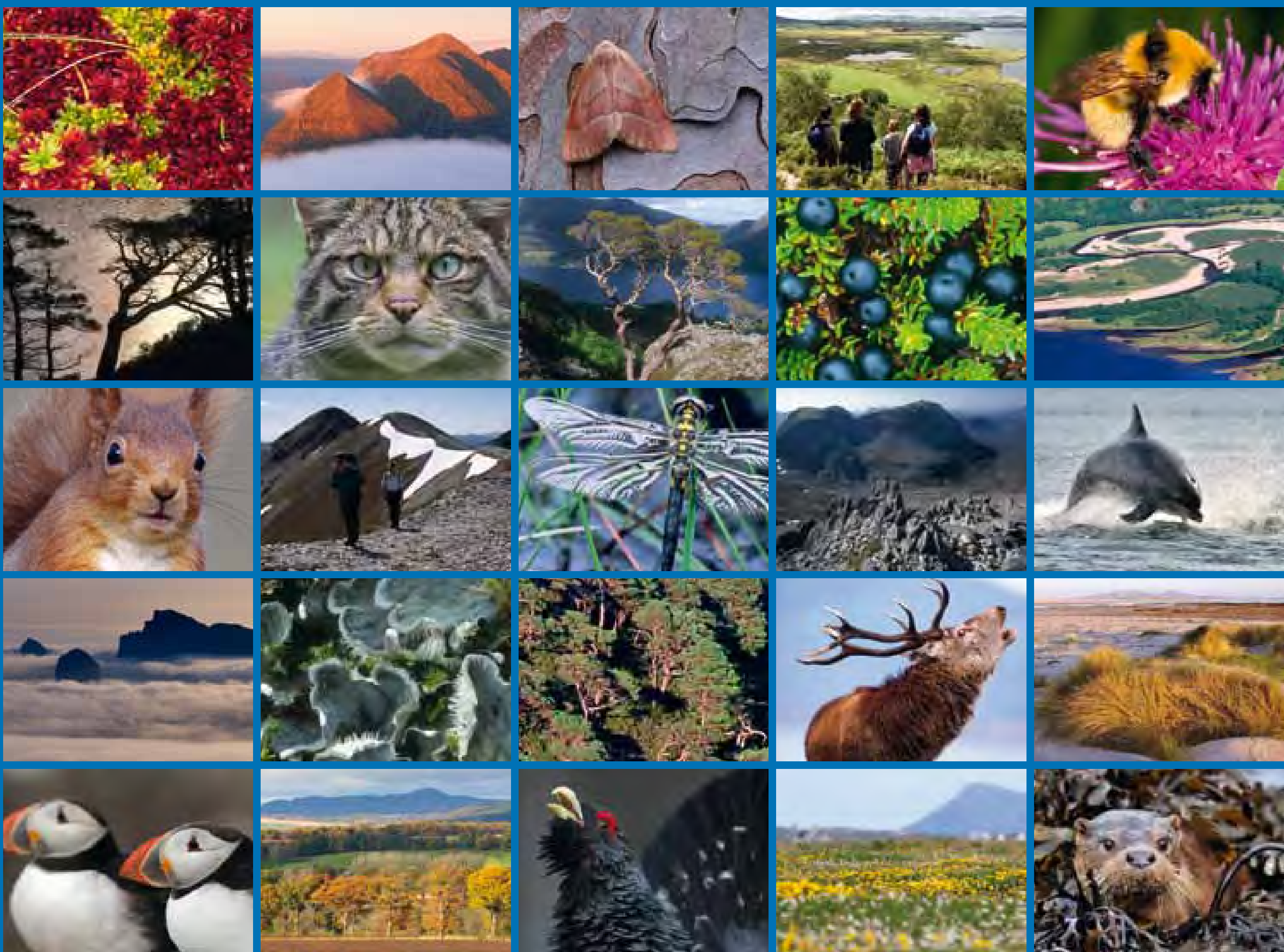
Scottish Natural Heritage
Commissioned Report No. 463

Agri-tourism in Southern Scotland



COMMISSIONED REPORT

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Agri-tourism in Southern Scotland

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COMMISSIONED REPORT

Summary

Agri-tourism in southern Scotland

Commissioned Report No. 463
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Background

Scottish Natural Heritage (SNH) commissioned this research to consider the potential to maximise the contribution of agri-tourism to the economy of Southern Scotland. The research sought to gain a clearer understanding of the context in which agri-tourism operates in Southern Scotland and in particular the regional market for farm-based tourism including visitor motivation and perceptions. Also considered was the potential for future development of the sector and the tools necessary to achieve this. Following a recent Scottish Enterprise report, agri-tourism is defined for the purposes of the research as: *"Tourism on a working farm in which visitors can experience a direct connection with the host farm, rural life and/or the local environment"*

Key findings

- The research highlights a synergistic relationship between tourism and agriculture policy direction.
- Data on the volume, quality and other characteristics of farm based accommodation, attractions and other facilities is disparate at both the national and local level.
- Alongside the provision of accommodation there are also a range of farm based attractions and events that form part of a much wider network of "rural" activities, contributing to the overall visitor experience.
- Secondary research suggested that while most people have been on, or would consider, a rural holiday in Scotland, a relatively small proportion of people have actually stayed on a farm. Whilst the majority of respondents would consider staying on a farm in the future, respondents appeared to be less interested in the experience of being on the farm per se, and more attracted to the opportunity to be in a rural location and the access this gives them to experience other parts of rural life.
- "Working farm" appealed more to those who have previously stayed on farms than those who had not, although good proportions of both groups said it was not important. This could have implications for taking a "broader" view of accommodation that is classified as "farm" based (e.g. farm steadings and cottages).

Recommendations

The basis for future development should be linked to specific actions that focus on the consumer, sector visibility and commerciality and expertise. The report sets out a list of actions through which to take forward these principles. These are based around brand building; developing and promoting well organised and effectively delivered set of "experiences"; ensuring a framework for quality across the farm tourism sector; and the public and private sector working collaboratively to develop the sector. Addressing and implementing many of the actions will require partnership across a range of stakeholders, including SNH, Dumfries & Galloway Council, Scottish Borders Council, Southern Uplands Partnership and private sector partners. These partners will need to take ownership of the recommended actions and facilitate their implementation and ongoing monitoring. A discussion on ownership of the actions has begun and this will need to be continued to develop clear lines of responsibility and accountability for delivery.

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Acknowledgements

Scottish Natural Heritage and the study team wish to thank all those who were involved in the research and participated in steering group meetings to shape the findings and recommendations.

1 INTRODUCTION

A meeting of key stakeholders in Moffat in November 2010 explored the interest in the development of agri-tourism in Southern Scotland. Following a positive response at the meeting, Scottish Natural Heritage ("SNH") appointed PlaceFirst to investigate the potential to maximise the contribution that agri-tourism plays in the economy of Southern Scotland.

1.1 Study Objectives

The research seeks to gain a clearer understanding of:

- The existing research findings on agri-tourism - definitions, market segmentation, effect of initiatives - and examples of best practice in agri-tourism within Scotland, the UK and Europe.
- The current situation as regards agri tourism – what is the current provision of visitor facilities and accommodation on farms and estates, how many of these promote the fact that they are farm-based and among these, how do occupancy levels and visitor numbers compare with other similar businesses in the area.
- The regional market for agri-tourism – what is the level of demand for farm-based tourism in Southern Scotland and around what does it centre, i.e. farm stay holidays with a chance to be involved, rural cottages, activities, countryside experiences or farm shops and local food ?
- Visitor motivations and perceptions – motivations of those who undertake farm stay or other farm-based holidays and specifically seek them out; and wider public perceptions of what staying on a farm or visiting a farm would be like, what people would expect to see and be interested in doing. This will seek to establish how marketing as 'farm' or 'estate' compares with e.g. 'rural', 'wildlife', 'eco' and 'local food' as strong selling points.
- Farmer involvement – to what extent are farmers interested in providing more farming input to existing tourism businesses? Do those not currently involved in agri-tourism have interest in the sector? Are there barriers to involvement in farm-based tourism e.g. time, finance, information, infrastructure etc, which should be recognised / addressed?
- Future development – how might any proposals resulting from the research and simultaneous cluster work be developed, funded and implemented and by whom?

2 METHODS

2.1 Our Approach

The research team developed a fully tailored methodology to respond to the key issues and objectives raised in the project brief. A combination of qualitative and quantitative research methods were deployed. These were agreed with the Steering Group, were highlighted in the Project Initiation Document, and are explained in summary from here on.

2.2 Key methodological stages

The key stages of work were:

- Document review – of existing policy, strategy and best practice documentation and supplemented by academic and industry information.
- Review of supply information – including review of product information from a range of sources to assess level of supply of accommodation, activities and attractions across Southern Scotland.
- Interviews with key stakeholders – the primary research covered consultations with key representatives of organisations including SNH, Dumfries and Galloway Council, Destination Dumfries and Galloway, RSPB and other project partners. The purpose of the discussions was to understand the current market demand and supply for agri-tourism in Southern Scotland and the potential areas for growth and development moving forward.
- Analysis of market context and consumption trends – including analysis of the market context for agri-tourism based experiences and consumption trends in Southern Scotland and Scotland in comparison to the UK and internationally. This included market segmentation analysis provided using the Ark Leisure model and drive time demographic analysis of primary and secondary resident markets.
- Visitor motivations and perceptions – an on-line survey was carried out in conjunction with Visit Scotland. The questionnaire was signed off by SNH. The survey was undertaken in March 2011 and distributed by Visit Scotland to over 4,000 people registered with Visit Scotland, via an email which provided a link to the online questionnaire. The survey received 479 responses in total.
- Discussions on farmer involvement – in conjunction with Southern Uplands Partnership and Dumfries and Galloway Council the consultant team participated in a meeting held to discuss the engagement of farm tourism businesses in Dumfries and Galloway and the potential of a cluster group being formed. The opinions expressed have been used to shape the findings of this report.
- Analysis and Interpretation – Drawing together all the work stages to identify current supply and likely market demand, scale, profile and expectations of the market for agri-tourism. This includes recommendations on future development potential and needs and identifies the role of SNH and partners in terms of supporting and growing the sector.

The study team were responsible for the interviews with key stakeholders, the data review, the design of the questionnaire for the survey, and the analysis of survey data and findings. SNH provided the study team with the stakeholder contacts and signed off the questionnaire for the visitor survey and stakeholder consultations.

3 RESEARCH, STRATEGY & FUNDING CONTEXT

This study does not sit in isolation and it must refer to key policies, strategies and initiatives of sub-regional, regional and national significance and covering sectors such as farming, tourism and economic development. This section outlines existing policy and strategy documentation and is supplemented by academic and industry information.

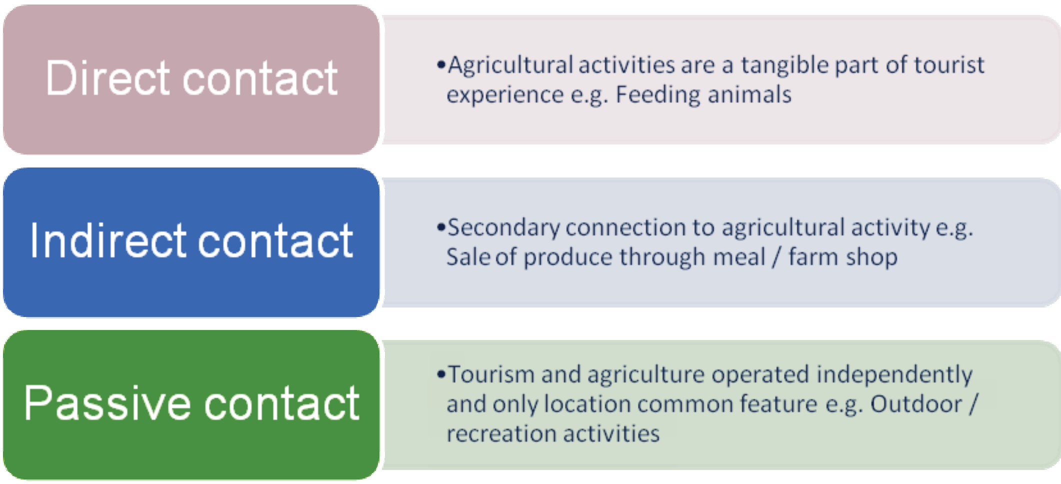
3.1 Definition of Agri-Tourism

For the purposes of this research the Scottish Enterprise definition of agri-tourism has been adopted. This defines agri-tourism as:

"Tourism on a working farm in which visitors can experience a direct connection with the host farm, rural life and/or the local environment"

There are of course, many forms of tourism that contribute to the overall definition, be it accommodation, tours and activities, retail sales (e.g. farm shops) and rural recreation.
The type of contact that the tourist experiences through agri-tourism will also depend on the nature of the activity. Recent work produced by Sharon Philip (2009) describes agri-tourism by three clear typologies of contact – direct, indirect and passive. The level of contact that the tourist experiences – and indeed will want to experience – will largely depend on their own characteristics and demands.

Figure 1 - Typology for defining agri tourism



Source: Philip et al (2009)

3.2 Farm diversification

Diversification is defined as the entrepreneurial use of farm resources for the purpose of producing non-agricultural commodities. Diversification is high on the agenda for key industry stakeholders (e.g. NFUS) and was recognised by many other partners as critical to supporting the rural economy in Southern Scotland and further afield.
In 2008/09 it was estimated that 42% of farms were engaged in some form of diversified activity, compared to 32 per cent in 2007/08[1]. In 2008/09, the average income for those farms engaged in diversified activities was £7,624 which is down slightly from the average figure of £8,758 in 2007/08. The majority of farms engaged in diversified activities recorded only one activity.

[1] Farm Business Incomes in Scotland 2008/9

The biggest diversified activity by far was renting out farm buildings, accounting for around two thirds of the total number of diversified activities (not including tourist accommodation). Just 9% of all farms surveyed had diversified to provide some form of tourism/recreational facilities and 20% in "“Other Miscellaneous Receipts”, which includes activities such as rural crafts and processing and retailing of farm produce.

There appears to be a large variation in the margins obtained from different activities. The highest separately identified margin was for renting out buildings, with an average of £6,500. Average income from tourist accommodation (£1,000) and recreation (£1,100) was a lot lower. Income from diversified activities, particularly those linked to tourism and recreation, has actually fallen. Therefore whilst a higher proportion of farms are looking to diversify their activities to provide an additional income to that from farming, average income from these activities is actually falling. Research in Southern Scotland reported that 21% of respondents suggested that less than 5% of the household income was generated by farm tourism. However, 36% of enterprise owners felt that without this income the farm business would struggle to survive (Gillespie, 2007).

Types of diversification

There are numerous examples of strong and successful diversification from across the UK and beyond. These range from conversions of farm property into B&B, self-catering or other accommodation, to more diverse projects that embrace visitor attractions (e.g. petting farms, farm shops, children’s activities) to more active attractions (e.g. quad biking).

The common aspect in all of the examples shown below is twofold. They embrace partnership and collaboration between multiple stakeholders and have identified innovative attractions with the visitor in mind.

Glenholme Wildlife Partnership

The Glenholme Wildlife Partnership is a partnership of five organisations – part-funded by the Making Tracks South of Scotland Nature Based Tourism Project (VisitScotland / EU) and by Leader+ (2000-06):

- The Glenholme Centre -working 1000 acre sheep farm. Guest house and Computer Training centre
- Cardon Farm – land owners
- Bairds Wine Centre – collaboration on wine breaks
- Tweeddale Wildlife Watch Group – participation in conservation activities
- Broughton Primary School – planning and development of pond area

Launched in 2005, the project comprises three main activities: the wetland watch area; the woodland watch area and a series of mainly but not exclusively upland walks. For the more energetic there is even a challenging pitch and putt for visitors to try their hand at. Access to all of these areas is free (although golf clubs and balls are available for hire from the Glenholm gift shop). In addition a tea room and small gift shop have been established which, alongside the guest house accommodation of the Glenholm Centre, will service these activities and fund the maintenance and development of the project.

The overall objective of the Glenholm Wildlife Project is to encourage more people to enjoy the glen, improve the wildlife habitat within the area, and provide better facilities and interpretation for visitors, all within a working farm. Success will be measured by tourism, farming and wildlife coexisting together and thriving off each other

High Head Sculpture Valley - Art to revitalize farmland

High Head Sculpture Valley is an example of using art to revitalize farm land through the creation of a 5 acres sculpture park on farmland previously used as a dairy farm. Additionally the family owned farm created a gallery space, a shop, workshops, a spa including a treatment room, pool and sauna, and play areas for children as well as a tea room to host visitors. The Farm has a strong "local produce ethos" with a minimum of 25% of food from Cumbrian suppliers and 85% of craft supplies sold in the 'Made in Cumbria' shop come from local providers.

Marketing for their farm tourism business was run by a professional public relations manager. It included the website as well as the production of leaflets. It was also advertised in local press and magazines. Business advice relating to the farm tourism business was received from Cumbria Woodland and the North West Farm Tourism Initiative. They also received 3 days of business training in the period of planning their diversification Cumbria Woodlands.

Diversification was necessary to supplement the income that could be derived from the land. The farm received support from the Cumbria Woodlands. With 12,000 visitors arriving during the business year in 2004, the overall farm turnover was dominated by tourism. The turnover from the tourism business reached a stunning £120,000.

The profit was mainly used to re-invest in future farm business development. The farm tourism business operates throughout the year. Visitors to the Sculpture Valley are mainly couples aged 45+ who tend to come from surrounding areas.

3.3 Key Strategies

There are a number of both agricultural and tourism focussed strategies, as well as wider economic, for both Scotland and Southern Scotland that are important to consider. This is because the issue of agri-tourism is one which spans both key sectors and has a role to play in delivering wider economic priorities.

A Forward Strategy for Scottish Agriculture (2006)

The strategy recognises that farming makes an important contribution to the development of tourism and recreation in terms of scenic value, wildlife and leisure facilities. The strategy recognises that:

'As well as maximising returns from traditional farming, opportunities for generating income include processing farm produce, retailing (for example through farm shops, farmers' markets and mail order) and entry into markets such as tourism, commercial recreation.......- all key priority industries for Scotland.

Whilst not specifically identified, this implies the diversification of farming into agri-tourism activities may be advantageous.

Scotland Rural Development Programme (2007-2013)

The potential for agri-tourism is also acknowledged in the Scotland Rural Development Programme 2007-2013, which states that 'Measures to improve agricultural/forestry performance will be important to meet the needs of the market as will diversification - encouraging new industries and linkages e.g. renewable energy, agri-tourism'. Furthermore, recent research undertaken by Scottish Enterprise highlights a positive market opportunity for agri-tourism in at least some parts of Scotland and suggests there is undeveloped potential.

Tourism Strategy for Scotland (2006-2016)

The latest Tourism Strategy for Scotland (2006-2016) suggests that the main types of break which will be in increasing demand in future are those linked to:

- interest in good health (so even more demand for activity breaks of all kinds);
- the use of a break as a personal reward or well-being experience (so strongly increasing demand for more spa/ pampering experience as well as good food and drink and other more hedonistic activities); and
- the increasing interest in extended education (so more demand for history and culture-related holidays).

It suggests that 'many also want a truly authentic experience'. It is these consumer insights which suggest that the tourism market in Scotland is changing, and that there is a market for agri-tourism products which provide different types of tourist experience.

Dumfries and Galloway Regional Economic Strategy (2008-2013)

The strategy suggests that despite Dumfries & Galloway's sluggish economic performance, the region has distinctive assets that can act as a platform for real growth, both now and in the future. The exploitation of its natural environment and the tourism market is one of these. While the region already exploits some of its natural assets (such as the internationally famous 7 Stanes mountain bike trails) Dumfries & Galloway has the potential - and the ambition – to be so much more.

The strategy is structured around four themes:

- Business Infrastructure
- Growing Businesses
- Quality of Life
- Developing a Competitive Workforce.

Cutting across all of these is the need to develop an innovative and sustainable rural economy, with tourism one of numerous key priorities. An expected outcome is for tourism growth in terms of volume and value; new products and catalytic investments.
Whilst agri-tourism specifically is not outlined, the strategy suggests that linking tourism to local food production & farming activities, organic agriculture, sustainable forestry and leisure for example, can make the region a magnet for both UK and foreign visitors.

Scottish Borders Regional Economic Strategy (May 2003)

The strategy states that an area of strength and opportunity with the long tradition in textiles and growth potential in, amongst others, the tourism sector where it has the substantial natural assets to support growth.

For a fragile rural economy such as the Scottish Borders the focus must be on businesses with an external focus and which demonstrate the potential to grow beyond local markets. The region's economy must move away from a structure of local price-based competition and engage more fully in the wider market. In areas such as tourism this means identifying and developing high quality, niche products.

Again, whilst there is no specific mention of agri-tourism there is an acknowledgement of the increased role that this sector, and niche products within this that can be offered through agri-tourism, can offer.

Dumfries and Galloway Regional Tourism strategy (March 2011) –

Strategy targets 2011-2016 include:

- Increase volume of overnight visitors – 10% increase in existing annual room occupancy levels in all accommodation across D&G
- Extend the tourism season – 15% increase in existing accommodation occupancy level outside the traditional main season (i.e. Mid-October to mid-April)
- Exceed national average of Star Grading in each accommodation category
- Increase areas green credentials / participation in Green Tourism Business Scheme
- Increase overnight visitor expenditure in real terms by 10% (above inflation)
- Increase in employment in the tourism sector by 5% in real terms
- Increase in training and skills
- Increase investment in product development and product innovation through an increase in overall Star grading
- Improve level of market data
- Increase levels of business tourism and other specialist market niche

3.4 Funds and Initiatives

Tourism Innovation Fund

The Tourism Innovation Fund (TIF) was launched in February 2009 as a vital part of a drive to encourage innovation in Scotland's tourism industry and promote growth. This Scottish Enterprise fund was based on the success of the previous Tourism Innovation Development Awards (TIDA) which supported 35 new and innovative experiences.

The Tourism Innovation Fund (TIF) provides matched funding of up to £30,000 and professional one-to-one advice to help develop and commercialise the very best innovative tourism ideas. TIF support is allocated via a competitive judging process. To be successful projects have to demonstrate industry-level tourism innovation combined with a real potential to achieve significant business growth as a result (for example, generating higher tourism spend; increasing overnight visitor numbers; getting visitors to stay longer; or extending the season out with peak months). The intention is for winning projects to become exemplars for Scottish tourism innovation and where possible be developed into case studies to help stimulate further innovation throughout the industry.

The innovative idea could be based on a product, service or business process but the fund does not support pure marketing projects that are intended to only promote existing products and/or experiences.

Example: Scottish Farmhouse Holidays (which was bought by Alba Travel in 2009)

- Offer a variety of Farm and country holidays throughout Scotland
- They have recently gained funding through the TIF to collectively market farm-stay providers of Scottish Farmhouse Holidays and will offer packaged 'Agritourism' experiences.
- The project aims to develop a programme with the working farms within the Scottish Farmhouse Holidays portfolio that truly enhances the visitor experience and shares best practice, and will develop a useful guide of all farm-related shops, events and activities throughout the annual calendar and to extend the existing portfolio in 2011 and 2012

Visit Scotland Growth Fund

The VisitScotland Growth Fund is available to constituted marketing groups of three or more tourism businesses and can provide support with 50% of approved total marketing costs - a minimum award of £5,000 to a maximum of £65,000. Marketing activity should be new or a further development of current activity which will generate additional visitors to Scotland. Funds are open to national, regional and local tourism groups to help them reach new target markets and increase visitor numbers.

An Active Growth Fund is also available to support businesses across the adventure travel sector to boost active and adventure travel during the 2011 Year of Active Scotland. The Active Growth Fund will support tourism businesses to work together to promote the vast range of activities Scotland has to offer. The fund is open to: ·

- Existing industry groups who can demonstrate that their project further develops current marketing activity or is 'new', that is, working with new partners, targeting new markets, new packages or offers or using new media et cetera.
- New collaborative groups formed to promote a specific activities in their area
- Activity providers collaborating with other tourism businesses, (e.g. accommodation providers) to create and market an 'activity package' or promotion.
- A funding allocation of £150,000 has been provided by the Scottish Government to VisitScotland in 2011 to support tourism businesses undertake marketing projects to:
- Increase awareness among potential visitors of Scotland as an active tourism destination
- Increase awareness of the opportunities in Scotland to participate in outdoor activities - i.e. walking, fishing, cycling, skiing, sailing
- Increase number of visitors to outdoor sites where physical activity is undertaken (i.e. country parks, nature reserves, mountain bike centres)
- Awards will made on a 50:50 match funding basis; minimum £2,500 (total marketing project £5,000) to maximum of £25,000 (total marketing project £50,000)

Scottish Rural Development Programme

The Scottish Rural Development Programme (SRDP) 2007-2013 for rural businesses throughout Scotland.

The SRDP is a programme of economic, environmental and social measures, worth some £1.5 billion, designed to develop rural Scotland from 2007 to 2013. Individuals and groups may seek support to help deliver the Government's strategic objectives in rural Scotland. A key theme/axis of the SRDP in support of rural development is 'Improving the quality of life in rural areas and diversification of the rural economy'.

There is a range of funding streams available through the SRDP; one that may be of relevance to this project is LEADER, which is discussed in more detail below. The other potential source of funding through the SRDP is Rural Priorities.

Rural Priorities

Rural Development Contracts - Rural Priorities (RDC - RP), is an integrated funding mechanism which aims to deliver targeted environmental, social and economic benefits. It is a competitive mechanism to ensure that contracts are awarded for the proposals which are best able to deliver the agreed regional priorities.

The RDC – RPs will contribute to the delivery of the Scottish Government's strategic objectives through regional priorities, agreed with stakeholders for each of the 11 regions.
A key priority of the RDC – RPs in the Scottish Borders and Dumfries and Galloway is to develop and support the diversification of Rural Enterprise Priorities. Funding for agri-tourism development may therefore be available through his funding stream.

LEADER

LEADER is part of the Scotland Rural Development Programme (SRDP). LEADER is a bottom - up method of delivering support for rural development through implementing local development strategies. Support, awarded by Local Action Groups (LAGs), is aimed at local projects with a wide community benefit that show an element of originality or experimentation where possible, and complement other activities within the local development strategy.

The aim of LEADER is to increase the capacity of local rural community and business networks to build knowledge and skills, and encourage innovation and co-operation in order to tackle local development objectives.

There are 2 LAG areas within Southern Scotland including:

- Dumfries & Galloway - £3.83 million in total through LEADER Fund
- Scottish Borders - £3.26 million in total through LEADER fund

Discussions with these LAG suggest that applications for agri-tourism developments/initiatives could be made to this funding stream, but they would need to illustrate that they benefit the community as a whole rather than have any economic advantage for an individual farmer themselves. It is therefore likely that a bid for funding would come from either a collective community group or business/consortium that wanted to promote agri-tourism as a key tourist sector or had a particular project relating to agri-tourism that would be of benefit to the wider community.

3.5 Summary

Generally, the Scottish Enterprise definition of agri-tourism is well accepted and encompasses a broad cross-section of rural activity. It is useful to consider the typology of "agri-tourism" in terms of direct, indirect and passive contact, as this not only demonstrates the breadth of potential activity in the sector but also reflects the range of attributes that the consumer is likely to demand from rural tourism.

There is, as you would expect, a range of strategies addressing priorities in relation to tourism and agriculture, from the National down to the local level. It appears that there is a synergistic relationship between the two, which is becoming more prominent as public policy makers recognise the potential benefits that developing the tourism economy can bring to wider rural economies. To support this, there are various funding options available to help support businesses who are looking to develop, or diversify. There is some concern however amongst the farming community that this funding is hard to access and involves highly complex application procedures.

There are also clear lessons and success stories from elsewhere in developing agri-tourism and the rural economy. These show the benefits of partnership, policy development, product innovation and collaborative marketing.

4 SECTOR ANALYSIS

4.1 Introduction

This section outlines the key findings in relation to the review of the current agri-tourism offer in Southern Scotland in terms of scale, location and type, means and effectiveness of presentation. This baseline audit provides us with a picture of what is in place now, and provides the basis for comparative analysis about the scale and scope of provision and the potential for growth and change.

4.2 National Supply

At the national level, the recent Scottish Enterprise study (2011) estimates between 1,100-2,400 businesses in Scotland with an association to agri-tourism. The report estimates that the direct turnover by agri-tourism businesses (excluding tourist spend) is in the range of £48m-£79m per annum and that the sector supports between 550-9,572 FTEs.

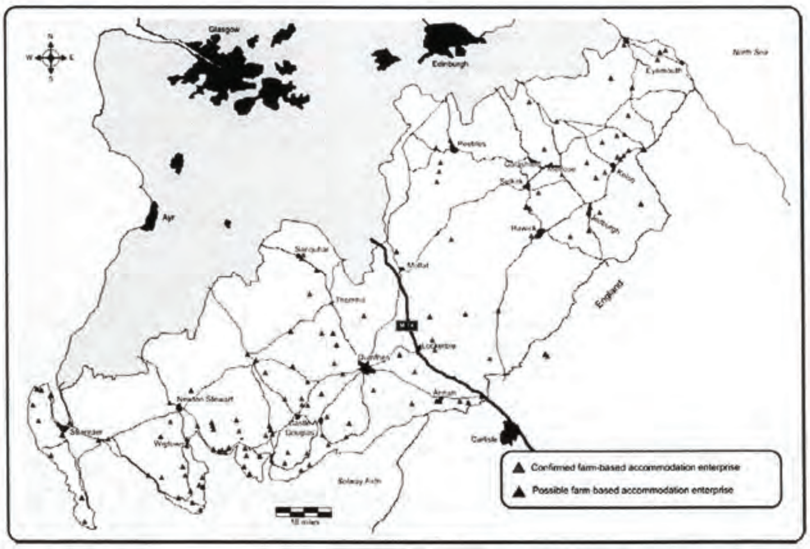
The study noted that the main issue in quantifying supply is the lack of accurate data sources on farm diversification that relates specifically to tourism activities, products and services and that fits the definition of agri-tourism activity used.

4.3 Southern Scotland

Quantifying the level of supply at the regional level is also challenging due to the disparate data sources available. The most comprehensive research to date on agri-tourism supply and characteristics has been conducted by Gillespie (2007a, 2011) through a detailed survey of farm-based accommodation providers. This research concluded:

- That there were 139 farm-based accommodation providers identified in Southern Scotland
- 73% (110) were in Dumfries and Galloway (same as in 2010 update) – 54% of these were self-catering, 31% B%B
- Clusters are evident – around the Machars peninsula, south of Newton Stewart, the coastal fringes south East of Newton Stewart and around Castle Douglas, the Kelso area of the Scottish borders and around Peebles in the north

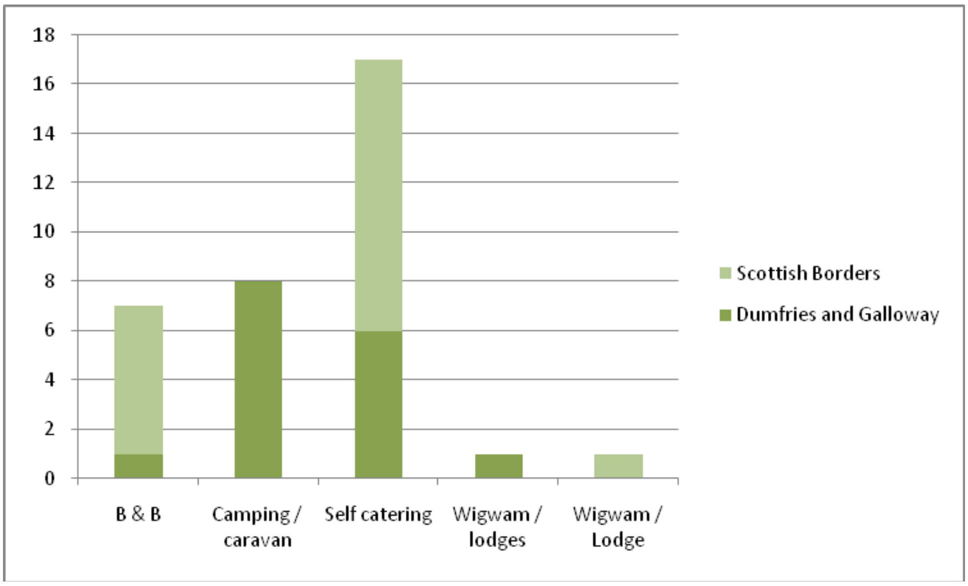
Figure 2 - Farm Tourism Providers in Southern Scotland



Source: Gillespie (2007b)

Other data sources are available, such as website Farm Stay UK which lists 8 Farm based accommodation providers in D&G, and 8 in the Scottish Borders. Other websites such as Visit Scotland, Welcome to Scotland, Back to the Borders and UK Campsite, as well as independent research highlights 45 accommodation providers in the region.

Figure 3 - Farm based accommodation in Southern Scotland



Source: PlaceFirst Research, 2011

Characteristics of Farm Accommodation in Southern Scotland

Research suggests that the ownership characteristics mirror typical small-scale rural tourism businesses. Self-catering appears to be the most common form of farm-based accommodation in both the Gillespie (2007a) research and as highlighted above. This is followed by B&B.

The average star rating in Dumfries & Galloway was 3.31; in Scottish Borders the average rating was higher at 3.5 with 64% achieving four stars.

It is worth noting that there are several high-quality, self-catering, tourism accommodation projects going forward with the support of Rural Priorities Grant Scheme which has awarded £3.0m as of April 2010 to 30 projects (average £100k per project) focusing on investment in local food processing, small scale renewable projects and tourism accommodation. These include the development of the Kilnford Barns, Dumfries into a “farm kitchen” and Kirkbride Farm, Port Logan which is developing 5* self-catering accommodation alongside other farm based experiences such as fossil-hunting, bird-watching, butterfly-spotting and local food provision.

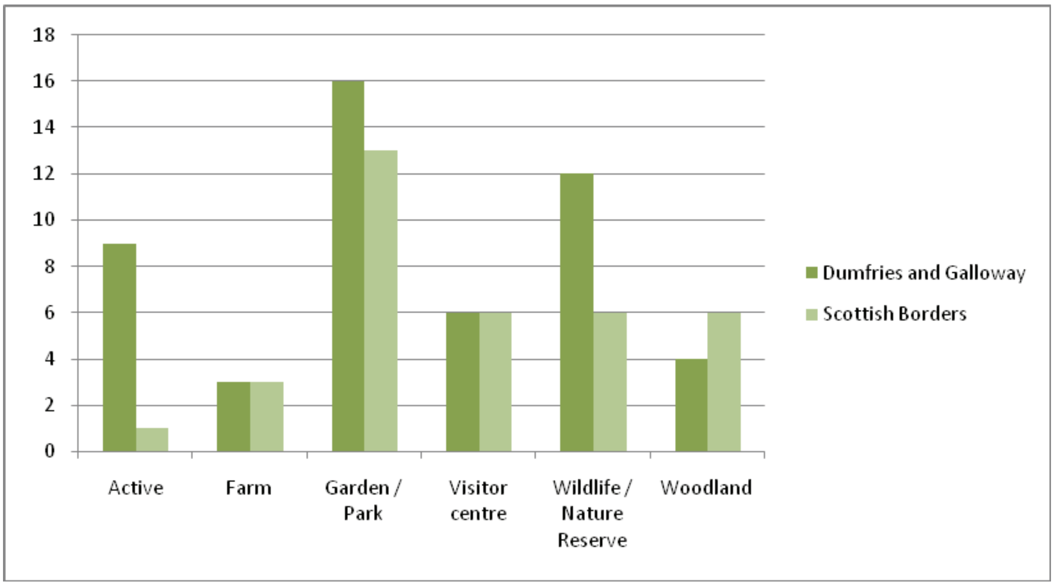
Two farms within the region (Balmangan Farm, Kirkcudbright and Williamwood Farm, Lockerbie) are also involved in the LEAF Farm Open Visits which involve opening the farm to the public to discover how farmers grow your food and look after the countryside.

Attractions

Alongside farm-based accommodation provision, there are also a range of attractions that are farm based in Southern Scotland. These form part of a much wider network of “rural” attractions that form part of an overall visitor experience. These include attractions based in woodland, wildlife and nature reserves, visitor centres in rural locations, garden and parks and active/adventure activities. In total, research suggests that there are approximately 85 attractions across Dumfries and Galloway and the Scottish Borders. In a similar way to farm-based accommodation, the majority of provision is found in Dumfries and Galloway.

There are 6 attractions listed on the visit Scotland website as “farm” based. These include for example, the multi-award winning Cream O’Galloway, Mabie Farm Park, and Dalscone Farm Fun.

Figure 4 - “Rural” based visitor attractions



Of those attractions listed as “farm” based, there appears to be a range of experiences or potential contact that tourists can experience. As shown below, these attractions appear to bridge all agri-tourism typologies and so should appeal to a range of audiences. Cream O’Galloway for example allows visitors to experience direct, indirect and passive contact with experiences through ice cream production facilities, farm tours, nature trails, indoor and outdoor pay facilities and food retail.

Table 1 - Farm attractions in Southern Scotland according to agri-tourism typology

Name	*Location*	*Description*	*Direct contact*	*Indirect contact*	*Passive contact*
Dalscone Farm Fun	Dumfries	Indoor soft play area Outdoor play attractions Farmari – contact with llamas, donkeys, goats, pigs etc			✓
Mabie Farm Park	Dumfries	Animal feeding Outdoor play attractions Indoor play attractions	✓		✓

Cream O'Galloway	Castle Douglas	Ice cream production Farm tours Nature trails Indoor and outdoor play Food retail	✓	✓	✓
Jedforest Deer and Farm Park	Jedburgh	Outdoor play attractions Indoor play attractions Tea rooms		✓	✓
Whitmuir The Organic Place	West Linton	Farm shop Restaurant		✓	
Chain Bridge Honey Farm	Chirnside	Visitor centre		✓	

Farm Shops

Research[2] suggests that there are approximately 38 farm shops located across Southern Scotland – 29 in Dumfries and Galloway and 9 in the Scottish Borders.

Events and Festivals

There are a range of events which either focus on, or link to, the countryside within both D & G and the Borders. These include, for example:

- Dumfries and Galloway Wildlife Festival – held over two weeks in April the festival includes a programme of over 90 different wildlife focused events across the local area.
- Scottish borders Walking Festival – held in September the festival features a series of organised walks across the local area.
- Wigtown Book Festival - A 10-day literary celebration in Scotland's National Book Town.
- Spring Fling - Annual celebration of the range and quality of arts and crafts in Dumfries and Galloway.

There are also specific trails that link accommodation to attractions, scenery and points of interest. These include the Galloway Red Kite Trail (wildlife), Wicker Man Trail (film), and the Southern Upland Way. Networks of food and drink trails have also been developed that link Southern Scotland with wider networks. These include:

- Scottish Farm Shops trail - Loch Arthur Creamery Shop and Craigadam Country Larder
- Scottish Cheese Trail – Ardardan Farm Shop

4.4 Farmer Perspectives

It is clear from a policy, funding and supply perspective that diversification is high on the agenda. During the course of the research meetings with farmers and landowners were held in Castle Douglas to discuss the possibility of forming a farm-tourism focused cluster group within Dumfries and Galloway. The general meeting served as a platform for discussing the issues currently facing businesses within the local area who have, or who are considering diversification as a business development opportunity.

Obstacles to Growth

[2] *Sources include buygb.com, farmshopuk.com, yell.com and independent research*

It was clear from the discussions that there was some confusion amongst businesses and individuals as to who qualified or could be labelled as an "agri/farm tourism" business. There was concern that there are many businesses out there that are rurally based and have links to agriculture, but are not necessarily a "working" farm.

This issue aside, it was evident that businesses faced a range of similar issues which needed to be overcome in order to establish a successful farm tourism business. Although farms have great opportunities in tourism, there are very real obstacles or constraints to diversification as well as threats that have, and will continue, to undermine development and growth in demand for agri-tourism. Obstacles include both those that affect the farmer and the market/visitor.

Figure 5 – Obstacles to growth facing farmers / landowners

Although each of the concerns above is valid, the main concerns expressed from the consultation with farmers are highlighted below:

Planning & Other Regulatory Controls

From discussions with farmers / those interested in diversification, there appears to be concerns over the complexity of the planning system particularly in areas where restrictions apply due to environmental designations, such as Special Protection Area (SPA) and Special Area of Conservation (SAC), or within a National Scenic Area (NSA) or Site of Special Scientific Interest (SSSI). Some farm buildings are also listed buildings of special architectural or historic interest which must not be demolished or altered in any way without the consent of the planning authority. Where planning permission is required, this can prove to be an obstacle for famers which either prevents them from developing such facilities or deters them. Meeting and keeping up with other bureaucracy and regulatory controls such as health and safety, fire regulations etc were also of concern. The cost of these controls and the requirements needed to meet standards were outlined by Farmers.

Promotion/Marketing

Discussions highlighted that many farmers that are currently involved in agri-tourism activities are unsure of how to promote and market their tourism enterprise/business. Many are unaware of the services that can help their business and those that are suggest that whilst there are a number of support organisations or promotional networks and memberships available to assist with the marketing, branding and promotion, they are unsure which to join. Many of these organisations and networks are either area or theme based, all of which may be relevant to a particular farm based business, however membership of all of these would be costly. It was also suggested that given the nature of their farming business and employment, many farmers work in isolation. Linking farm accommodation and attractions together was seen as vital to future development of the sector in Southern Scotland.

Business skills

The conversion from farm based enterprise to an enterprise that either focuses on tourism, or has tourism functions as a key part of the business requires a re-focusing of skills. Lack of tourism and hospitality training was cited as an issue by those looking to diversify, as were a general lack of broader business management skills for the completion of funding forms. . A lack of knowledge regarding market preferences and potential changes in demand was also a strong concern. Being equipped with the knowledge to allow business to react and diversify was seen as crucial to allowing business to forward plan and continue to expand.

4.5 Summary

There appears to be a good supply base in Southern Scotland. Farms have diversified and other diversifications are in the pipeline, supported, in part, by public sector funds. There may, of course be further examples in the market that have not been highlighted by this research. Data sources and information on farm/agri-tourism in the region are very disparate and there is no one source of information (or central access point from the consumer perspective) or easy method of defining farm attractions/accommodations against others. This means that from a consumer perspective it is hard to assess where the accommodation is, whether it is on a farm, or whether it is just in a rural location.

Whilst the issues facing farmers and those wishing to diversify are clearly complex and multi-faceted, discussions with farmers and other landowners suggest an appetite to diversify and overcome potential challenges. What was clear from discussions was that there was an appetite amongst those who have diversified, and those looking to diversify that there needs to be a clustering of accommodation, activities and most importantly marketing to jointly show the combined offer in the “rural” area of Southern Scotland. Most thought that collaboration, be it in the form of a cluster group, or otherwise would be a critical part of this process to foster joined-up thinking and to share experiences and good practice across farm based and/or rural enterprises in the area.

There are also a number of awarding winning farm attraction examples in the region, and some attractions that bridge all agri-tourism typologies and so should appeal to a range of audiences. Likewise, there are a number of events, festivals and trails as well as food produce networks that could be built on in the region, and form part of a wider rural brand or collaborative approach to developing the rural economy.

5 VISITOR MOTIVATIONS AND PERCEPTIONS

5.1 Introduction

This section reports on the feedback from respondents to a survey that was undertaken by Visit Scotland, in partnership with PlaceFirst and Scottish Natural Heritage.
The survey was undertaken in March 2011 and distributed by Visit Scotland to over 4,000 people registered with Visit Scotland, via an email which provided a link to the online questionnaire. The survey received 479 responses in total, which at a 95% confidence level gives us a 5% confidence interval. Therefore, we can be 95% confident that the results are either +5% at the upper margin of error, or -5% at the lower margin of error[3].

5.2 Respondent Characteristics

An analysis of the general characteristics of respondents to the questionnaire indicates:

- Females accounted for 53.7% of respondents and males 44.3%
- A larger proportion of middle aged (39.7% aged 35-54) and older people either in, or close to retirement age (53% aged 55+) compared with younger respondents (7.3% aged 16-24).
- A higher number of respondents who have had children (73%), with 63% of these respondents having children that had now left home, and thus were over 18 years old.
- The majority of respondents live in England (62%), with just over a third (34.4%) living in Scotland and a small proportion in Northern Ireland (8%), Wales (5%) and less that 2% in the rest of the UK or overseas.

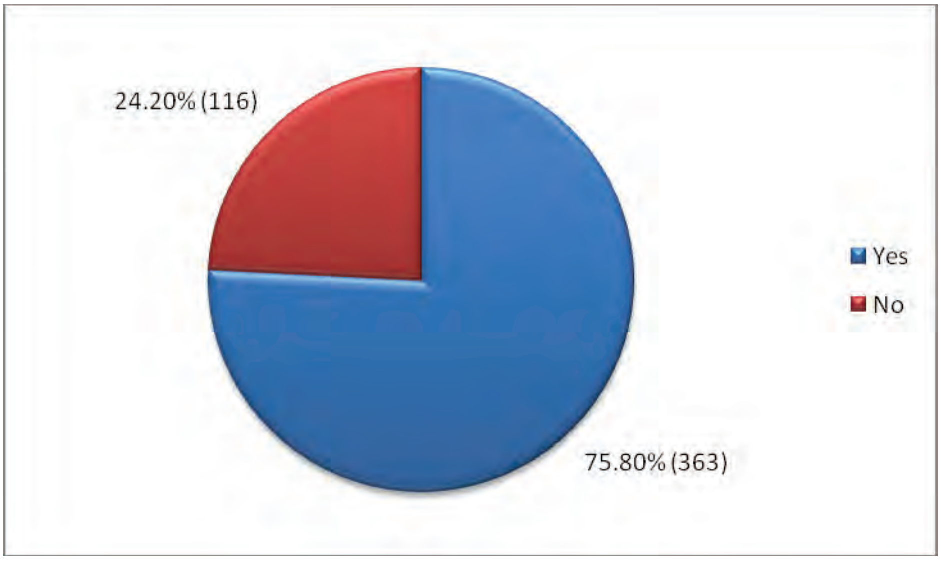
This suggests that the majority of respondents to the survey were middle aged or older, likely to be either in, or close to retirement age, with grown up children that had left home. Given many of the respondents have children that are 18+, they may also be grandparents.

5.3 Holidaying in a Rural Location

The initial question that all respondents were required to answer related to whether they had been on holiday in a rural location in the last 5 years. As shown below, this illustrates that over three quarters of respondents (75%) had been on holiday in a rural location, with just 24% suggesting they had not.

[3] This calculation takes into consideration that not every respondent will complete the questionnaire. Notwithstanding this, the confidence interval is likely to vary according to the actual number of responses received to each question.

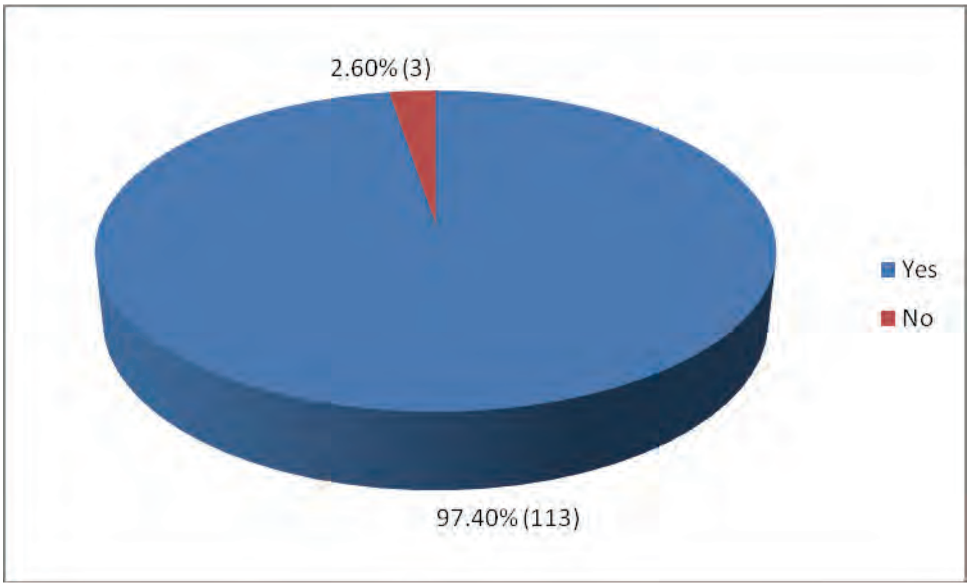
Figure 6 - Holiday in the Countryside in the Last 5 Years



Closer analysis of the results suggest that it was the more elderly residents (aged between 55+) that had the greater propensity to have visited the countryside than those middle aged and younger respondents.

The vast majority of respondents (97.4%) who suggested that they had not been on holiday in a rural location in the last 5 years suggested that they would consider going to a rural area in Scotland for a holiday in the future. Those that said they would not suggested that rural locations were too remote, or that they could not afford it.

Figure 7 - Consider Rural Holiday in Scotland

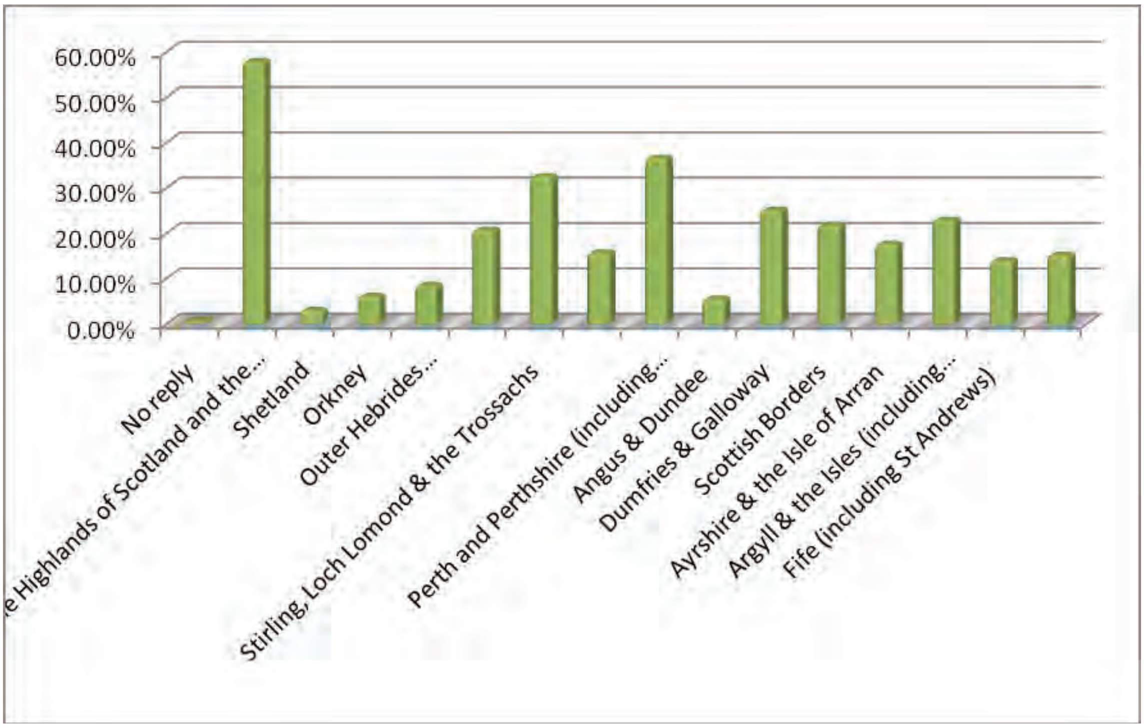


5.4 Location of Rural Holidays in Scotland

Of those who had been on holiday in a rural location in the last 5 years, the majority had visited the Highlands of Scotland and the Isle of Skye (58%), with other popular locations including Perth and Perthshire (including Pitlochry)(36.6%); Stirling (32.5%); Loch Lomond & the Trossachs; and Aberdeenshire (including Ballater/Banff/Stonehaven) (15.7%). As is likely to be the case, some of the more rural and remote rural locations such as the Shetland and Orkney Isles had been visited by fewer respondents.

A fair proportion of respondents had been to Dumfries and Galloway and the Scottish Borders (25% and 21% respectively), with the majority of these (59%-71% respectively) living within England, suggesting that these areas attract people from across the borders more so than those Scottish residents themselves. This is in direct comparison with the most popular rural destination amongst respondents, The Highlands, where the majority of respondents who had been to this location were located within Scotland. This suggests that Southern Scotland is more attractive as a rural location from residents within England, perhaps because it is one of the most accessible rural locations in Scotland. People that live in Scotland appear to prefer areas further north, which are perhaps less accessible for people travelling from England.

Figure 8 - Rural Locations Visited in Last 3 years



5.5 Motivating Factors for Rural Holiday

Respondents who had been on holiday in a rural location were asked what they found to be the motivating factors behind their previous trips. Respondent feedback is shown on the following page.

Table 2 - Motivating Factors for Rural Holiday

	Not at all	*A little - it may be something I would consider but not a primary motivator*	*A lot - essential part of a visit*
Attractive natural scenery/environment	(0.3%)	33 (9.1%)	323 (89.0%)
Somewhere good to spend time together	14 (3.9%)	72 (19.8%)	262 (72.2%)
Peace and Quiet	8 (2.2%)	124 (34.2%)	223 (61.4%)
Somewhere with lots of places to visit	16 (4.4%)	164 (45.2%)	167 (46.0%)
High quality accommodation	11 (3.0%)	162 (44.6%)	180 (49.6%)
A convenient location	50 (13.8%)	174 (47.9%)	124 (34.2%)
A new experience/discovery	27 (7.4%)	181 (49.9%)	139 (38.3%)
A place I/we can get a personal welcome	60 (16.5%)	193 (53.2%)	92 (25.3%)
Something familiar to me/us	135 (37.2%)	155 (42.7%)	59 (16.3%)
Somewhere that is of cultural/heritage interest	24 (6.6%)	183 (50.4%)	138 (38.0%)
Somewhere known for special/great food	75 (20.7%)	182 (50.1%)	91 (25.1%)
An environmentally friendly option	78 (21.5%)	212 (58.4%)	57 (15.7%)
A nostalgic experience	113 (31.1%)	176 (48.5%)	61 (16.8%)
Great beaches	123 (33.9%)	168 (46.3%)	56 (15.4%)
Lots laid on for us to do	202 (55.6%)	125 (34.4%)	18 (5.0%)
Somewhere with guaranteed good weather	230 (63.4%)	105 (28.9%)	11 (3.0%)
Lots to keep the kids occupied	276 (76.0%)	48 (13.2%)	21 (5.8%)
A physical challenge	182 (50.1%)	115 (31.7%)	48 (13.2%)

The factors that were considered to be the most essential part of a holiday to a rural location were attractive natural scenery/environment (89%), somewhere good to spend time together (72%) and peace and quiet (61%). Those that were determined to be less of a motivating factors included having lots to keep the children occupied (76%), somewhere with guaranteed good weather (63%), lots laid on to do (56%) and a physical challenge (50%). However, these ‘motivating factors’ reflect the characteristics of the majority of respondents to the questionnaire – i.e. a greater proportion of elderly residents who may prefer less physically active experiences and not have children to entertain.

5.6 Farm Holiday Experience

Respondents were asked if they had ever stayed on a farm as part of a holiday, either in Scotland or elsewhere, or if they would consider visiting a farm attraction in a rural location in Scotland.

79% of respondents who had stayed in a rural location in the past stated that they had not previously stayed on a farm in Scotland, as compared to 21% of respondents who had . 32% of the respondents who had stayed in a rural location in the past had stayed on a farm either overseas or somewhere in the rest of the UK.

5.7 Characteristics & Factors of a Farm Stay

Those who had stayed on a farm either in the UK or Scotland were given a number of statements about farm holidays and asked to rank those which they considered to be important about their last stay on a farm, with a score of 1 being not important, 2 through to 5 which would suggest that it was essential.

Similar responses were received by those who had experience of staying on a farm in Scotland as those who had stayed on a farm in the UK or overseas. The key/top factors considered by a large proportion of respondents to have been essential to their last farm trip included the rural environment, peace and quiet and access to the countryside.

Table 3 - Important Factors to Previous Stay on Farm

	Farm in Scotland	*Farm in Rest of UK/Overseas*
	Essential (5)	
Rural Environment	45.3%	42.0%
Peace and quiet	38.7%	36.4%
Access to the Countryside	61.3%	59.1%

The factors considered least important to respondents previous stay on a farm included a chance to be involved in the farm; farm shops; outdoor activities on the farm and children's activities.

Table 4 - Least Important Factors to Previous Stay on Farm

	Farm in UK	*Farm in Rest of UK/Overseas*
	Not Essential (1)	
Chance to be involved in the farm	45.3%	36.4%
Farm Shops	40.0%	30.7%
Outdoor Activities on the farm	36.0%	25.0%
Children's activities	60.0%	56.8%

5.8 Attitudes towards Farm Holidays

72% of all respondents suggested that they would consider staying on a farm as part of a holiday to a rural area in Scotland. These respondents who responded positively were then asked how far they agreed with certain factors that may encourage them to stay on a farm in Scotland in the future. The Table below outlines the responses to each factor.

Table 5 - Factors Likely to Encourage Farm Stays in Scotland

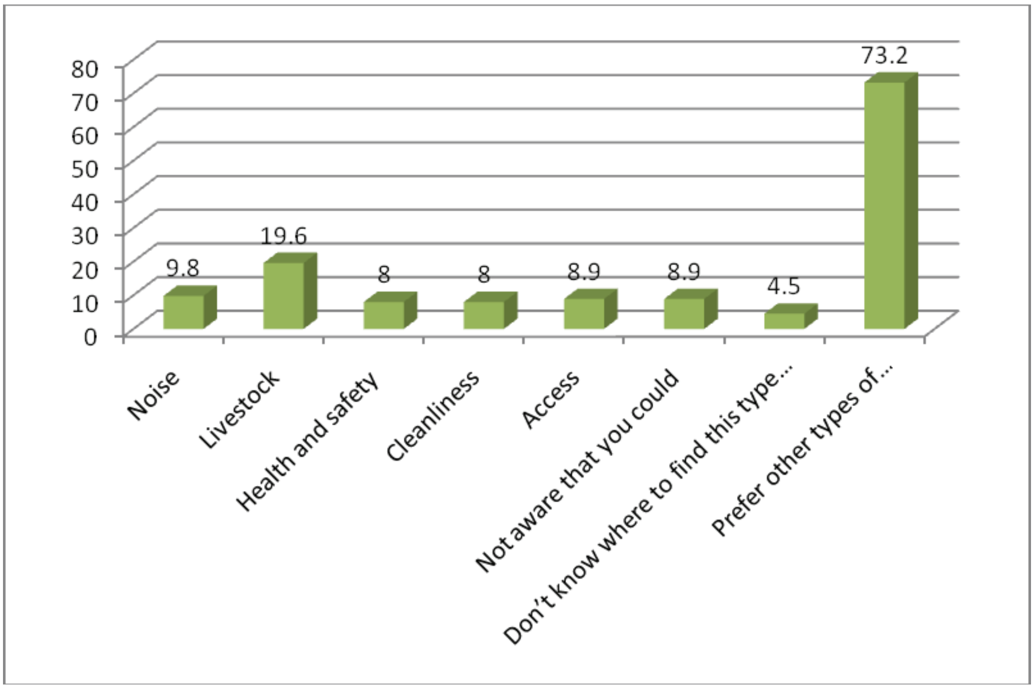
	Would not encourage me	*Likely to encourage me*	*Very likely to encourage me*
Rural cottages	14 (4.8%)	142 (49.1%)	127 (43.9%)
Personalised service	65 (22.5%)	164 (56.7%)	45 (15.6%)
Chance to be involved in the farm (e.g. helping with lambing)	145 (50.2%)	99 (34.3%)	34 (11.8%)
Outdoor activities on the farm	104 (36.0%)	131 (45.3%)	46 (15.9%)
Farm shops	58 (20.1%)	150 (51.9%)	73 (25.3%)

Local food	15 (5.2%)	124 (42.9%)	141 (48.8%)
Peace and quiet	3 (1.0%)	107 (37.0%)	173 (59.9%)
Access to the countryside	3 (1.0%)	81 (28.0%)	201 (69.6%)
Access to outdoor facilities close by	44 (15.2%)	147 (50.9%)	85 (29.4%)
Children's activities	212 (73.4%)	35 (12.1%)	30 (10.4%)
Eco-tourism	93 (32.2%)	139 (48.1%)	42 (14.5%)

It is evident that the factors most likely to encourage people to stay on a farm are those such as the availability of rural cottages (43.9%), local food (48.8%), peace and quiet (59.9%) and access to the countryside (69.9%). Key factors that would not encourage people include children's activities (73.4%), a chance to be involved on the farm (50.2%), and outdoor activities on the farm (36%). However, for the latter two factors, there were a considerable proportion of respondents who suggested that it would be 'likely' to encourage them, suggesting that people not completely against such issues as outdoor and farm activities. Again, these results could also reflect the age profile of respondents.

Those respondents that suggested that they would not consider staying on a farm in Scotland in the future were asked what they key reasons were for this position. The figure below illustrates that the main reason considered by nearly three quarters of respondents was that they preferred to stay in other types of accommodation. Another notable reason was the existence of livestock (19.5%). Only 4% suggested that it was because they didn't know where to find this type of accommodation.

Figure 9 - Reasons for Not Considering Staying on a Farm



Other open responses received included:

- A phobia of poultry
- We like to take our dogs on holiday so would be concerned about them worrying livestock
- Would consider it if it's self catering accommodation with perhaps a small enclosed private garden

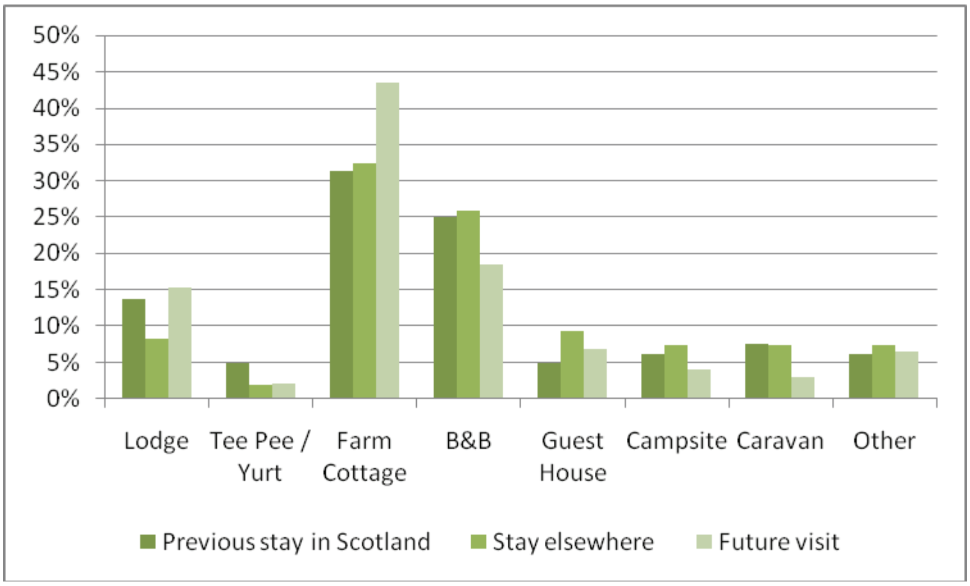
- I am a vegetarian and don't like to see livestock on farms knowing what is going to happen to them.
- My wife is disabled and a farm would be difficult
- Prefer a hotel with fine food and bar
- I prefer non-agricultural landscapes - e.g. mountains
- Prefer hotel with nightly entertainment / dancing
- No transport hence access a problem

5.9 Farm Accommodation

Of the 21% of respondents who had stayed on a farm in Scotland most had stayed in a farm cottage (33%) or a B&B on a farm (27%) . Fewer had stayed on a campsite or caravan. This again could perhaps reflect the age characteristics of respondents, who most likely being from mid to late 30's upwards may prefer cottage or B & B type of accommodation.

Responses from those had stayed on a farm elsewhere in the UK or overseas (Q9) showed similar characteristics, though slightly more people had camped, which may be due to better weather conditions abroad.

Figure 10 - Farm Accommodation



Other respondents who had not stayed on a farm before were asked what type of accommodation they would most likely look for if they were to in the future. Again, the results were similar, though more people suggested they would stay in a Farm Cottage than a B&B. More respondents also suggested that they would stay in a lodge (15% compared with 10-14% from respondents already stayed on a farm).

Open responses to this question included:

- Best Value for money option for length of stay, we chose the best quality/luxury accommodation type based upon on the cost.
- Self catering or hostel type accommodation

5.10 Farm Attractions & Activities

Of those who had not been on holiday to a rural location in the last 5 years, 59% said they would consider visiting a farm attraction as part of holiday.

The types of activities most likely to encourage people to visit a farm attraction in a rural area as part of a holiday include farm shops (35% very likely & 51.5% likely); wildlife viewing (33.8% very likely & 57.4% likely); and walking routes (27.9% very likely & 57.2% likely). Other activities such as children's activities, extreme/outdoor sports and mountain biking were considered by the majority of respondents (between 66-69%) as unlikely to encourage them to visit a farm. However, caution should be given here to these results given the overall skew of respondents to the older age categories. Closer analysis of the results indicates that a large proportion of the younger respondents that did answer this question suggested that these types of experiences would likely or very likely encourage them to visit a farm.

Those who suggested that they would consider visiting a farm in Scotland were asked to rank a range of factors that may appeal to them if they were planning a visit to a farm attraction in Scotland. Respondents were required to give a score between 1 and 5 for each, with a score of 1 being not important and 5 essential.

Table 6 - Factors That Would Encourage Farm Visits

	1 - Not important	*5 - Essential*
Eco-tourism	15 (22.1%)	2 (2.9%)
Personalised service	14 (20.6%)	4 (5.9%)
Chance to be involved in the farm (e.g. helping with lambing)	37 (54.4%)	1 (1.5%)
Outdoor activities on the farm	24 (35.3%)	1 (1.5%)
Farm shops	2 (2.9%)	7 (10.3%)
Local food	1 (1.5%)	16 (23.5%)
Peace and quiet	1 (1.5%)	14 (20.6%)
Access to the countryside	1 (1.5%)	20 (29.4%)
Access to outdoor facilities close by	5 (7.4%)	7 (10.3%)
Children's activities	43 (63.2%)	3 (4.4%)

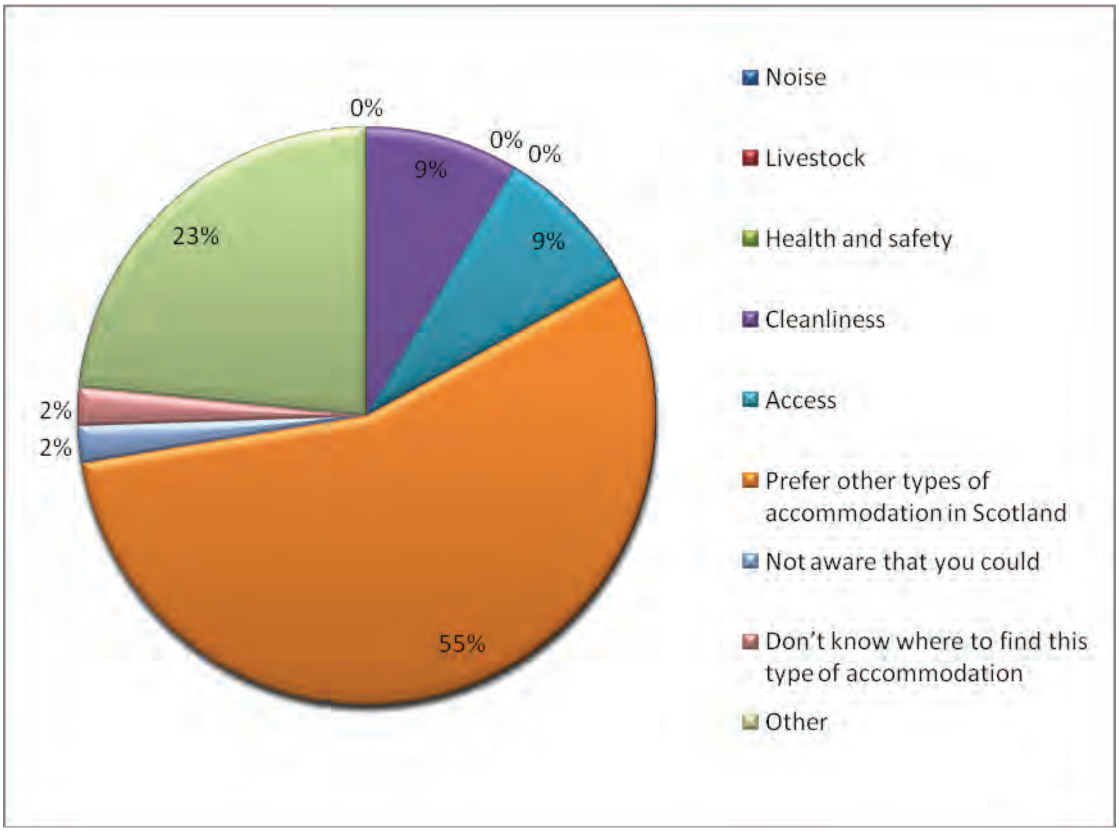
The factors considered to be the most 'essential' to respondents (who ranked them between 4 and 5) include Farm shops; local food and access to the countryside. Factors considered to be not, or less important, include children's activities, outdoor activities on the farm and opportunities to be involved in the farm.

Respondents who had never been on a rural holiday in Scotland were asked their reasons for not considering a farm attraction. As shown below, the main reason given by respondents was that they preferred other types of accommodation in Scotland (55.3%). Other key reasons included that this would involve being close to livestock (8.5%) and that they were either unaware you could stay on a farm (2.1%) or did not know where to find this type of accommodation (2.1%). 'Other' reasons accounted for just over 23% of responses and included:

- Travelling with our dogs and it's unlikely we would be allowed to take them into such attraction and I wouldn't be willing to leave them in the car while we visited without them.
- See it every day in life
- No interest
- Lack of interest
- Not an outdoor type. like restaurants and a bit of pampering

- I can visit farms in my home county of Dorset. That`s not what I want to visit in Scotland.
- Access
- Wife allergic to livestock

Figure 11 - Reasons for Not Considering Visiting a Farm Attraction



5.11 Promotion as 'Working Farm'

Respondents were asked a number of questions about their views on the promotion and appeal of 'working farms'.

The first was aimed at those respondents who had previously stayed on a farm and requested respondents to provide feedback on the importance of the classification of the farm as a 'working farm' when looking for accommodation and activities as part of a holiday on a farm.

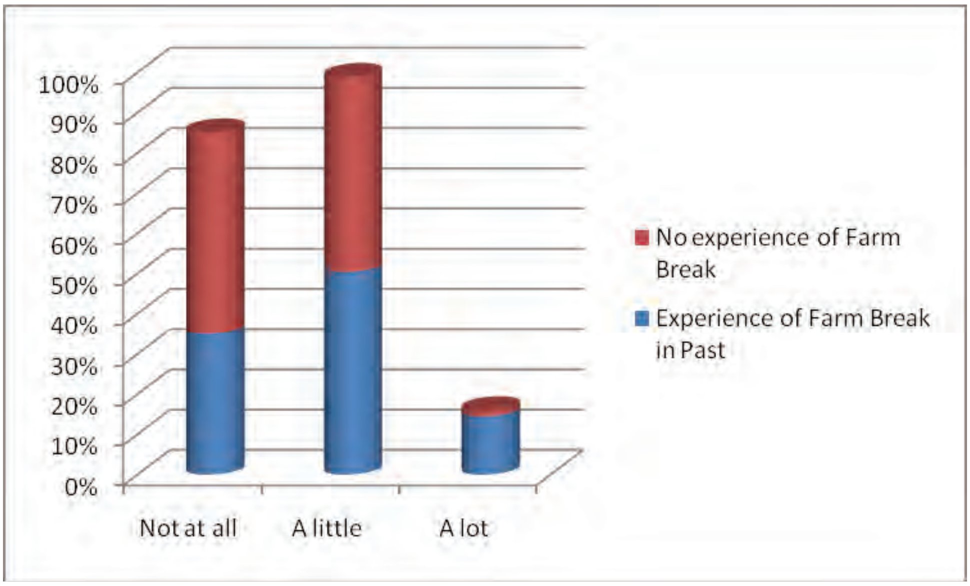
The second question was aimed at those who would consider visiting a farm, but had not already done so. This question asked respondents to what extent they though the promotion of a farm as a 'working farm' would appeal to them and encourage them to visit a farm in Scotland.

The results from both of these questions are shown below. Responses from those who had not previously stayed on a farm suggested that this promotion was not at all important (50%). However 48% found that it would be 'a little' important and just 2% 'a lot'.

The majority of people who had visited a farm suggested that it was very important (14.5%) or 'a little' important (50.4%), with 30% suggesting that it was not at all important.

This indicates that those who have experienced staying on or visiting a farm in the past found it slightly more important that a farm was promoted as 'a working farm' than those who had not.

Figure 12 - Importance of a 'Working Farm'



5.12 Sources of Information

Respondents were asked about the sources of information they would most likely use to plan a visit to a farm-based holiday in Scotland. This question was asked to two separate groups – those who had been on holiday on a rural/countryside location in the last five years, and those who had not.

Table 7 - Sources of Farm Based Holiday Information

Information Source	*Had not been on a rural holiday in Scotland*	*Had been on a rural holiday in Scotland*
Tourism agency websites (e.g. VisitScotland)	43 (63.2%)	62 (79.5%)
Travel agency	3 (4.4%)	0 (0.0%)
Independent research - web based	41 (60.3%)	64 (82.1%)
Tourism brochures	16 (23.5%)	20 (25.6%)
Travel guides	11 (16.2%)	13 (16.7%)
Travel brochures	9 (13.2%)	5 (6.4%)
Travel guide books (e.g. Lonely Planet, Rough Guide)	10 (14.7%)	8 (10.3%)
Travel Websites (e.g. Expedia)	15 (22.1%)	15 (19.2%)

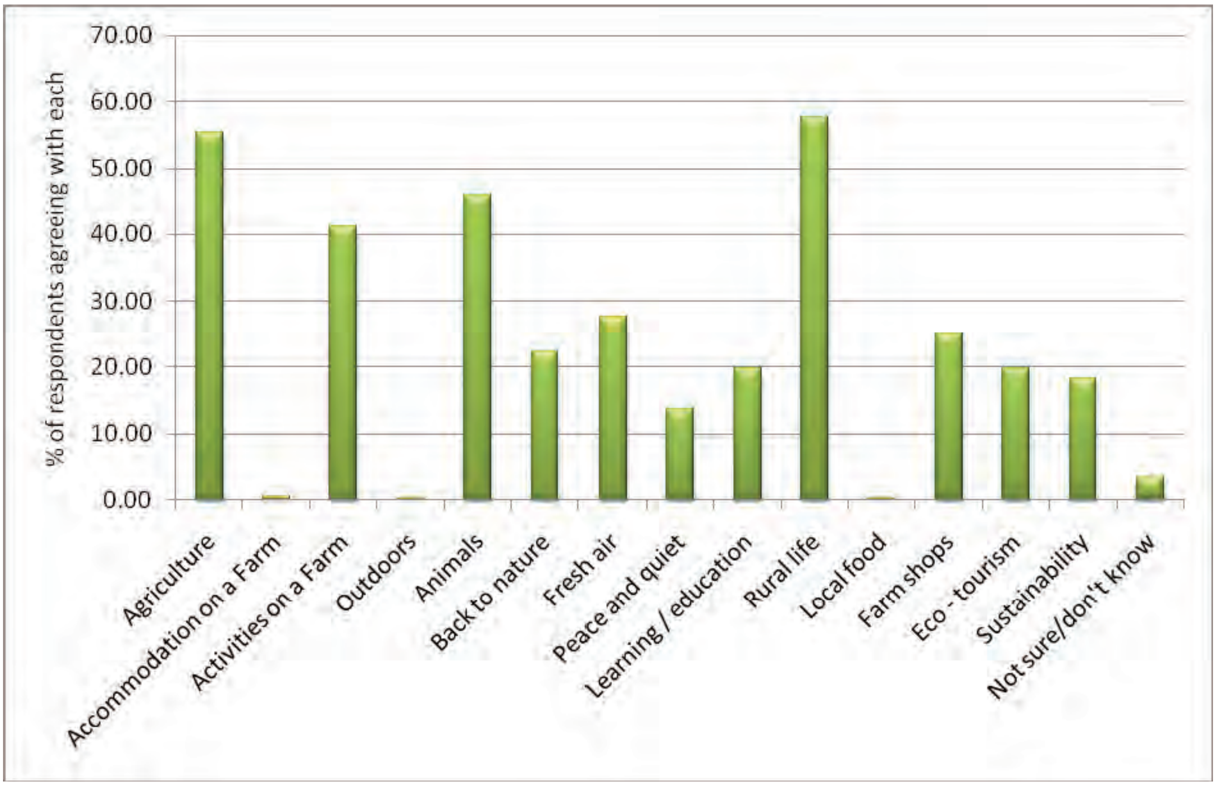
Personal recommendation from friends & family	32 (47.1%)	56 (71.8%)
Information from a tour operator e.g. package or price promotion	5 (7.4%)	1 (1.3%)
Recommendation from a travel agent	3 (4.4%)	2 (2.6%)
Information from travel/accommodation companies (e.g. cheap flights)	5 (7.4%)	6 (7.7%)
Articles in a newspaper or magazine	32 (47.1%)	29 (37.2%)
A TV or radio programme	18 (26.5%)	14 (17.9%)
Travel advisory sites (e.g. TripAdvisor)	19 (27.9%)	13 (16.7%)
Online searching (e.g. Google)	30 (44.1%)	56 (71.8%)
Social networking sites (e.g. Facebook)	3 (4.4%)	5 (6.4%)
Online travel forums	4 (5.9%)	6 (7.7%)
E-newsletters or E-alerts	8 (11.8%)	13 (16.7%)
Other	1 (1.5%)	1 (1.3%)

5.13 Farm Tourism – Definitions & Associations

All respondents were asked to highlight which words, from a list outlined in Figure 8, they most associated with the term ‘Agri-tourism’ . The most popular responses included rural life, with just under 60% of all respondents suggesting that they associate agri-tourism with this; 53% agriculture; 45% with animals and 41% with activities on a farm. Between 13-27% of respondents associated it with peace and quiet; fresh air; back to nature; learning and education; sustainability and econ-tourism. Very few people suggested that they related agri-tourism with outdoors (0.29%), accommodation on a farm (0.60%) or local food (0.29%).

This suggests that that they understood agri-tourism to be more about agriculture, rural life and perhaps activities on a farm, rather than necessarily the experience of staying on a farm. It also suggests that people also associated agri-tourism with the wider rural holiday experience.

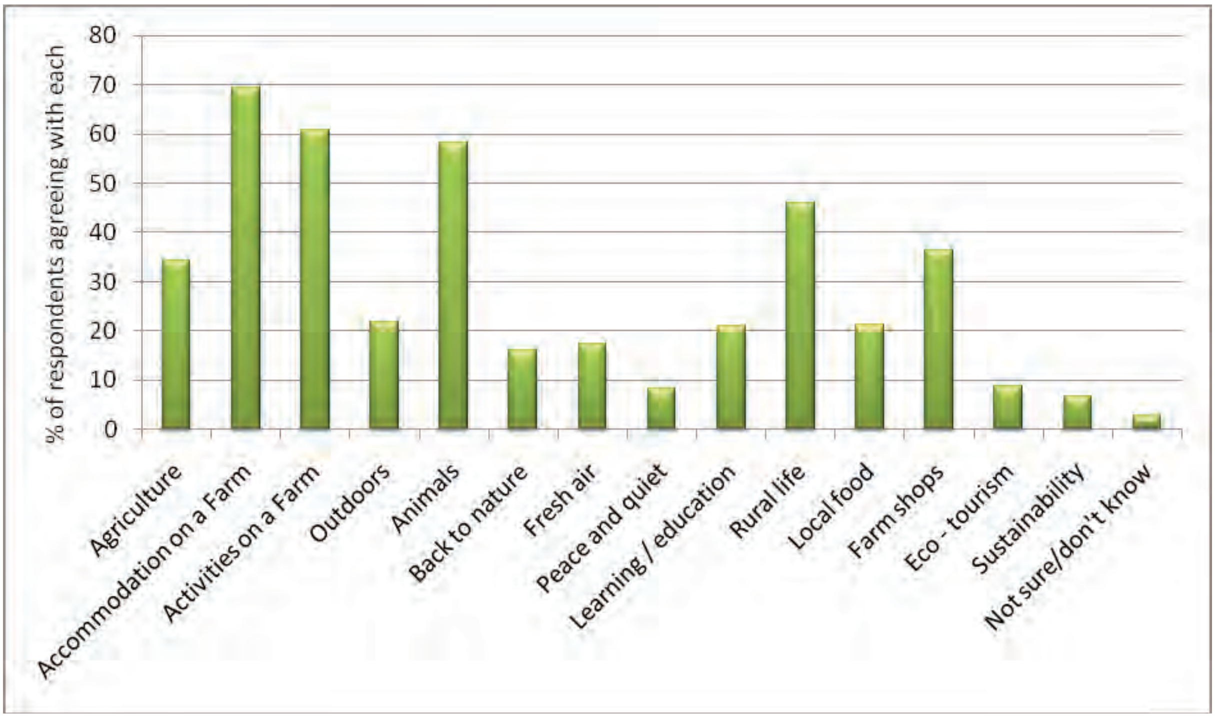
Figure 13 - Words Associated with Agri-tourism



All respondents were also asked to highlight which words, from a list outlined below, they most associated with the term ‘Farm Tourism’. The results were slightly different to those provided with reference to ‘agri-tourism’ with more people relating farm tourism directly to accommodation on a farm (69.3%) ; being outdoors (21.9%) and local food (21.4%). Whilst words such as agriculture (34.4%); activities on a farm (60.8%) and animals (58.2%) – all the words you would associate specifically with a farm – were acknowledged by a fair amount of respondents, words such as eco-tourism and sustainability were less so.

This suggests that that they understood farm tourism to be more about agricultural activities and rural life, including the experience of staying on a farm, rather than necessarily a break that offered relaxation and the enjoyment of the countryside.

Figure 14 - Words Associated with Farm Tourism



5.14 Summary

Whilst most people have been on, or would consider, a rural holiday in Scotland, a relatively small proportion of people have actually stayed on a farm. Most people looking for a rural getaway appear to be looking for peace and quiet; a rural environment and access to the countryside, which at present are not necessarily factors that are most associated with farm/agri tourism

“Working farm” appeals more to those who have previously stayed on farms than those who had not, although good proportions of both groups said it was not important. This could have implications for taking a “broader” view of accommodation that is classified as “farm” based (e.g. farm steadings).

Whilst the majority of people would consider staying on a farm in the future, the key things that are likely to attract them are rural cottages; access to farm shops; local food; peace and quiet and the access to the countryside and other facilitates. Respondents appear to be less interested in the experience of being on the farm per se, and more attracted to the opportunity to be in a rural location and the access this gives them to experience other parts of rural life.

There are clear differences between the associated meaning of agri-tourism and farm-tourism which has potentially important implications for any future brand development in the sector. More people associated “farm-tourism” with accommodation and activities although perceptions are less based on peace and quiet and back to nature which is what respondents want from a rural holiday.

6 MARKET DEMAND

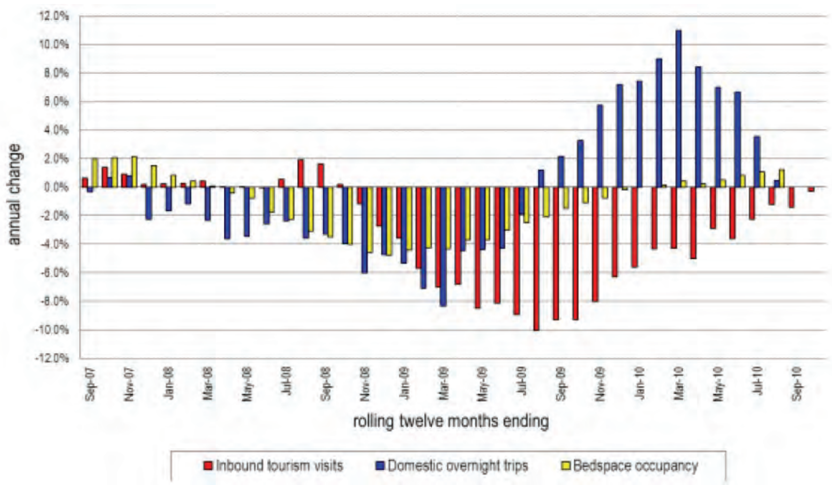
This section outlines the key findings in relation to an assessment of the potential market demand and visitor behaviour for agri-tourism experiences in Southern Scotland.

Quite simply, every successful destination has to be market-led. This is not to suggest that every destination has to be wholly populist or unchallenging, but it does demand that we have a clear understanding from the outset of its target markets: Who are they? What are their needs and preferences? What types of products and services will attract them? How is the market changing? How will different market segments interact with each other? What types of marketing messages will resonate with them? Knowing the answers to these questions will help to define a vision for the region's agri-tourism.

6.1 Headline UK Tourism Trends

Inbound visit to the UK decreased by 0.3% in 2010 but spending increase by 1.4%. Domestic overnight trips increased by 0.5% but spending has decreased by 3.7%.

Figure 15 - Headline UK Tourism Trends



Source: Visit Britain, 2010

There has been an increasing trend for "staycation" in the UK spurred in part by economic recession, higher fuel prices and changing consumer trends. Latest figures show the number of people holidaying in the UK has increased by 15% in the last year. Edinburgh, the most visited city outside London, has seen the biggest growth in the number of staycationers with an extra 133,000 visitors - many of them British.

Inbound tourism is forecast to increase by 1% to 30 million visits by 2011. Spending is forecast to increase by 2% to £17.2bn.

6.2 Tourism trends

National

In 2009, around 15 million overnight tourism trips were taken in Scotland, for which visitor expenditure totalled over £4 billion. People from within the UK account for the majority of tourism in Scotland. 39% of tourism trips are by Scottish residents. UK visitors to Scotland took 12.5 million tourism trips in 2009.

There were just over 2.5 million tourism trips from overseas visitors in 2009. The average length of a trip by our overseas visitors is around 9 nights. Trips by UK visitors tend to be shorter, on average around 3 nights for people from within Scotland and around 4 nights for people from the rest of the UK. 71% of all trips, 77% of all nights and 69% of all spend from UK visitors were from holiday makers. UK tourists spent the greatest proportion (32%) of tourism spend on accommodation, with a further 16% on eating and drinking and only 9% on entertainment.

Overseas residents accounted for around 17% of the total number of tourism trips taken in Scotland, but 33% of total visitor spend, underlining the value of attracting these visitors.

Figure 16 - Visits to Scotland by Origin, 2009

	Trips (m)	*% of total*	*Nights (m)*	*% of total*	*Spend (£m)*	*% of total*
Scotland	5.85	39%	16.59	24%	886	22%
England	6.01	40%	26.99	40%	1613	40%
Northern Island	0.42	3%	1.29	2%	176	4%
Wales	0.19	1%	1.21	2%	61	1%
Total from UK tourism	12.47	83%	46.08	68%	2,736	67%
Total from overseas tourism	2.56	17%	21.91	32%	1,359	33%
Total	15.03	100%	67.99	100%	4,096	100%

Source: Scotland - The Key Facts for Tourism in 2009. Visit Scotland

Southern Scotland

In 2009, UK tourists to Dumfries and Galloway (D&G) made around 0.75m tourist trips, staying for 2.6m nights and spending £119m. In the Scottish Borders, UK tourists made around 0.37m trips, staying for 1.2m nights and spending £80m in the area. Overseas visitors to D&G made around 0.057m trips, staying for 0.42m nights and spending £24m. Overseas visitors to the Borders made 0.04m trips, staying for 0.29m nights and spending £31m.

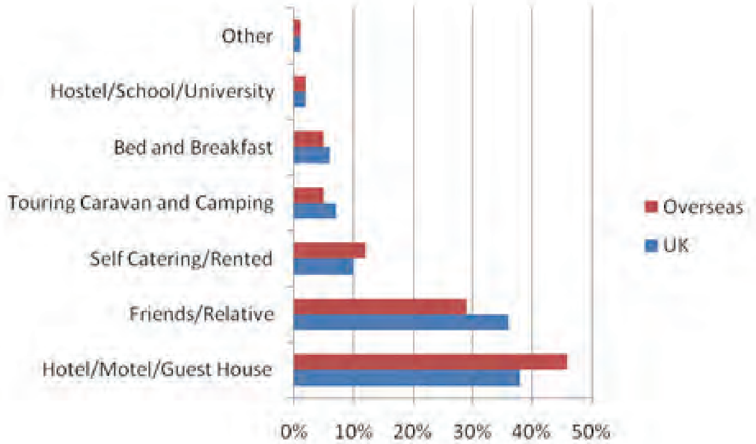
6.3 Accommodation

National

The main form of accommodation chosen by UK tourists to Scotland in 2009 was hotels and guest houses (38%). Self catering accommodation accounted for 10% of all accommodation stays; caravan and camping accounted for 7% and bed and breakfast accounted for 6% of overnight accommodation choices. Self catering accommodation and caravan and camping stays were lower than those undertaken by UK visitors.

Overseas tourists differ slightly with a higher proportion (46%) staying in hotels and guest houses and bed and breakfast accommodation (12%).

Figure 17 – Accommodation used by UK and Overseas tourist to Scotland in 2009



Source: Scotland - The Key Facts for Tourism in 2009. Visit Scotland

Southern Scotland

The most popular form of accommodation for UK visitors in D&G was camping and caravanning (40%), which was much lower in the Borders where, excluding staying with friends and relatives, hotels and Guesthouses were the most popular.

The majority of overseas visitors in D&G and in the Scottish Borders stayed with friends and relatives. However, a notable proportion of visitors to the Borders (40%) stayed in hotel/guesthouses. The domestic market (excluding locals/ day trippers) was particularly important to Dumfries & Galloway, with this group representing 45% of visitors to this area compare with an average of 25% nationally. Just 18% of visitors were from overseas and 37% locals/ day trippers.

Figure 18 - Accommodation used in Dumfries & Galloway and the Scottish Borders, 2009

Accommodation	*UK Tourist nights (m)*			*Overseas Tourist nights (m)*		
	D&G	Borders	Scotland	D&G	Borders	Scotland
Hotels & Guesthouses	16	24	27	10	40	26
Friends/Relatives	21	35	33	72	46	41
Self-catering	13	14	12	7	7	13
Camping/caravanning	40	13	16	3	1	3
B&B	5	8	4	4	3	7
Other	5	6	8	4	3	10

Source: Tourism in Southern Scotland 2009 - Dumfries & Galloway and the Scottish Borders Factsheet, Visit Scotland

6.4 Occupancy

National

Occupancy levels in Scotland have remained relatively constant over the last five years. Minor improvement to occupancy rates were seen in the Guest house and B&B sector in 2009, improving 2% on 2008 levels. Annual bed occupancy in 2009 averaged at 39% annually and room occupancy 48%.

Figure 19 – Annual occupancy rates for Scotland

	2002	2003	2004	2005	2006	2007	2008	2009
Hotel rooms	60%	61%	61%	63%	63%	65%	64%	64%
Guest House and Bed & Breakfast rooms	44%	45%	46%	47%	46%	47%	46%	48%
Self Catering units	51%	53%	52%	55%	55%	54%	52%	52%
Caravan and camping pitches	32%	34%	36%	40%	45%	46%	45%	45%

Source: VisitScotland - Scottish Accommodation Occupancy Survey

There have been the most improvement to occupancy levels in rural locations, where bed and room occupancy has risen by between 4-5% over the last year. Guest Houses and B&B's in country/village locations have also increased, with levels in 2009 up by 3% from 33% in 2008 to 36% in 2009.

Other points to note are:

- Self-catering - unlike the Guest house and B&B sector, occupancy rates remained the same as those recorded in 2008 and -2% down on 2007.
- Guest House & B&Bs – the sector has performed better in 2009 relative to other accommodation sectors with occupancy rates up on average by 2% for both bed and room occupancy.
- Camping and Caravanning - The occupancy rate in 2009 stayed the same as that recorded in 2008 at 45%. In 2008 sites in central and Southern Scotland recorded higher than average seasonal pitch occupancy rates, however, in 2009 the trend appeared to have been reversed with Southern Scotland recording rates 2% lower and the Highlands reporting increased occupancy rates.

Southern Scotland

Bed and room occupancy levels in the Scottish Borders and Dumfries and Galloway were slightly lower than national averages at between 30-32% and 35-43% respectively in 2009. The average length of stay was also slightly lower, at between 1.7 and 1.8 nights compared with other areas. Some other notable highlights were:

- 4 star graded establishments recorded a 14% increase for bed occupancy in 2008.
- Establishments which charged between £40-49.99 tariff band recorded a 5% increase
- A trend towards shorter trips
- Bed and room occupancy levels for Guest House and B&B's in Scottish Borders and D&G are slightly lower than national averages at between 30-32% and 35-43% respectively.
- Unit occupancy rates in self-catering in the Scottish Borders were some of the highest across Scotland at 56% compared with and average of 50%. Occupancy levels in D&G were slightly lower than the national average at 40%.

Although not conclusive given the small changes in occupancy levels between 2007 and 2008, it could be that establishments in the south of Scotland have been less affected by the rise in fuel prices evident during the summer – less impact noticed in the Scottish Borders and Dumfries and Galloway for example than was the case for the more northerly regions.

6.5 Attractions and Experiences

England

Visits to both farms and visitor/heritage centres have shown significant growth in recent years and this trend continued in 2009 with visitor admissions to farms increasing by +6% in

2009 (+8% in 2008) and to visitor/heritage centres by +5%. Visits to paid admission farms increased at a rate higher than paid attractions overall. Average admission was £5.57.
Scotland

Research from the Visitor Attractions Monitor suggests that during 2009, the Scottish Visitor Attraction sector experienced an overall increase in visits of 3.5% when comparing 2009 with 2008 data. Visits to rural attractions increased by 2.8% over the same period.

The national average spend in Scotland in 2009 was £6.94. The highest average spend was recorded by free admission Industrial/Craft Workplace category at £26.26.

Southern Scotland

Dumfries and Galloway experienced an increase in visitors of 5.6% and the Scottish Borders an increase in visits of 8.8% to attractions between 2008 and 2009:

- 37% of visits to attractions in Dumfries & Galloway were locals/ day trippers and 48% in the Scottish Borders
- Place of Worship attractions experienced the greatest increase in percentage of visits at 10.2%, followed by Industrial/Craft Workplace category (9.2%)
- Country/Forest Park attractions, which dominate the sector, experienced the greatest increases in terms of actual numbers of visits when comparing 2009 with 2008

The attractions that experience the most visits in 2009 are shown below. It is interesting to note the two of the top attractions in Dumfries and Galloway are Farm attractions, and both experienced an increased in visitor numbers when comparing 2008/09. Visitors to Mabie Farm in Dumfries increased by 6.3% over the period and Cream O'Galloway in Castle Douglas saw an increase of 4.9% between 2008/9.

Figure 20 - Dumfries and Galloway – Top 10 Visitor Attractions

Attraction	2009		2008		%09/08
World Famous Old Blacksmith's Shop Centre[ii], Gretna Green	706,633		665,688		6.2
Mabie Forest, Dumfries	135,000	E	120,000	E	12.5
Dalbeattie Forest, Dalbeattie	105,000	E	105,000	E	0.0
Mabie Farm Park, Dumfries	74,596		70,201		6.3
Cream o' Galloway, Castle Douglas	71,452	E	68,132	E	4.9
Kirroughtree Visitor Centre, Newton Stewart	56,455	E	DK		
Forest of Ae, Dumfries	55,000	E	50,000	E	10.0
Threave Garden, Castle Douglas	54,769		55,706		-1.7
Clatteringshaws Visitor Centre, nr New Galloway	47,555	E	46,657	E	1.9
Glentrool Visitor Centre, Newton Stewart	41,336	E	DK		

Source: The 2009 Visitor Attraction Monitor, Moffat Centre for Travel and Tourism Business Development

Figure 21 - Scottish Borders – Top 10 Visitor Attractions

Attraction	2009		2008		%09/08
Glentress Forest, nr Peebles	263,999	E	259,888		1.6
Heart of Hawick, Hawick	176,747		166,542		6.1
Teviot Watergardens, Kelso	172,686		163,249		5.8
Melrose Abbey, Melrose	46,665		40,225		16.0
Harestanes Countryside Visitor Centre, Jedburgh	30,300	E	19,900	E	52.3
Abbotsford, Melrose	26,626		26,486		0.5
Mary Queen of Scot's Visitor Centre, Jedburgh	25,662	E	11,582		121.6
Jedburgh Castle Jail and Museum, Jedburgh	24,146		14,168		70.4
Dryburgh Abbey, St Boswells	22,562		19,840		13.7
Traquair House, Innerleithen	19,367		18,057		7.3

Source: The 2009 Visitor Attraction Monitor, Moffat Centre for Travel and Tourism Business Development

6.6 Market Perceptions

Research from Google "Ad words" highlights the degree to which words associated with agri and farm tourism have been searched for on Google (as of April 2011). The key findings are shown below. This shows that there is quite a reasonable response rate on agri and agro tourism in the UK although it appears to be a small niche. "Farm holidays" and "farm cottages" all appear to have a good hit rate, although again, are potentially only a small part of a wider tourist function. However, combining the "Farm Stay" and "Farmstay" categories highlights that 54,200 searches are made in the UK per month. Although this only provides a snap shot of the market potential (which includes the UK and Scotland), it still highlights a fairly sizeable market segment, and the potential strength of the "Farm Stay" brand.

Figure 22 – Google Ad Word response for "Farm Tourism"

Keyword	Competition	Global Monthly Searches	Local Monthly Searches
tourism in		673,000	90,500
agritourism		18,100	1,600
agro tourism		12,100	1,300
agriculture tourism		1,900	140
farm tourism		1,900	210
tourism farm		1,900	210
tourist farms		1,600	320
tourist farm		1,300	210
agricultural tourism		880	46
farming tourism		260	46
farm tourism kerala		170	< 10
farm tourism in kerala		170	< 10
kerala farm tourism		170	< 10
wind farm tourism		73	28

Go to page: 1 Show rows 50 1 - 14 of 14

NB: Local monthly searches refers to all searches carried out in the UK with computers using English as their language option (April, 2011)
Source: Google, 2011

Figure 23 – Google Ad Word response for "farm stay"

Keyword	Competition	Global Monthly Searches	Local Monthly Searches
cottages		3,350,000	2,240,000
homestay		368,000	14,800
farm farm holidays		74,000	49,500
farm stay		60,500	12,100
farmstay		60,500	9,900
farm cottages		49,500	40,500
farm and cottages		49,500	40,500
farm stays		40,500	8,100
farm holidays		33,100	27,100
holidays farm		33,100	27,100
holidays on a farm		33,100	27,100
farm holiday		33,100	22,200
holiday farm		33,100	22,200
holiday on a farm		33,100	22,200
stay uk		27,100	22,200
stay on a farm		22,200	6,600
stay farm		22,200	6,600
stay on farm		22,200	6,600
farm and stay		22,200	6,600

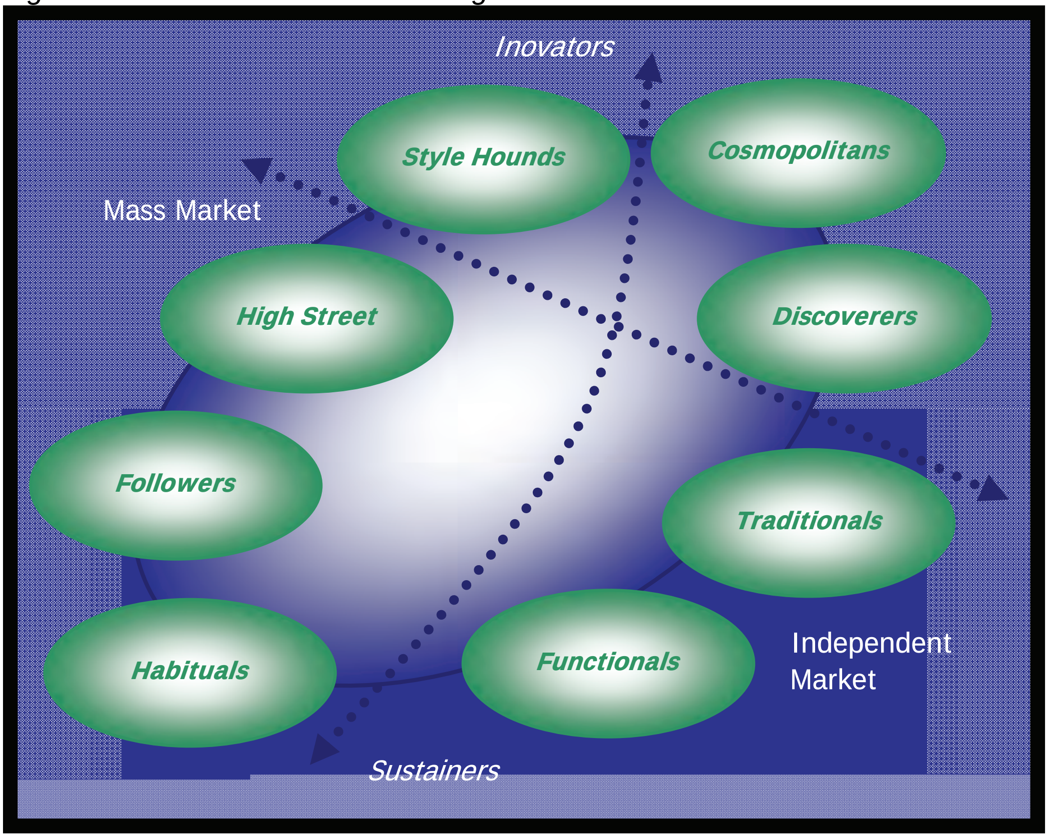
NB: Local monthly searches refers to all searches carried out in the UK with computers using English as their language option (April, 2011)
Source: Google, 2011

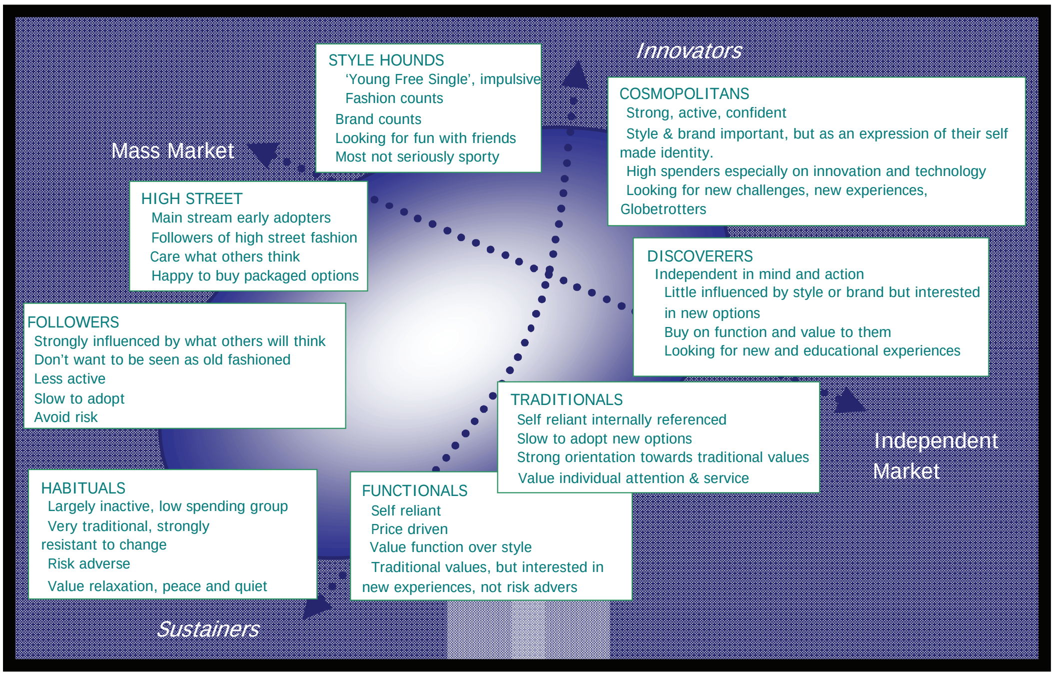
6.7 Growing the market

In very simple terms, certain types of destination attract certain types of people. To understand the type of market that Southern Scotland is likely to attract (and might potentially want to attract in the future) we have used a model called "ArkLeisure".

ArkLeisure is a customer segmentation tool that breaks visitors into a number of market segments in accordance with their spending patterns, behaviours, attitudes towards different types of experiences and of course levels of disposable income. As a tool, it helps to assess the degree of fit between the type of product that places like Southern Scotland currently offer and the type of consumer that product is likely to attract.

Figure 24 - ArkLeisure Customer Segmentation Model



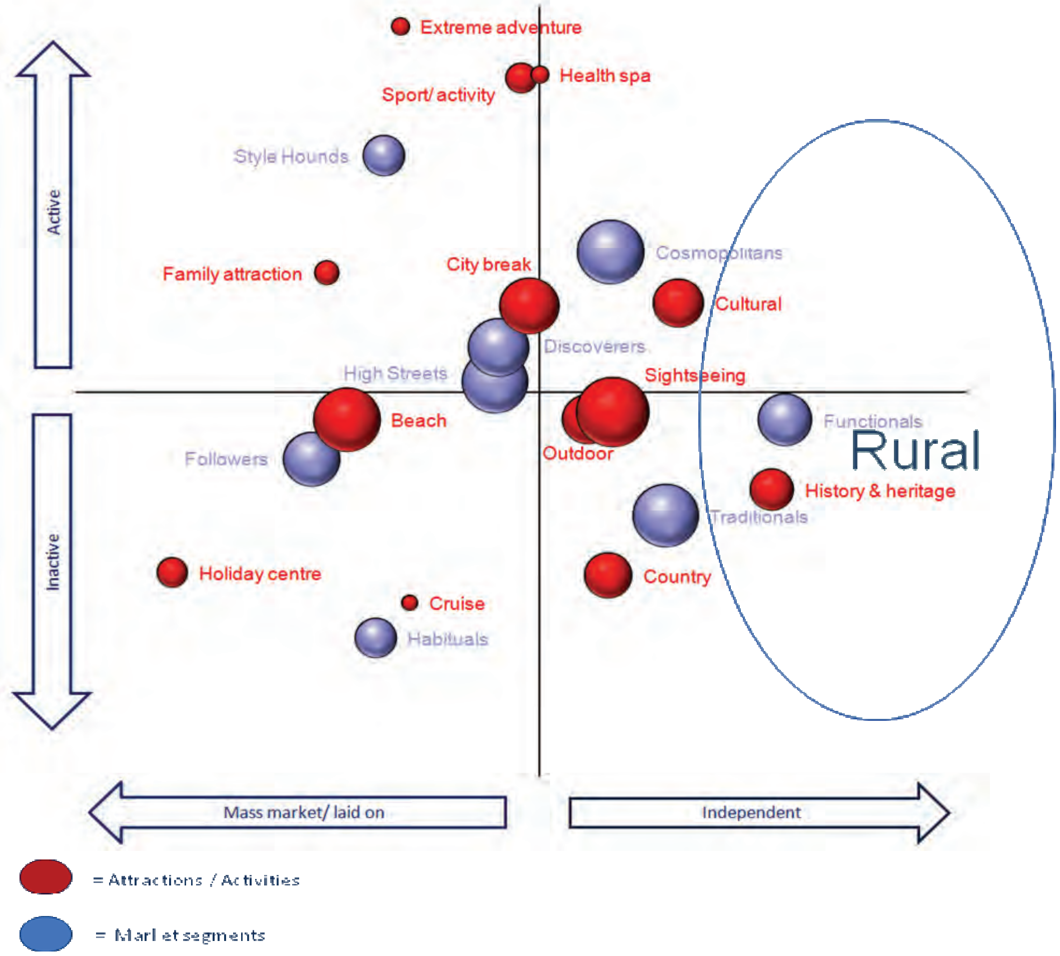


Within each market segment, customer types, socio economic profiles, consumer preferences, values and habbits vary. For example, "Style Hounds" are generally young, fashion conscious, brand aware and often higher spending. Conversely, "Followers" are generally influenced by what other think, slow to adapt to change, lower income groups.

6.8 Defining the "Rural" Holiday market

Shown below is the market map for types of holidays and corresponding market segment preferences. Rural holidays would naturally fit on the right hand side.

Figure 25 – Market Map of types of Holidays



Like all places, the offer available in southern Scotland appeals to a number of market segments and it would appear from the above that no one single segment overrides. On balance however, we can say that rural offer Southern Scotland is likely to draw most of its customer base from the following primary market segments:

- Discoverers – enjoy learning about areas and cultures, enjoy physical activity, independent, like to experience a destination from a local's perspective
- Traditionals – value good service, like rural areas, relaxed pace of life
- Functionals – independent, like to countryside for activities, 'fresh air is free'

These market groups tend to drive volume, however their tastes are far from mass market.

The secondary market segments would include:

- Cosmopolitans – active, independent, sustainable, but like lots of destination types
- Style Hounds – a physically active segment but would need laid on activities; could get bored if there is not enough to keep them occupied day and night

These groups tend to spend more per capita that the more traditional groups, although there tends to be far less of them. A coherent and high impact strategy will be one that appropriately targets both of these market segments, and treats them as equal priorities. In this way:

- Sustainable volume markets drive regular demand and create employment and sustainable business development opportunities
- Higher value markets helps to with brand building and spawns niche opportunities

6.9 Characteristics of rural holidays

Shown below are the motivations of the primary market segments in terms of the things that they look for in a rural holiday. Over 50% of the three target groups look for Scenery; Spending quality time together; Peace and Quiet; and somewhere with lots of places to visit. This research reinforces the findings from the primary research conducted as part of this study.

Figure 26 – Motivations for UK Rural holidays for primary market segments

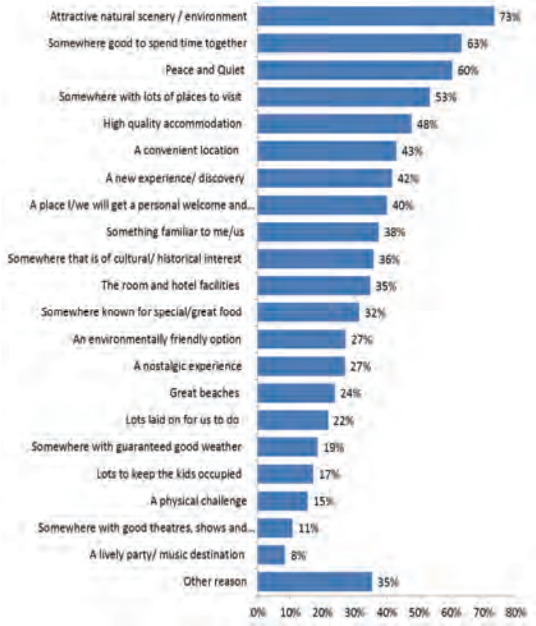
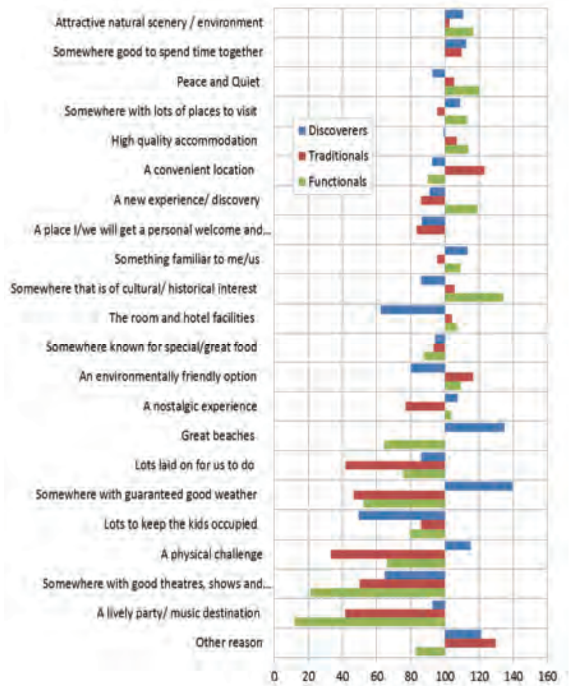


Figure 27 - Index of Motivation for primary market segments



The index of Motivation shows that there are, un-surprisingly key differences between the primary segments in terms of their preferences for rural holidays:

- Discoverers are more physically active than the Traditionals and Functionals
- Traditionals and Functionals value high quality accommodation, the room and hotel facilities more than Discoverers
- Discoverers are more motivated by good weather and great beaches than traditionals and functionals
- Traditionals want a convenient location
- None of the groups are particularly motivated by activities for children

6.10 Market volumes

Tourist economies need to establish and sustain a core market. In effect they need to be a "market maker" – seeking to generate new visits to the area, as well as attract residents and visitors regionally and nationally. As is common with other visitor destinations, the visits to

Southern Scotland will draw from two main markets, namely residents from the local area and those within a convenient travel time from the area.
This does not mean that tourists from outside the core area will not travel to southern Scotland, but simply the propensity to visit an attraction diminishes as distance from the attraction increases. In light of this, we have reviewed the resident and overnight tourism markets that will be available for Southern Scotland to target. Each market has been reviewed with regard to their size, profile and prospects for the following:

- 0 to 60 minutes drive-time from a central point in Southern Scotland ("the primary resident market")
- 60-120 minutes drive-time ("the secondary resident market")

Using CACI commissioned population breakdowns of each catchment area we can appraise the profile of the catchment area to determine the attractiveness for of the area to appeal to the resident and overnight market:

- Lifestyle factors - those factors which have been found to impact on an individual's "way of life" in terms of their habits, values, attitude and behaviour (including their leisure choices). These include income and employment levels, educational attainment, and levels of personal mobility.
- Lifecycle factors – those factors which relate to the stage people area at in their lives. There are many lifecycle factors which have been shown to influence the amount and type of leisure activities sought after and undertaken, such as age and domestic circumstances (e.g. whether single, married etc).

The following group characteristics are assessed:
- Category 1 - Wealthy Achievers
- Category 3 - Comfortably Off
- Category 4 - Moderate Means
- Category 5 - Hard Pressed

Please see appendix 1 for further information on group characteristics.

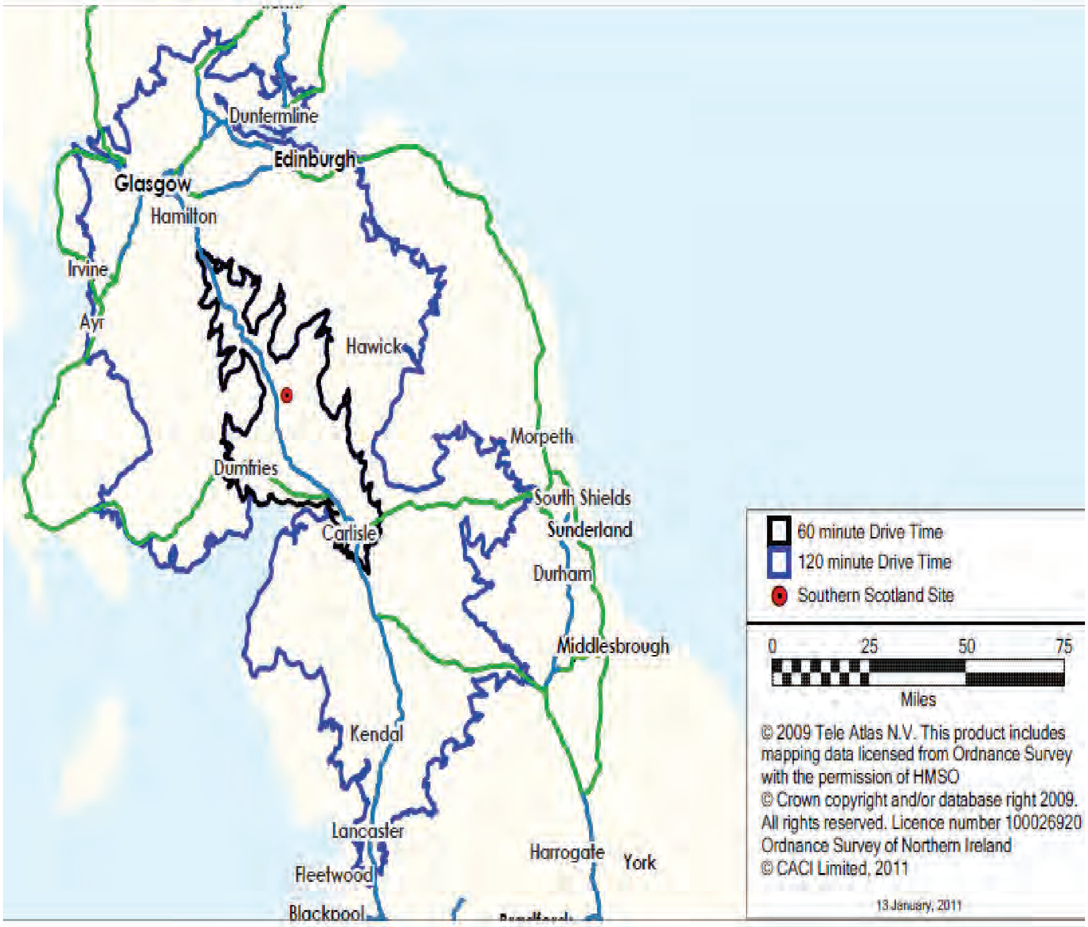
6.11 Drive time catchment areas

The total 2006 based population within the primary and secondary drive time catchments is 3.9 million. This represents around 7% of the UK's total population (of around 60 million). The primary resident market is relatively small at just under 200,000.

The secondary resident market is more substantial at 3.7 million. This area extends some distance, and includes some larger urban areas including Carlisle, Lancaster, Edinburgh and Glasgow.

Just outside of the two-hour catchment area are some other large urban areas including most of the North East of England (e.g. Middlesbrough, Durham, and Hull) and further south, Blackpool and northern parts of Lancashire.

Figure 28 –Drive time catchment from central point in southern Scotland



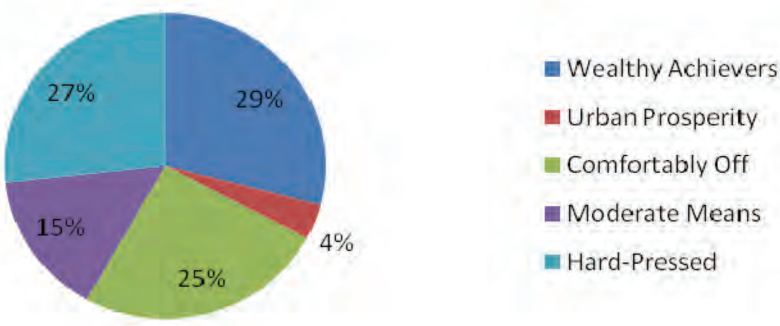
Source: CACI analysis, 2011

0-60 minute profile

Within the 0-60 minute profile, the following ACORN Categories are prevalent:

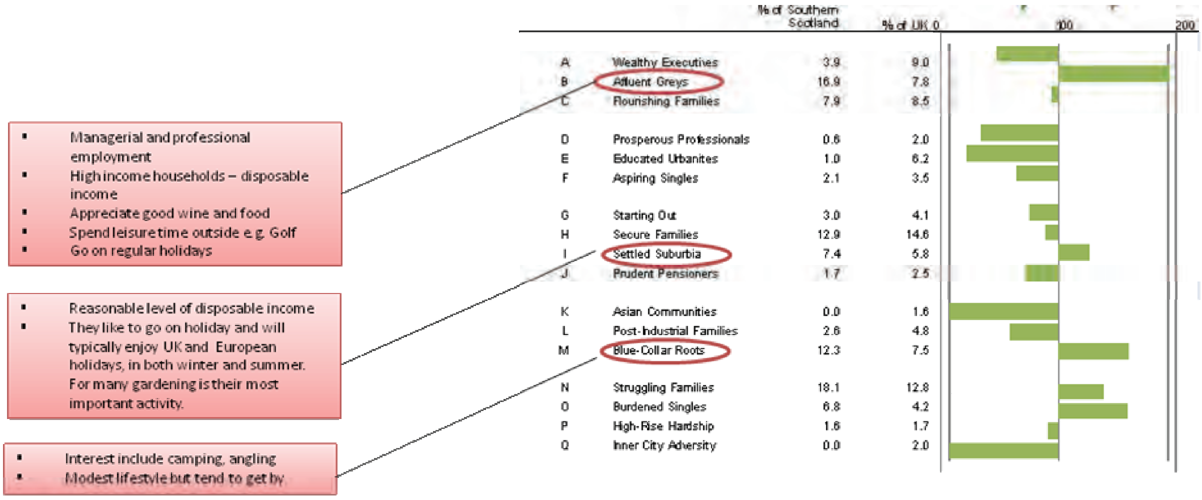
- “Wealthy achievers” largest group
- “Urban prosperity” smallest group
- Lower proportion of “Urban Prosperity” and “Moderate Means” compared to the UK average
- Higher proportion of “Wealthy Achievers” and “Comfortably Off” compared to the UK average

Figure 29 – ACORN category profile 0-60 minutes from Southern Scotland



Within the ACORN categories there are also sub-groups. Analysis of these sub-groups highlights the key characteristics of the population in the drive time catchment. Shown below are the percentages of the drive time catchment in Southern Scotland made up by each group, and the percentage compared to the UK average. This shows that there are much higher proportions of “Affluent Greys” and “Settled Suburbia” compared to UK average. This is positive for southern Scotland as both groups display the characteristics that would be interested in rural based activities and both have good levels of disposable income. However, there are less prosperous professionals. Educated urbanites and aspiring singles than nationally. These groups could potentially drive value in the market as they are typically high spending.

Figure 30 – Profile of ACORN sub-groups for the 0-60 minute drive time from Southern Scotland

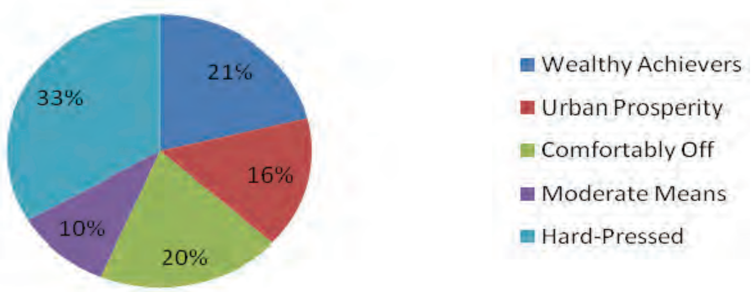


60-120 minute profile

Within the 60-120 minute profile, the following ACORN Categories are prevalent:

- “Hard-pressed” largest group
- “Moderate means” smallest group
- Lower proportion of “Moderate Means” and “Urban Prosperity” compared to the UK average
- Higher proportion of “Wealthy Achievers” , “Comfortably off”, and “Hard Pressed” compared to the UK average

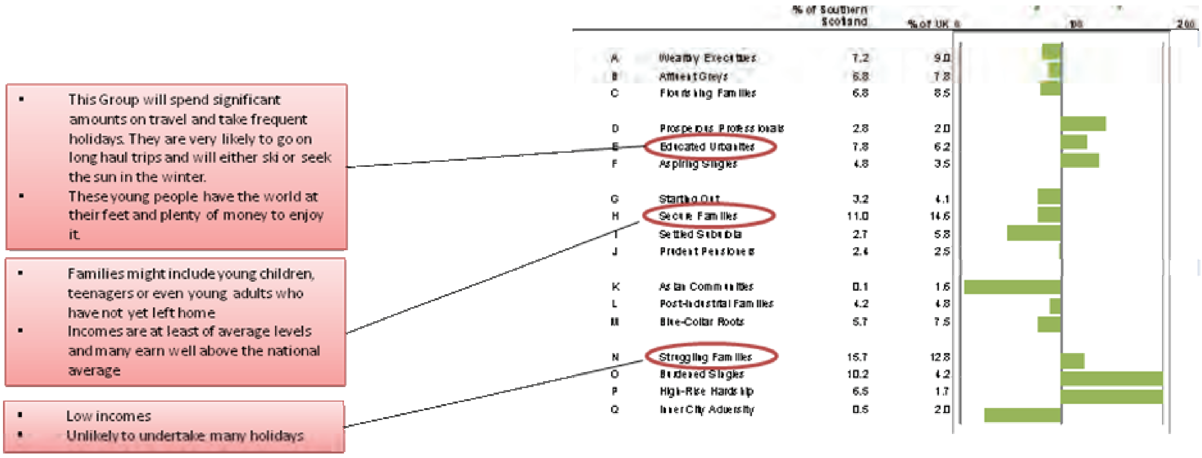
Figure 31 – ACORN category profile 0-60 minutes from Southern Scotland



Shown below are the percentages of the drive time catchment in Southern Scotland made up by each group, and the percentage compared to the UK average. This shows that there are much higher proportions of “Prosperous Professionals”, “Educated urbanites” and

"Aspiring Singles" and "Settled Suburbia" compared to UK average. Again, this is positive for Southern Scotland as both groups display the characteristics that would be interested in rural based activities and both have good levels of disposable income.

Figure 32 – Profile of ACORN sub-groups for the 60-120 minute drive time from Southern Scotland



The market analysis demonstrated how important the local "day tripper" market is to D&G and the Scottish Borders. The local market (0-60min and 60-120min) has the profile and characteristics of people that:

- Have a propensity to spend disposable income on holidays and take multiple holidays
- Spend leisure time outside
- Have interests in outdoor activities e.g. Camping

Despite a significant number of "struggling" families within the area profile, there are also good proportions of those with a greater propensity to spend on leisure activities, e.g. secure families and settled suburbia. Families are likely to be an important market alongside affluent grey. This also fits the findings of the Arkenford segmentation analysis. The population is also a good mix of ages which has the potential of attracting varied visitors with reasonable levels of disposable income.

6.12 Summary

There has been an increasing trend for "staycation" in the UK spurred in part by economic recession, higher fuel prices and changing consumer trends. This trend is also reflected in Southern Scotland where the domestic overnight tourism market is critical to the tourist economy. There also appears to be a trend towards increased visitation to attractions in Dumfries and Galloway and the Scottish Borders, and evidence of a strong local day tripper market.

Research suggests that there may be a changing profile of customer accommodation requirements whilst on holidays, with movement away from traditional hotels / B&B to self-catering / camping. This is supported by an increase in self-catering occupancy levels in rural and country/village areas which have in recent years been higher than other locations across Scotland. Visit to rural attractions in Scotland also appear to on the up. All of these aspects point towards a positive market outlook for farm based tourism and activities. This should however be views with slight caution. Evidence suggests that whilst the market actively researches "Farm stay" and "farm cottages", these terms are one part of a much wider "rural" tourist economy.

Making Southern Scotland more able to attract different market segments does not mean that the region should turn its back on its existing market. This would be highly detrimental and should be avoided. Shifting the market should instead be seen as a gradual process of expanding Southern Scotland's market for rural and farm tourism, making it more attractive, over time, to different segments and higher spending groups. This would make the market more diverse and would introduce higher spending segments and areas more likely to grow in the future.

Southern Scotland appears to have good levels of populations within its primary and secondary catchment that display the characteristics that rural tourism would appeal to. The fact that higher spending groups, younger people and a more diverse consumer mix are not represented in 0-60 minute drive time does not mean that they cannot be attracted to it. Too many destinations think that they are "stuck" with their consumer profile. They are not. They simply need to find new niches to tap into and to develop highly targeted products and services that draw in new and different profiles of visitor. Once they have these products, they need to be carefully marketed.   These things are far from easy and they carry a degree of risk (the build and they will come approach is not what we are advocating). However, if partners can work together across Southern Scotland to identify market opportunities for farm tourism in the context of the rural economy that are aligned to the areas existing competitive strengths, then opportunities will emerge.

7 PUTTING SOUTHERN SCOTLAND ON THE MAP AS A DESTINATION FOR FARM/AGRI-TOURISM

To be truly capable of putting Southern Scotland "on the map" as a destination for farm tourism and the rural tourist economy, the area needs to provide a unique destination experience. That experience should avoid imitating other places and must not be easily replicated. The beauty of the local area, farming and rural history and other landscape qualities clearly contribute strongly here. However, these are insufficient assets in their own right to drive the change that partners clearly want. Instead, the area must also become a product and brand in their own right.

What should that product look like? How might it be developed and delivered?

Case Study - Whitstable

Whitstable has become a celebrated case study in the reinvention of coastal towns. It has eschewed the standard "off the shelf" solutions and nor has it looked for salvation in the form of major new attractions. Instead, it has taken a holistic view of the local economy, recognised tourism as part of, but not the solution and focussed on projects – large and small – that would resonate as much with local residents and businesses as they would with visitors.

Central to the regeneration of Whitstable was the fact that it was cheap and close to the art schools of Canterbury and South London. Artists moved to Whitstable en masse in the 1980s and used abandoned shopfronts to exhibit their work. It did not take long for this individualistic and creative atmosphere to attract more commercially-minded investors that are always keen to associate themselves with that culture and piggyback on a developing brand. London-based antique dealers and fashion designers were drawn to Whitstable's bohemian ambience and unique, medieval street pattern. Eventually, a local entrepreneur, drawing on the town's oyster-fishing history and heritage, established a quality restaurant that attracted food writers from across the country. This "event", more than any public intervention, is often credited with kick-starting the town's regeneration and its catalytic effect would easily rival that of any major attraction.

7.1 Be different, be unique

The first step is achieving differentiation. Many consumers – be they tourists in the traditional sense, local residents, or people who live and work in town centres – are becoming wearied by the tired, box leisure solutions that are being delivered by the private sector. The long-term opportunity for places like Southern Scotland is that they can counter this trend. As a unique, unspoilt, architecturally and agriculturally rich destination, the area and its towns and villages lends itself well to the prospect of a more imaginative, more organic and more involving experience. Extracting best value from farming attractions and products, in a way that further differentiates Southern Scotland in the marketplace, should then be seen as vital in terms of contributing to wider economic development and place-making ambitions.

Destination development proposals for farm/agri tourism should strengthen the perception of Southern Scotland as an advocate of innovative thinking rather than simply a 'me too' place with minimal competitive advantage. But how should this be done? What must the area do to compete effectively?

7.2 Know your market and give it quality

The second step is recognising that ultimately, a solution will only be successful if it offers a breadth and depth of the experience to each consumer that is high quality. And, if that quality can be conveyed to a target market (ideally a niche) through a strong destination brand then its chances of success are even greater. The market is both discerning and fickle: when it comes to selling an experience, knowing your market and ensuring quality counts on every level. This research has shown that arguably the most important stakeholder, tourists, will make a decision to visit a farm not because it is a farm per se, but because it offers an experience that satisfies their and their family requirements for a day out or holiday, or as part of a wider "rural" experience. Certainly, it is folly to assume that a blockbuster visitor attraction or an empty slogan is the passport to success.

7.3 Create an experience

The next steps is to ensure that any mix of tourism – be it farm, cultural, wildlife or food based - become defined as an experience for both the visitor and local residents. Success is not about visitor accommodation, attractions and retailing per se, but about creating an environment with a range of uses form an experience that is appealing, varied and different.
When it comes to creating celebrated agri-tourism projects, success is not about the farm, its individual attractions, its retailing, its accommodation, its culture or its services as such. Success is instead achieved through the quality and authenticity of the experience offered to consumers. This is the key tenet of successful agri-tourism projects – and indeed every tourism project – and applies to individual attractions as much as it does to entire branding strategies.

Laggan Outdoor, in Galloway, for example is a successful "agri-tourism" business because it promotes an experience that is thrilling, different, physically challenging and perhaps above all great fun. The fact that it is a farm based enterprise is – as far as the consumer is concerned – largely irrelevant.

Agri-tourism is a very special opportunity for policy makers because it offers the potential to create experiences that can be unusual, engaging, educational, nostalgic, peaceful, relaxing, exhilarating, absorbing, physically challenging and or indeed most things that tourist look for when planning a day out or break as part of the wider rural environment. The key challenge for agri tourism businesses and policy makers is to ensure that they focus in on experiences that are different from the mainstream, authentic, enjoyable and therefore worth paying for. Cream O Galloway, which is another farm based business in Castle Douglas, promotes itself as simple and natural and its products – quality, natural and on site produced ice creams – and branding reflect these themes. Again, the fact that the business is farm based is part of the story and overall brand strategy, but it is more context to the visit, not the main reason for it.

Case studies

Whitstable Oyster Festival
There has been a festival in Whitstable to celebrate and give thanks for the fishing industry since the Norman times. Today, the festival attracts over 10,000 people annually and hosts a range of food, heritage and fun events. The week's festivities open on the Saturday with the ceremonial "Landing of the Oysters" at Long Beach followed by the noisy and colourful Oyster Parade. Events extend to include the Sea Sunday, and then Thursday brings another key heritage event at Reeves Beach, with the moving 'Blessing of the Waters' ceremony.

Hay-on-Wye Literary festival
Since 1988, Hay-on-Wye has been the venue for an art and literary festival which draws an estimated 80,000 visitors over a 10 day period in May/June. Once famously described by Bill Clinton as the 'the Woodstock of the mind', the festival is now sponsored by the Guardian Newspaper. As well as book-related events featuring internationally acclaimed authors, the festival includes debates, art exhibitions, live music, film previews and a children's programme.

Orvieto con Gusto
Orvieto con Gusto is an event dedicated to the culture of food and good living and is organized by the Municipality of Orvieto in collaboration with the Slow Food Association. The festival takes place over seven days between September and October and celebrates the wine and gastronomic tradition of the "Made in Italy".

7.4 Strike the right balance

Striking the right balance between a unique, high quality consumer focused offer and a vital and engaging mix of engaging activities, be it cultural, leisure, wildlife activity has become the sine qua non of the latest generation of place marketing: Yerba Buena Gardens in San Francisco, Queenstown in New Zealand and Rossendale in Lancashire to name but a few.
A strong and appealing commercial offer – consistent and sympathetic with an overarching brand – supported by an activity based programme will bring an area to life.

A bold stance towards the development of the farm tourism as part of a wider rural offer in Southern Scotland that builds on these core principles should then be adopted. The stance should be one that achieves differentiation, celebrates the setting and history of the area, but in a way that is different, exciting and integrated with other things that are well thought of and successful in the region. These could include the Red Kite Trail, Walking Festivals, Book Festivals, Food Festivals etc.

Case Study: Ulverston

A premier example of event-led activity is Ulverston. Ulverston is a small market town, with a population of 11,500, in Cumbria. Formerly an important market town, its fortunes declined with out-of-town shopping centres, together with changes in lifestyle, shopping patterns and social attitudes that created a difficult trading environment for small retailers. These issues, coupled with redundancies made by significant local employers within South Cumbria, and the difficult economic climate at the time, all added to the problems.

In 1997, Ulverston 2000+ was established – a consortium of district and parish councils, local businesses and others who were keen to improve the overall look and feel of the area and, critically, to re-brand the town. The major re-branding exercise was to be based on the development of the very strong cultural and artistic themes existing within the area, which were summarised under the banner, “Ulverston: Festival Town”. Ulverston already supported a number of festivals including the Lantern Procession and the Annual Carnival, which recently celebrated its centenary.

It was decided to build on this base of activity so that in 2002, 13 festivals and events took place. Each of these festivals addresses a different segment of the market with either a cultural or commercial ethos. The recently established Dickensian Christmas Festival is clearly the latter, while the Furness Festival of Tradition is very much the former. Another recent addition is the Word Market, which promotes local writing and literature in outreach work, culminating in a weeklong festival of literary events. Approximately 75,000 people attended/participated in the festivals in 2002 (although it is difficult to split this figure between visitors and locals).

The successful re-branding of the town has created a feel good factor among the local community which enables other arts-related projects. This renaissance of community confidence and engagement has sparked other initiatives and a willingness to accept change and move forward. Part of this desire to move forward has been the expressed desire to open a small multi-purpose arts centre. The Partnership also supported the provision of subsidised studios as part of the desire to foster an entrepreneurial culture within local arts and craftspeople. Linked to this has been the development of high quality craft galleries. These projects run in tandem with other initiatives

7.5 What to work with?

If we accept the above arguments then where might we start? What might be the focal point or drivers to development? What have we got to work with?

Southern Scotland has some fantastic assets. These include:

- Unique landscapes. These include the spectacular cliffs at Mull of Galloway or St Abbs Head and the rugged granite uplands in Galloway. The impressive tidal estuaries at Caerlaverock and Wigtown with their huge flocks of birds, or the world renowned Tweed and its tributaries.

- Wildlife. Iconic Scottish wildlife like osprey, red squirrel, red deer, mountain hare and otter are in abundance in Southern Scotland. Many attractions, events and festivals have been developed to open up the countryside and develop a strong market proposition based on wildlife tourism.
- Food and Drink. Agriculture is dominated by livestock and dairy farming in Southern Scotland. The area is building a name for itself through initiatives such as Savour the Flavours in Dumfries and Galloway which seeks to capitalize on the world class meat producers and butchers outstanding dairy products and harvests from the coastline created in Dumfries & Galloway.
- Community. The rural community in Southern Scotland is founded on the landscapes. Farming plays a major role in local communities, as does tourism and food production. The small towns and villages are centred on community
- Locational advantages. Southern Scotland is locationally well connected to a vast tourist market catchment. Although transport links across the region can in some cases be challenging, the regions location within easy reach of a number of large centres of population and in close proximity to major road networks (such as the M6) are undoubtedly advantageous in expanding the tourism market.
- Accommodation. Either on farms, or in towns, the accommodation offer available to tourists is both varied and developing. Although the quality of accommodation is thought to have been an issue in the past, new developments are underway that will undoubtedly raise the quality of the offer.
- Farm businesses. Farm tourism can contribute to the income, cash flow and profitability of a traditional agricultural business. However, in most cases it is a business in its own right and one that is entirely public facing. Each person working on the farm is likely then to have direct contact with the people who visit and stay at the farm. In doing so, they not only represent the farm, but also the industry more broadly. There is a well connected group of farm based tourism focused businesses across Southern Scotland and some outstanding successes of what can be achieved. There are also those who have engaged in consultations and communicate with public policy makers, There are however also a large majority who do not engage. It will be critical to ensure a broad cross section of the community engages to move the sector forward.

All of the above point towards strong points of differentiation that could be packaged and communicated to the market to build on assets and infrastructure and develop farm tourism products as part of a wider rural economy approach.

8 RECOMMENDATIONS

8.1 An eye on "deliverability"

It is important to point out that all of the proposals we have come up with in this section will, to a greater or lesser degree, require funding or investment.

The ability to realise the proposals will therefore be partly dependent upon the ability to attract that funding and investment. But it will also depend on the imagination of the stakeholders involved. For example, encouraging new events to visit Southern Scotland need not be at all expensive – but they will require people to organise them and to liaise with local businesses to secure small amounts of funding to cover basic costs (e.g. signage, advertising etc).

Other suggestions will need strong leadership. Organisations like VisitScotland and the sub-regional partnership will need to be regularly reminded of the wonderful opportunity that Southern Scotland is and be shown that there is a strong economic rationale for supporting the sorts of recommendations we have outlined.

Likewise there is also likely to be cross-over between priorities and activities. For example, a new initiative to market trails linked to the region's assets may require partnership working and capacity building. Similarly the investment in a new capital project to support the growth in visitor numbers at a key farm based attraction may also be linked to marketing activity. Because of this, the framework should be seen as a "matrix" of different types of activity that the region could potentially pursue in order to help maximise the economic and tourism impact of the sector.

8.2 Key Principles

The basis for future development should in our opinion be linked to specific actions that: focus on the following areas:

- The consumer - the consumer is the most important stakeholder in the tourism sector. Any future approach to growing farm tourism businesses and the wider sector must be grounded in commerciality and targeted to maximise consumer interest and demand and be built around a sustainable brand.
- Sector visibility – We believe that the farm-tourism sector is one part of the wider rural economy. To capitalise on the opportunity and cross-over that this presents, it is critical that the sector is made more visible and part of wider product development in the rural economy (e.g. walking and food networks) and in national strategy.
- Commerciality and expertise – sector development should not be reliant on purely public sector engagement. To be truly successful, and sustainable, routes need to be developed that make access to - and use of – private sector resource and expertise be it in the form of strategic land owners or other stakeholders (e.g. FarmStay UK). This said, the collaboration and organisation of public sector stakeholders is also critical to setting strategic objectives.

Shown below is a list of actions through which to take forward these principles. Addressing and implementing many of the actions will require partnership across a range of stakeholders, including SNH, the Councils, SUP and private sector partners. These partners will need to take ownership of the recommended actions and facilitate its implementation and ongoing monitoring. A discussion on ownership of the actions has begun and this will need to be continued to develop clear lines of responsibility and accountability for delivery.

8.3 Recommendation 1: Brand Building

Make farm tourism part of a powerful destination brand

It is recommended that "farm" is part of the overall "rural" tourism package in Southern Scotland. As such this concept should be fed into wider destination development ongoing by DDG, TVT and VS through a "light touch" brand development that builds on consumer requirements highlighted in this research: peace and quiet, alongside attractive natural scenery. Farms need to be a critical part of an integrated brand that pulls together all key parts of the rural experience as a key ingredient of the overall accommodation and tourism experience in the area.

The brand should focus on building on the strong "embers" that exist across the region to provide a point of differentiation. Local examples that could be leveraged/built upon include LEAF Farm Sundays Farms (Balmagan Farm in Ross Bay, Williamwood Farm in Lockerbie), Cream O'Galloway and recent development at Kilnford Barns to link farming and food to create a combined visitor experience. Aspects that could be highlighted include, "ruralness", "rural life" and "food provenance".

It may also be prudent to learn from examples from elsewhere, including for example the "Rural tourism and traditional Food" website in Norway. This shows how products can be packaged for the ease of the consumer – linking accommodation on farms and in rural areas to key visitor motivation areas including local food, access to the countryside (e.g. through walking) and other activity networks. There may be scope in the future to develop a similar website for southern Scotland promoting farm-based businesses (accommodation, attractions, retail food etc) and highlighting events and making links to wider tourist attractions including for example, walking, wildlife and nature. Such an approach would provide a central platform through which to co-ordinate all businesses involved in farm-tourism and make that information accessible and straightforward for the consumer.

8.4 Recommendation 2: Experiences

Developing and promoting a well organised and effectively delivered set of "experiences"

Discussions highlighted consensus across all key stakeholders and amongst farm based businesses that more needs to be done to join up the range of farm-based experiences on offer in Southern Scotland and cementing those experiences as part of the wider rural tourism offer.

To do this tourism agencies and private sector / cluster groups need to develop "experiences" based around the brand proposition. General discussions suggest that SUP may be interested in leading this work stream as part of a wider project group and/or that

Service Level Agreements in place between Visit Scotland and DD&G with Dumfries and Galloway Council may provide some opportunities for collaboration. Specific actions that groups could look at include:

- Developing links/networks between farms accommodations and attractions and walking, food, wildlife and activity networks to show breadth and depth of consumer experience
- Work with DDG, TVT, Visit Scotland to build on existing marketing strategies and develop new approaches around the key experiences that resonate with the market

8.5 Recommendation 3: Events

Creating a calendar of special events and activities for the farm tourism sector and link this to the wider rural economy:

There are a range of well-established events currently being run across Southern Scotland. However there appears to be little cross-over, collaboration or communication between working parties to join up these experiences for the consumer. To support wider destination development it is therefore essential that accommodation and attractions are supported by a network of accessible and attractive festivals and events across the rural tourism sector. Destination D&G are currently working to audit provision and, in conjunction with partners, are assessing supply of events across the wider sector. This is clearly a positive steps, and to this end, it is also suggested that a cross-party working group is established that focuses on:

- Supporting the process of establishing a central calendar of all events on farms (e.g. LEAF Open Farm Sundays),and link this to other events important to the rural tourism economy including: walking, food networks (e.g. Savour the Flavours, Scottish Borders Food Network), wildlife trails, other outdoor activities (e.g. 7 Staines) and wider creative industries events (e.g. Spring Fling).
- Identifying opportunities for collaboration across farm-based events and the wider rural network. Focus on developing networks and opportunities for cross-selling of farm and other accommodation, attractions, food and drink outlets to encourage additional spend in local economy
- Identify opportunities to grow the current farm-based event calendar and additional events that fit with market profile and make best use of assets in the rural economy
- Disseminate information to cluster groups and stakeholder members
- Establishing a strong calendar of events will require the key partners such as DD&G, DGC and other organisations concerned with destination development such as Visit Scotland to collaborate and exchange information across working groups.

8.6 Recommendation 4: Quality

Ensuring a framework for quality

Ensuring a high quality experience for tourists not only encourages repeat visitation, but also encourages wider destination development. Led by visit Scotland and disseminated to regional partner, there is a great deal of activity currently ongoing across the tourism industry in Scotland to improve quality. These initiatives need to be capitalised on in order to embed farm based businesses within wider quality agenda. Particular actions to take forward include:

- More visibility of “farm-stay”, attractions and events in Visit Scotland search engines – this includes the main www.visitscotland.com website, and in www.visitscottishborders.com and www.visitdumfriesandgalloway.co.uk. The current websites have information on them, but this information is often buried very deep or not visible in the general search engines.

- Ensure “Farm” and “Rural” is included in revised Digital Media Strategy / new website under development by VS.
- Destination DG to continue to audit supply as part of industry facing audit. This should include all supply that is working farm based and other search functions including “Farm steading” and rural.
- Dissemination of case studies of “exemplar” farms and/or farm steadings from within the region and from selected other case studies through steering group
- Work with cluster groups to develop networks that encourage farms based accommodation to register and share information with agency/private sector websites to help make products visible to consumers. Engagement with private sector organisations such as Scottish Farmhouse Holidays and Farmstay UK, who are collectively marketing farm-stay providers and developing brand awareness around packaged farm holidays could be critical to this. Relationships between cluster groups, wider service providers and these organisations should be developed to help foster mutual benefits and broaden the marketing and service offer of farm-based accommodation in Southern Scotland.

8.7 Recommendation 5: Stakeholder Collaboration

Public and private sector working collaboratively to develop the sector

Overarching all actions to build farm based businesses within wider destination development will require strategic and industry led leadership and collaboration. To do this we recommend a two-pronged approach that focuses on establishing better working partnerships across businesses involved in the rural tourism sector, and public and private sector engagement to oversee better co-ordination, visibility and development of the sector in the context of wider destination development. In particular this should focus on the following:

Suppliers:

- Cluster groups to be formed (led by SUP and DGC / SBC / Scottish Enterprise) that represent and provide an industry platform for collaboration, development and “collective voice” for farm tourism, those with rural/farm based accommodation and land owners (e.g. as per Scottish enterprise “Planning to Succeed” model)
- Develop private sector led action plans to help develop skills in the sector, improve business practices, develop and market current and new business opportunities
- Investigate the opportunities presented by the Visit Scotland Growth Fund and LEADER to develop initiatives based around collaboration and sector development

Stakeholders – bridge the public and private sector:

- Establish a formal steering group to help guide wider strategic development and join up local and national destination development and the rural tourism agenda.

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Appendix 1 – ACORN Group Characteristics

Category	Group	Type
Wealthy Achievers	Wealthy Executives	01 - Affluent mature professionals, large houses
		02 - Affluent working families with mortgages
		03 - Villages with wealthy commuters
		04 - Well-off managers, larger houses
	Affluent Greys	05 - Older affluent professionals
		06 - Farming communities
		07 - Old people, detached houses
		08 - Mature couples, smaller detached houses
	Flourishing Families	09 - Larger families, prosperous suburbs
		10 - Well-off working families with mortgages
		11 - Well-off managers, detached houses
		12 - Large families & houses in rural areas
Urban Prosperity	Prosperous Professionals	13 - Well-off professionals, larger houses and converted flats
		14 - Older Professionals in detached houses and apartments
	Educated Urbanites	15 - Affluent urban professionals, flats
		16 - Prosperous young professionals, flats
		17 - Young educated workers, flats
		18 - Multi-ethnic young, converted flats
		19 - Suburban privately renting professionals
	Aspiring Singles	20 - Student flats and cosmopolitan sharers
		21 - Singles & sharers, multi-ethnic areas
		22 - Low income singles, small rented flats
		23 - Student Terraces
Comfortably Off	Starting Out	24 - Young couples, flats and terraces
		25 - White collar singles/sharers, terraces
	Secure Families	26 - Younger white-collar couples with mortgages
		27 - Middle income, home owning areas
		28 - Working families with mortgages
		29 - Mature families in suburban semis
		30 - Established home owning workers

		31 - Home owning Asian family areas
	Settled Suburbia	32 - Retired home owners
		33 - Middle income, older couples
		34 - Lower income people, semis
	Prudent Pensioners	35 - Elderly singles, purpose built flats
		36 - Older people, flats
Moderate Means	Asian Communities	37 - Crowded Asian terraces
		38 - Low income Asian families
	Post Industrial Families	39 - Skilled older family terraces
		40 - Young family workers
	Blue Collar Roots	41 - Skilled workers, semis and terraces
		42 - Home owning, terraces
		43 - Older rented terraces
Hard Pressed	Struggling Families	44 - Low income larger families, semis
		45 - Older people, low income, small semis
		46 - Low income, routine jobs, unemployment
		47 - Low rise terraced estates of poorly-off workers
		48 - Low incomes, high unemployment, single parents
		49 - Large families, many children, poorly educated
	Burdened Singles	50 - Council flats, single elderly people
		51 - Council terraces, unemployment, many singles
		52 - Council flats, single parents, unemployment
	High Rise Hardship	53 - Old people in high rise flats
		54 - Singles & single parents, high rise estates
	Inner City Adversity	55 - Multi-ethnic purpose built estates
		56 - Multi-ethnic, crowded flats

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