

## **Executive Summary of Baseline results (04/05)**

This year's 2005 baseline report contributed towards the third year of a four year research programme, aiming to build a comprehensive picture of the profile of farm tourism businesses within the North West. The summary below presents the results from on annual performance indicators set by the NWFTI.

The findings provide figures from surveys completed by farm tourism businesses in 2003, 2004 and 2005. The research is based on a representative sample of 2413 farm businesses that were contacted within Cumbria, Cheshire/Lancashire and other parts of the North West. The majority of responses are based on 549 surveys that were completed by active farm tourism businesses.

Please note that due to rounding a number of area figures are based on estimates and do not add up to the total North West figures.

### **The volume and geographic location of farms in the North West**

The research aimed to speak to a representative distribution of farms in the North West, with 38% located in Cumbria, 29% in Lancashire, 23% in Cheshire, 4% in Greater Manchester, 3% in Derbyshire and 2% in Merseyside.

Defra figures show that a total of 23,295 farms are based in the North West.

### **The number and location of farm tourism enterprises within this population**

In total 23% of North West farm tourism businesses operated an active farm tourism business. A further 12% of respondents said they were planning to diversify. Almost two thirds of respondents (65%) said they had no plans to diversify.

The survey figures indicate based on the farm population of 23,295 we estimate that **5,358** (23%) of farms run active farm tourism businesses within the North West region.

### **The number of farms with potential / interest in diversifying into tourism enterprises**

In the North West region our survey estimates that a further 12% of farms were planning to diversify, which gives us an estimated **2795** farms planning to go into tourism.

### **Types of farm tourism enterprise**

Serviced accommodation (33%) and self-catering accommodation (33%) were the tourism services most frequently provided sectors, followed by food & drink (24%).

Caravan sites were provided by 18%, activities by 14%, farm shops by 8% and campsites by a further 8%. Less frequently provided services included farm attractions (6%).

### **Volume & value of farm tourism**

Please note due to the sensitive nature of questioning, results are based on small sample sizes.

#### **Average mean occupancy rates**

Regional serviced accommodation average room occupancy rate was at 47% and the average bed occupancy rate was at 46%.

For self catering accommodation, the average unit occupancy rate was at 61%.

The average occupancy rate for caravan pitches was 49% and 37% for camping pitches.

### Tourism Turnover

The mean average percentage of income generated from tourism was estimated at 37% for North West farm tourism business

The estimated turnover generated ranged from 0 to £800,000. The mean average level of turnover per tourism farm was estimated at £37,213 for the region.

From these turnover figures we can estimate that the total turnover generated from farm tourism to the North West was at approximately £199.4 million.

### **Awareness and use of local produce and crafts**

A total of 47% businesses stated that a proportion of the food they used came from local food producers. A total of 22% stated that 76% to 100% of food came from local providers. The mean average proportion of local food producers used was 56%.

A total of 11% of businesses stated that a proportion of their businesses came from local craft providers. A total of 4% used 0% to 25% and 5% used 76% to 100%. The mean average proportion of local crafts used was 55%.

### **Increased income to local food producers and craft providers from farm tourism businesses and visitors**

A quarter of respondents (25%, 140 businesses) stated that they did make use of local food as a feature.

A total of 6% respondents said that locally produced crafts were a feature of their farm tourism business.

### **Use of marketing and ICT skills**

#### Traditional Marketing

The most frequently used marketing activities were the production of a leaflet (56%) and the use of clear road and farm signs (45%).

Other popular methods included the distribution of leaflets in TICs (39%) and undertaking e-marketing or web-site marketing (34%).

Just under a fifth of respondents held a database of visitors (19%), just under a fifth attended tourism events or agricultural shows (18%) and 15% mailed past visitors with offers or reminders.

A fewer number of establishments attended leaflet exchange meetings (8%) or mailed to potential visitors with offers or reminders (8%).

#### ICT Marketing

The most frequently used information and communications technology in the last 12 months was the telephone answering machine/ service/mobile, which was used by 71% of respondents.

E-mail address (55%), Internet access (54%), a Website address (52%) and a fax (50%) were each used by more than half of farm tourism business in the last 12 months.

On-line enquiry facility (29%) and links to other tourism web sites (25%) were used by round a third of respondents. An on-line booking / credit card payment facility was used by 11% of farm businesses.

### **Standards of farm tourism facilities**

Quality standard ratings of some sort were held by 41% of the farm tourism businesses interviewed.

Four diamond and 4 star (49%) ratings were the most frequent quality rating standards held by both serviced accommodation and self-catering accommodation businesses. These were followed by three diamond and three star (28%) ratings.