to provide QA with their database of farm contacts for telephone research.

However, there is the opportunity to mail shot farms through DEFRA's own mailing process. This would involve supplying materials to DEFRA who would use their contacts database to mail farms in the North West. This would be a commercial transaction which can be costed.

The desired outcome would be to raise awareness of the NWFTI amongst farms who are currently aware of the initiative and encourage them to contact the NWFTI/research company, include their details on the master database as well as the extent to which they are interested or active in diversifying into tourism. QA could include them in the research and NWFTI could offer them support and advice where requested.

6.4 Baseline survey has acted as a representative for the NWFTI

The baseline survey has served to raise awareness of the NWFTI amongst farms and to generate interest in receiving information about the advice and support available. In total, 364 respondents said they would like to receive further information. Their details have been recorded on the master database. Feedback on the research provided by respondents through NWFTI project officers has also been positive.

6.5 Four year programme of research

QA have been commissioned to undertake the NWFTI evaluation for the remainder of its lifetime. The baseline survey is just the start of the four year programme. Quarterly surveys and case study examples are scheduled to be undertaken during the summer. The results will inform the research, feed the master database and be used in the end of year report.

QA will endeavour to maintain a consistent, though flexible, approach to the research, implementing improvements as required.