



Stepping Stones Visitor Economy Study

An appraisal of the current and potential economic contribution of tourism to supporting farm businesses and a healthy natural environment in the Shropshire Hills Stepping Stones area.

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| | |
|---|----|
| 1. Introduction | 2 |
| 2. Volume and Value of the Visitor Economy | 3 |
| Day visits to Shropshire | 3 |
| Value of day visits to Shropshire | 3 |
| Value of tourism in the Shropshire Hills..... | 3 |
| 3. Farm tourism in the Stepping Stones area currently..... | 4 |
| Tourism and farm tourism audit..... | 4 |
| Visit Shropshire Hills members | 4 |
| Existing Farm Tourism in the Stepping Stones Area..... | 4 |
| 4. Drivers for farm tourism | 6 |
| Farm Tourism and Farm Incomes | 7 |
| Market opportunities for Farm Tourism in the Area..... | 8 |
| 5. Opportunities for the Stepping Stones area | 9 |
| 6. Summary of success factors & barriers for Farm Tourism Businesses..... | 13 |
| 7. Visitor giving explored | 16 |
| 8. Support for farm tourism..... | 18 |
| 9. Recommendations..... | 18 |
| 10. Action Plan..... | 21 |
| 11. Credits & Contacts..... | 24 |

1. Introduction

The overall Stepping Stones project aims to address the decline in wildlife, natural habitats and environmental quality within the project area by addressing the root causes and drivers of this change. The local visitor economy is almost entirely dependent on a healthy and beautiful landscape which attracts tourists and leisure visitors from all over the country. However, this economy currently fails to recognise and reward the land managers who deliver this healthy and beautiful landscape. The National Trust and its partners are keen to find ways of completing this circle.

This Visitor Economy Study aimed to explore opportunities to generate more income from the visitor economy to help maintain environmentally friendly farming and sustainable farm businesses within the Stepping Stones project area

This research involved:

- a desk study of UK and Shropshire tourism data and trends
- an audit of tourism businesses in the Stepping Stones area (see Figure 1)
- seven case studies of UK and Shropshire farm tourism enterprises
- eleven interviews with farms in the Stepping Stones area varying in size from 20 to 2,000 acres (4 with established tourism businesses, 2 with small tourism operations and developing new tourism elements, 3 starting up new tourism operations and 2 who do not currently do any tourism)
- a workshop with key organisations which work with farming and tourism businesses in the Shropshire Hills

Pilot surveys of tourism and farm businesses were also trialled in order to reach a wider number of contacts. While the emails and social media will have raised awareness of the study, response levels were not enough to enable analysis of the results.

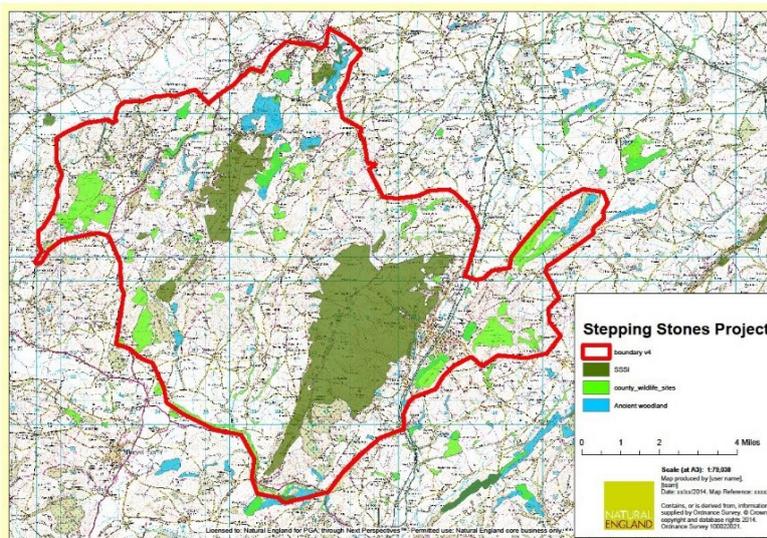


Figure 1 The Stepping Stones Area

The research considered the visitor economy of the area which was taken as leisure, recreation and tourism activities, including holiday visits and people visiting the area for less than a day. The research looked at farms, larger estates and some smaller farm holdings across the area. The leisure activities included fishing and field sports such as shooting where relevant.

2. Volume and Value of the Visitor Economy

Day visits to Shropshire¹

Between 2016 and 2018, Shropshire attracted an average of approximately 12-million day visitors per year². This places it 19th out of a list of the 20 most visited local authority areas in Great Britain. By comparison, Birmingham was the third most visited location, attracting 28.7 million visitors.

Value of day visits to Shropshire³

Visit Britain's published figures for 2018 show the West Midlands attracted 121.5 million day visitors with an expenditure of £3,829 million. Ignoring weighting, this provides an estimate of spend per head of £31.51 per person. An estimate, reducing the average spend figure by 20% to exclude higher spending in cities provides a day visitor income for Shropshire of £302 million.

Value of tourism in the Shropshire Hills

We have estimated the total income from overnight tourism (domestic and inbound) to Shropshire to be c£221 million (£39m inbound + £182m domestic).

Combining this with day visits provides a total annual figure for **all tourism** for Shropshire of c£523 million per year.

The Shropshire Hills Destination covers approximately 1/3 of the county. Visit Britain figures show the 29% of visits are to the countryside or small villages. Previous studies have estimated that southern Shropshire can claim 40% of the county's income from visitors⁴. This equates to £121 million. The Stepping Stones area, in the heart of the AONB including Church Stretton, Long Mynd and Stiperstones as popular visitor destinations, may be estimated as equating to 15-20% of that figure, between c£18.1 - £24.5 million per year.

¹ <https://www.visitbritain.org/gb-day-visits-survey-latest-results>

² Great Britain, Day visitor 2018 Annual Report https://www.visitbritain.org/sites/default/files/vb-corporate/gbdvs_2018_annual_report.pdf

³ England Domestic Tourism Day Visits Summary - All Purposes, Visit England 2018

⁴ Shropshire Hills Sustainable Tourism Strategy 2018-2023

3. Farm tourism in the Stepping Stones area currently

Tourism and farm tourism audit

The audit of tourism in the Stepping Stones area included locations on the edge of the area such as Lydham and Acton Scott. The audit found that across the area, **including** Church Stretton, there were:

| Stepping Stones area including Church Stretton | | | |
|--|--------|--------------------|------------------|
| Serviced accommodation ⁵ | 18 | Pubs | 27 ⁶ |
| Self-catering ⁷ | 90-110 | Cafés | 15 ⁸ |
| Caravanning & Camping | 17 | Attractions | 6 ⁹ |
| YHA/Bunkhouses | 3 | Activity providers | 12 ¹⁰ |
| Farm related tourism businesses | 16 | | |

Visit Shropshire Hills members

Visit Shropshire Hills has 188 accommodation providers, 43 attractions and 22 food and drink venues listed as members on its website¹¹. Of this membership, 27 accommodation providers, 8 attractions and 5 food and drink venues trade within the project area. Few of the farm businesses we spoke to, with an interest in developing tourism, were aware of how tourism is promoted locally.

Existing Farm Tourism in the Stepping Stones Area

Farm tourism businesses on working farms included 4 B&Bs, 6 holiday accommodation (possibly more than one cottage each and possibly there are more than this), 1 glamping site, 5 campsites, 1 bunkhouse and a small venue used for meetings or supporting activities such as a shoot. Two farms had more than one tourism operation. There was also one farm campsite about to open self-catering accommodation and three other farms were in the process of starting up a tourism business.

There are no farm attractions (excluding Acton Scott), farm shops, farm-based cafes or farm activity providers (other than private shooting and fishing). Farm-based B&Bs appear to have declined in recent years as evidenced by the demise of Stay on a Farm Holiday Group (also

⁵ B&Bs, guest houses or hotels (This includes one large hotel the Long Mynd now run by HF largely for group activity holidays)

⁶ 9 in and around Church Stretton

⁷ 35 entries for Air BnB for the area including both B&B type accommodation and self-catering, glamping etc.

⁸ 10 in Church Stretton

⁹ Carding Mill Valley, Bog Centre, Snailbeach Lead Mines, Acton Scott Historic Working Farm, 2 potteries, a monastery (There are also many village churches)

¹⁰ Fishing (2), cycling (2), riding (2), crafts, ballooning (if still trading), gliding, shooting, archery, venue

¹¹ www.visitshropshirehills.co.uk

known as Shropshire Gold). Some properties may now promote their accommodation through AirBnB. One interview with a long-term B&B operator suggested that farms may have dropped out as visitor expectations have risen in recent years. It is possible that the traditional model of the farmer's wife running farmhouse B&B whilst bringing up a family is no longer as common and more women are involved in on-farm operations, run their own businesses or work off the farm.

Farm-based holiday accommodation is better represented as some farms or estates have converted cottages and redundant barns into accommodation. One case study found a modest holding with three converted barn buildings making more income from the holiday lettings than their livestock business.

Self-catering is a popular business choice in the area. Some are promoted on numerous online sites such as AirBnB or Bookings.com as well as holiday company and individual websites. It is possible that more self-catering accommodation is available on working farms than this study was able to find. This sector offers a variable range of accommodation from large barns accommodating larger groups to traditional family holiday cottages, to tiny glamping pods and shepherd huts. Most accommodation is seasonal. Some businesses have good online offers with excellent websites and strong branding. With some businesses however it is difficult to identify whether they are still operational. There is a belief that self-catering accommodation is an easy option with the promotion of the property handled by a third party. There is however a shortage of dependable support services for laundry, maintenance and cleaning.

There are fewer caravan and camping sites in the Shropshire Hills than in other rural areas¹². There is a recognition by some farmers we talked to that setting up this kind of accommodation is a full-time occupation and may draw them away from farming. There is one example within the project area (Brow Farm) that is a very successful business, with family links to the local pub, B&B and high-quality self-catering accommodation.

The area is well used by Duke of Edinburgh Award Scheme organisers. Some farms accept occasional group camping bookings from D of E and scout groups but do not have facilities for more mainstream camping. There is evidence of friction from farmers and landowners not benefiting directly from D of E activities.

Church Stretton

Church Stretton is the tenth largest employment centre in Shropshire¹³. Over the last five years, the number of jobs in Church Stretton has fallen by 4.5%, or by some 100 jobs. In comparison, the number of jobs in Shropshire rose by 2.9% over the same period.

Only 65% of employment is full time. Accommodation and food services account for 11.8% of jobs. This is much higher than the national average. Arts, recreation and entertainment

¹² Visit Britain 2018

¹³ Church Stretton Market Town Profile 2017/18 <https://shropshire.gov.uk/media/9683/church-stretton.pdf>

also accounts for 10% of employment. Both figures are significantly higher than the UK and West Midlands average.

4. Drivers for farm tourism

This study has found that farms running or developing tourism or leisure related enterprises have a mixture of motivations. These include:

| | |
|--|---|
| Financial need/necessity | 1. as farm incomes decrease and the future of farm subsidies are unknown |
| Financial opportunity | 2. growth in domestic tourism 3. other successful businesses in the area, 4. grants and promotion by Defra (The Stay on a Farm Holiday Group was started by a Countryside Commission grant scheme). |
| Economic shifts and uncertainty | 5. loss of income and confidence in a sustainable standard of living |
| Quality of landscape/location/place | 6. the quality of the landscape and business' location 7. local USP such as Malcolm Saville Lone Pine series |
| Future proofing | 8. anticipated changes in the agricultural sector, alternative longer term, sustainable income needed |
| Succession planning | 9. different aspirations, skills and outlooks of next generation |
| New brooms | 10. change in attitude of new generation 11. integration of farming within a broader more diverse business model |
| Closing the gap between farm and consumer | 12. some farmers care deeply that consumers understand where food comes from, and how it's produced |
| Social benefit | 13. e.g. helping disadvantaged groups or those with health needs, who would benefit from stays on a farm in a tranquil location. |
| Collaborative opportunities | 14. Farmers may be inspired/energised by examples of other business success, locally, nationally – providing inspiration on what's possible, what works, what attracts visitors, being part of a critical mass in an area, offering supplemental services (such as temporary parking space), or working with other farms, organisations or businesses locally |
| New entrants | 15. aspiring to have stronger conservation or hospitality elements |
| Critical mass | 16. Farms adjacent to successful businesses or with passing trade |
| Personal drive | 17. strong personal and hospitality skills, which are channelled through a business they enjoy running. |

Farm Tourism and Farm Incomes

The Future Farming and Environment Evidence Compendium¹⁴ published in 2018, states that agriculture contributes less than 0.5% to the United Kingdom economy. In 2016 this was calculated as £8bn Gross Value Added (GVA).

Between 2014/5 and 2016/17 (3 years) 14% of farms made a profit of more than £75k whilst 16% of farms made a loss. The average profit for all farms was £37k for the period. This figure includes farm subsidies. Two-thirds (66%) of grazing livestock farms in less favoured areas made less than £25k/year.

'For many farmers, profit is not their main motivation and many farms are supported by off farm income.'

Farm/Tourism Business Separation

For tax and accountancy reasons, most farms we studied operate their 'tourism' business as a separate business entity. Of the farm tourism businesses, we interviewed, the proportion of the whole farm income gained from tourism operation varied. For some it was simply a source of additional income which enabled the family to enjoy a better standard of living, for others it generated 35-40% of the overall farm income and on one smaller farm the tourism business generated 75% of business income.

Comparison of tourism to other income models

In 2016/17 two-thirds of farms used farm resources to generate income from non-farming activities, making on average £17,000 profit. Just over a quarter of farms that had diversified had a greater income from the new activity than from the farm business. 6% of farms diversified into tourism accommodation and catering making an average income of £7,000. This compares to 43% of farms that let buildings for non-agricultural use gaining an average income of £17,900.

The 20% of farms that diversified into renewable energy made less income than those in tourism (solar £2,400 other renewables £3,600). However, this form of diversification may be more stable and profitable in the longer term, requiring less to maintain the level of income. Diversification into renewable energy is also less dependent on the location of the business. However, this may be restricted within protected areas. It is well documented that protected areas constitute a significant attraction for visitors.¹⁵

It is not possible to estimate how much of the visitor income spent in the area benefits the farming industry as both sectors are relatively fragmented and data is not available. Only a small proportion of tourism businesses are located on farms and as a result the synergy between the sectors will be modest. There is potential for more synergy and for more farm

¹⁴ DEFRA 2018

¹⁵ Landscapes for Life, Economic-Contribution-of-Protected-Landscapes-Final-Report-28-3-14.pdf

businesses and estates to develop tourism and leisure operations¹⁶. However, figures show that other diversification models may be more profitable.

Market opportunities for Farm Tourism in the Area

The key markets for this area are defined by Visit Britain as 'Country Loving Traditionals' and 'Free and Easy Mini Breakers'. Their methodology describes in general terms what people in these groups like, do and buy when on holiday and/or day trips. The following are common factors that will help visitors choose the Shropshire Hills and facilitate a visit:

- **Easily bookable** - the options and availability easily explained, process of choosing dates, booking extras and payment all available online with reassuring confirmation and receipts issued quickly
- **Accessible** - the number of visitor groups which include someone with disabilities, mobility problems, or young children in buggies is extremely high. Those businesses which welcome and provide good quality accessible facilities can benefit from developing a strong repeat and recommendation market in this sector
- **Environmentally friendly** - more people are concerned about climate change and want to take more sustainable holidays and 'staycations'. They will be interested to know about conservation activities on farms and be appreciative of any green design elements or processes incorporated into the tourism business
- **Sensitive to dietary requirements** - operations providing food need to consider how to cater for more varied needs including vegan, vegetarian, gluten free and allergies.
- **Individual, tailored** - people like to think they are doing something special that not many people can experience. They like to order bespoke items such as a welcome basket or meat from the farm to have while they stay. They particularly like these as 'free' added extras.
- **Shareable** - people will want to post pictures online about their experiences

Limiting factors for Shropshire Hills farms include:

- **Distance from major centres** of population – requiring visitors to drive to services (such as supermarkets)
- **The road network** - very few farms are located on busy roads, and may be difficult to find, even with sat nav. Isolated locations may be challenging for some urban visitors
- **Lack of public transport** – east west connectivity is non-existent and north south intermittent. Visitors from urban areas are used to dependable, frequent and varied public transport.
- **Lack of broadband** connectivity, poor mobile signal, limited WIFI
- **Price sensitivity** – visitors from the West Midlands may be less willing to pay what visitors from more affluent areas can afford. However, price comparisons with Cornwall and Pembrokeshire are favourable
- **Lack of footfall** – passing trade is important to farm shops, cafes and restaurants. Larger caravan and campsites make the most of retail & catering opportunities afforded by

¹⁶ See later notes on income from tourism vs other forms of diversification

having visitors on site. Many would be unable to operate without an incumbent customer base.

5. Opportunities for the Stepping Stones area

The following table outlines a few key opportunities for farm tourism development in the Stepping Stones area beyond the more common farm building conversion to self-catering model. That is not to say that there isn't a place for more authentic farm-based accommodation in the area. There is significant potential to create outstanding visitor experience by building on these baseline services and linking the business to the quality of the landscape and the experience of it.

Opportunities for the Stepping Stones area

| | | Details/comment | Examples |
|----|---|---|---|
| 1 | Activity holidays and experiences making use of the terrain | Private mountain biking linked to bike hire/ Quad biking and mountain boarding / 4x4 off road driving / electric mountain bike hire / high and low rope courses /wild swimming – farms running or providing venue/ land for private operator. Scope to link with existing activity operators such as; mountain biking events, permissive/temporary routes and parking | Llandegla Forest ¹⁷ , near Ruthin / The Edge Adventure ¹⁸ |
| 1b | Activity holidays – walking and orienteering | Walking holidays including themed, guided or tutored packages (such as mountain survival, navigation, Nordic walking, orienteering, 'wild/ / barefoot running | Church Stretton Walking Festival ¹⁹ Farafoot ²⁰ |
| 2 | 'Wilderness' and countryside skills holidays/short breaks and workshops | Bush craft, foraging, bird ID, herbalism, beekeeping, campfire cooking, weaving, knitting, green wood working | Upper Shady Moor Farm, Stiperstones ²¹ |
| 3 | Arts and crafts activities/workshops & residencies | Linked to distinctive local products – wool, heather, willow, coppice materials | Bobby Britnell ²² |
| 4 | Well-being and wellness breaks, activities and experiences | Growing trend in wellness and wellbeing, retreats, holistic and alternative medicine short breaks and away days | The Retreat Farm Broad Meadow Holistic Caravan Site ²³ |

¹⁷ <https://oneplanetadventure.com/>

¹⁸ <https://theedgeadventure.co.uk/>

¹⁹ <https://churchstrettonwalkingfestival.co.uk/walks.php>

²⁰ <https://expeditionfromthebackdoor.wordpress.com/blog/>

²¹ <https://www.featherdown.co.uk/>

²² <https://www.bobbybritnell.co.uk/>

²³ <http://www.broadmeadow.org.uk/>

| | | | |
|---|--|--|--|
| 5 | Farm-based/real farming experiences/conservation holidays | Stay on the farm holiday experiences, working or experiencing rural farm life/ practical conservation work. Wildlife identification, monitoring and wildlife friendly farming | Farmstay UK ²⁴ Wwoof ²⁵ |
| 6 | Wild and green/eco campsites, 'wilderness experience camps' | 'you just need wellies, a torch & a toothbrush' There is scope for more youth group targeted temporary sites for D of E, John Muir Trust, Scout Groups, University field study groups | Eco-escape ²⁶ |
| 7 | Large party self-catering & serviced accommodation and farm-based weddings | Fully serviced weddings, where the venue is leased or managed directly as a separate farm business | Pimhill Barn ²⁷ |
| 8 | Wet weather and indoor play experiences (farming & wildlife themed) | Targeted specifically at family visitors, providing indoor play and wet weather experiences "the outdoors – indoors" climbing walls, trampolines, climbing frames, animal feeding, farm trails | Mickey Millers ²⁸ / Keswick Climbing Wall ²⁹ |
| 9 | Event facilities | Supporting local events, working with outdoor event organisers, parking, bike washing/temporary camping/campervan overnights / BBQ | Tough Mudder ³⁰ More Dirt ³¹ |

In addition

Solo visitors Now make up 26% of UK households. Many would be particularly interested in 'experience' type products as it's easier to mix with others when involved in an activity. They appreciate discounts or at least no surcharges for solo accommodation.

²⁴ <https://www.farmstay.co.uk/Accommodation/HolidayIdeas/Feedtheanimals>

²⁵ <https://wwoof.org.uk/>

²⁶ <https://www.eco-escape.co.uk/>

²⁷ <https://www.pimhillbarn.co.uk/>

²⁸ <https://mickeymillers.com/about/>

²⁹ <https://www.keswickclimbingwall.co.uk/>

³⁰ <https://toughmudder.co.uk/>

³¹ <https://www.moredirt.com/>

Dog friendly – many of the examples make a point in stating that they are dog friendly. Dog owners will want to bring their dog(s) with them. Businesses that welcome dogs will be able to attract that larger market share.

6. Summary of success factors & barriers for Farm Tourism Businesses

The following table summarises the success factors and barriers identified through the farm interviews and case studies:

| Success Factors | Note | Examples | Barriers | Note |
|---|---|--|------------------------------|---|
| Location and timing | The right product in the right place at the right time. Proximity to visitor hotspots and passing trade. Reaction to new trends | Brow Farm D of E | Time | Farming is a full-time job; farmers need time and support to develop new ideas |
| Authenticity | Linking a green farm ethos to a green business - providing an authentic link to rural life | The Nest | Capital/Funding | Farms are not cash rich, investment may come from selling assets, grants or loans. |
| Investment | The ability to invest enough time and money, making use of opportunities, developing ideas and building partnerships | Brow Farm, Acton Scott Farm, Pollardine Farm | Administration & bureaucracy | Fear of paperwork, grant applications, reporting, commitment. Planning constraints |
| Creativity | Thinking about your business differently, seeing opportunities, responding to trends, doing something different, offering something new | Green Dragon Eco Farm | Lack of market intelligence | Limited marketing and business planning skills. Out of touch with the Visitor Economy |
| Exceeding expectations and maintaining high standards | Recognising the needs of customers and exceeding them. Being people focussed and seeking feedback | Pimhill Barn | Lack of customer skills | Unwillingness to be customer facing and respond to customer needs |

| | | | | |
|--|--|-----------------------------------|--|---|
| Recognising opportunities and taking risks | Market research, business planning and seeking from feedback. Learning from mistakes | The Retreat Farm, Pollardine Farm | Lack of vision | Not developing ideas to their full potential, looking for easier options |
| Vision | Having a clear goal/business idea. Being clear what the business is and what it's not | Pimhill Barn | Lack of confidence | Branching into a new area of working is daunting, especially without support |
| Perseverance & collaboration | Networking, working outside farming, seeking and making best use of support | Acton Scott Farm | Resistance to change | Unwillingness to work away from farming or at the expense of farm work |
| Flexibility and attitude to tourism | The ability to adapt to changing trends, tastes and fashions, such as glamping, wedding venues, AirBnB etc | | Insufficient rewards | Lack of return on time and money spent |
| Seasonality | Developing an operation that complements existing farming seasons is beneficial so that both businesses don't need peak input at the same time | Pollardine Farm | Lack of need/doing something more profitable | Successful farm tourism businesses may not see the need to develop further. This may change as subsidies are withdrawn. |
| Social media | Developing skills and supporting the use of SM to promote businesses, particularly to younger or special interest audiences. Instagram is particularly powerful with good imagery to promote niche activities. | Hopton House B&B | | |

"6% of farms diversified into tourism accommodation and catering making an average income of £7,000. This compares to 43% of farms that let buildings for non-agricultural use gaining an average income of £17,900."

7. Visitor giving explored

“The potential of visitor gifting schemes is recognised by protected landscape bodies. To date, most NPAs and the more visited AONBs have implemented or piloted a scheme seeking to raise money for conservation projects that enhance visitors’ experiences. There is a need for these schemes to be carefully designed with a light touch and cost-effective administrative structure.³²”

Visitor Giving is not a new idea in protected landscapes and there are many examples in the UK of visitor giving schemes. In 2014 the National Association of AONBs commissioned a report that investigated alternative funding models. Visitor Giving was one of many approaches explored. The report was very positive but recognised some key points.

“Visitor Giving ...It’s creative, flexible and multifaceted and can work in many ways in any destination and across a wide range of tourism businesses. Any business which has guests or customers can operate Visitor Giving³³”

The Shropshire Hills AONB has piloted two visitor giving schemes in the last three-years. They are still running. They are the Caering for Caradoc Fix the Fort Appeal and The Shropshire Hills Shuttle Bus Supporters Scheme.

Both initiatives were launched under the Shropshire Hills AONB Trust, a charitable body set up to administer the AONB Conservation Fund and raise money for conservation projects within the AONB. The Trust also runs a Friends of the Shropshire Hills Scheme with approximately 120 members.

Between the two appeals the Trust has raised in excess of £6,000 since 2017.

The following points are common to both local schemes and the findings of the review:

1. **Scale is important**, schemes run by Nurture Lakeland (e.g. Fix the Fells) in the Lake District have the benefit of a large-scale visitor economy, with high visitor numbers, and high demand for visitor services.

Comment – the Stepping Stones area does not have the scale of visitor numbers or business/attraction operators (such as the Ullswater Ferry). Projects like Fix the Fells rely on a significantly higher footfall as well as excellent connections to the larger hospitality business in the area (which is considerably larger than the Shropshire Hills). Many of these businesses are part of larger chains. That said, so far, no work has been done locally to engage businesses directly in visitor giving. The Visit Britain toolkit offers some excellent advice on how businesses at any scale can be encouraged to get involved.

2. **Cost effective, light touch administration** – the National Park Associations that contributed to the study all agreed that visitor giving schemes need to be carefully designed with a light touch and cost-effective administrative structure.

³² Maximising PL Reserves, Final Report NAAONB 2014

³³ Visit Britain Visitor Giving Toolkit

Comment – The AONB Trust and Partnership work together to administer the Friends, grants and visitor giving schemes. It is doubtful that the Trust would be able to function as effectively without the AONB Partnership support to provide administration. Experience of the Fix the Fort Appeal shows how labour intensive developing and managing schemes. It also highlights the need for start-up funding to develop resources such as promotional materials, web pages and donation boxes.

3. **Attitude to giving is good when visitors can see the value, feel connected and can contribute** - This is supported by Visit Britain's findings that 95% of visitors will 'opt in' to fund raising activities if they are given the opportunity.³⁴

Comment – Experience from the Shuttle Bus Supporters Scheme shows that people are willing to give money to appeals that are important to them.

4. **Working with event organisers** – event organisers who are using the landscape as the backdrop and attraction for their event can provide opportunities for 'opt in' giving very easily through their online booking systems. There are many examples of this working in practice, for example the South Downs Way. Working with events is also much more efficient administratively. A network of event organisers will reach many more people than an individual organisation running the scheme.

Comment - In 2019 Church Stretton Walking Festival added an opt in button to their online booking system raising money for the Fix the Fort Appeal on behalf of the Shropshire Hills AONB Trust. The scale of events is much smaller in the Stepping Stones area, but it is no less significant. A network of event organisers (including Duke of Edinburgh) could be an effective way of raising funds for conservation work in the area.

5. **Working with local producers and merchandise** - One aspect of visitor giving that has a proven track record is the provision of bespoke local food, drink, produce and merchandise. For example, Offa's Dyke Path are working with a local brewery to produce Offa's Ale. Part of the profit from each bottle sold is donated by the brewery to the National Trail³⁵.

Comment – The Stepping Stones area has a significant number of independent breweries on its doorstep. There are also many other artisan producers locally that draw their inspiration from the landscape.

6. **Car parking and road charging** -The National Trust owns the most popular car park in the area at Carding Mill Valley with a capacity of c440 vehicles. It is understood that the Trust has recently increased the cost of parking for non-members (parking is a membership benefit).

³⁴ Ibid

³⁵ <https://www.montysbrewery.co.uk/beers/bestoffa>

Comment- There maybe potential to ask members to donate a modest amount voluntarily to help support a local project. Natural England's voluntary charging system at the Knolls Car Park has raised £450 so far this year.

The potential to charge for visitors to drive up the Burway could be a way of raising funds for conservation. This would be a mandatory charge like road charging schemes suggested for the Lake District National Park. A recent paper produced on behalf of the Friends of the Lake District³⁶ highlighted that Local Authorities have the power to do this without consultation. It also recognised the ability to include exemptions for local business use.

8. Support for farm tourism

Our research found the following key points

- Many farmers work in isolation, do not network outside their community and are unaware of the wider business support available to other SMEs. There may be opportunities to develop networks and bespoke business to business support.
- Farmers tend to get their advice from their agents, rather than using other business to business networks and support such as the Marches Growth Hub. There is limited use of business advice or training opportunities.
- The sector has limited access to funding/finance, that may be available to other non-farming businesses. Support has been driven by EU funding streams that separate agriculture from other business sectors. However, there have been funds available for tourism development that have benefited some farms (LEADER for example).
- Farm businesses may need support negotiating more bureaucratic funding opportunities. Red tape has put some businesses off making applications.
- There is limited connection between farm businesses in the area and the wider tourism business network.
- Farm businesses are reluctant to take on external staff (other than farm contractors)
- Marketing and promotion skills are generally weak. Farm businesses with skills in this area easily out-perform similar farm tourism businesses.
- Other requirements such as food hygiene certification, health and safety, insurance etc are seen as barriers.
- Planning applications and advice on planning is often contracted out through the land agents, or to independent suppliers, rather than directly with the LA planning department. This can be costly.
- New groups offering training, advice and support, such as Middle Marches Community Land Trust, provide a useful information hub for local land-based businesses

³⁶ McCracken R 2019 <https://www.friendsofthelakedistrict.org.uk/Handlers/Download.ashx?IDMF=3500deb5-6a19-4dc8-8f02-9f7d01f309cb>

9. Recommendations

The research found very little evidence of farming/land management practices in the area linked to tourism that were directly benefiting wildlife. The exception to this was for the purposes of shooting, where cover for birds and management of hedges and woodland benefitted other wildlife. (There are mixed views about whether shoots and raising game birds also have negative conservation impacts). Some farms were keen to farm in a way that benefits wildlife, but the income tended to be the priority and wildlife friendly farming was only an option if it fitted with existing farming practices. ELMS may change this.

Most farms that had successful tourism businesses used the income to provide a better, more stable standard of living. This was most often stated as the motivation behind tourism diversification.

Based on the previous analysis and many discussions with farmers, farm tourism businesses and land management bodies we propose a series of potential areas for action. See Section 10 Action Plan.

1. Shropshire Hills Farm Stays/Experiences project

There were examples in other areas where eco-agri-tourism projects had been undertaken. These examples used funding or other support from the public sector to set them up and run them. We believe that despite the lack of activity, there is an appetite within the sector locally to develop something in partnership. A partnership approach would mean that rather than one individual farm taking all the risks, a group of farms could be supported through the set up stages.

We propose a pilot project developing farm stays, working holidays and farm/conservation experiences in partnership with farmers/landowners. It could include conservation bodies such as NT, SWT, NE within the partnership. We would suggest gathering a collection of farms and farm accommodation businesses in a similar way to Shropshire Gold, but to put an emphasis on the 'authentic farm experiences,' low carbon living and hands-on conservation activity. A facilitator or project officer would need to work with individual farms to identify the opportunities and link in to a range of marketing platforms/media to establish a mechanism to promote the stays. It might also incorporate a visitor giving project, to help fund some of the conservation activities. Airbnb and accommodation listings provide an obvious route to market as does promotion through Instagram and other social media platforms.

We would therefore recommend that funding is secured for a project involving land managers and the main land management agencies, linked to tourism promotion bodies. It should be established with the idea of becoming an independent business after a set up period. Funding or business backing may need to be sought to set up and promote this. There may be scope for new partner organisations to participate, support or even leading this project.

2. Link farm tourism to local tourism networks

Our research highlighted how separate the farm tourism industry is from the mainstream tourism industry bodies. Farm businesses would benefit from being more in touch locally and local networks would benefit from the additional membership, synergy and opportunities for product promotion (such as linking farm locations to local restaurants, developing food to fork trails etc).

3. Farm tourism expertise development

In part to help address the issue highlighted above, we propose an annual Shropshire Hills destination farm tourism workshop, linked to the annual Shropshire Hills EXPO. The purpose would be to share information, provide training opportunities and develop a greater shared knowledge within the farm tourism network. The intention would be to invite farmers, land agents and business advisors to discuss opportunities and try to influence the private sector business advice that farmers receive so that they're better informed about tourism. There would be a strong emphasis of Sustainable Tourism in line with the area's Charter status.

4. Activities good practice charter

Feedback has indicated that there is a tension between local farmers and activity groups, especially Duke of Edinburgh Award Scheme participants. We propose a code of practice developed with local farmers, farming agencies, the Local Access Forum and AONB Partnership. Similar charters have been employed elsewhere (e.g. Pembrokeshire Coast NPA) leading to greater understanding and fewer issues. Activity groups would sign up to the Charter and in return be 'endorsed' by the governing body. Longer term cooperation may lead to promotional activity and future joint working arrangements (as Pembrokeshire).

5. Develop links to agricultural education

The scope of the brief did not cover the extent to which farm tourism, agri-tourism and conservation tourism are covered by education syllabi. We recommend that this area is explored to see what agricultural, conservation and ecology training is being offered at nearby universities and colleges such as Harper Adams University and Walford College and how the Stepping Stones partnership might influence or support it. Many young graduates may enter farming locally and develop new tourism and conservation related ideas for their farms.

6. Develop online resources

Gathering information is time consuming. Our experience was that farmers interested in starting up tourism businesses were unsure where to find information and resources. We recommend that a review of online resources is undertaken and compiled to provide links to existing material and potentially filling gaps. This should include advice on issues such as farm safety for visitors, food hygiene, etc, including links to the English Tourism Board 'pink book' that details the responsibilities of accommodation businesses.

7. Farm business advisor – tourism specialist

Farmers can call on support concerning land management issues but have little support concerning farm tourism. We propose identifying/recruiting a special farm tourism business advisor (probably covering the wider Marches area) who would be able to make visits to farms and provide bespoke farming, tourism and conservation advice. They could also support some of the networking and project ideas suggested above.

8. Visitor Giving Project

Our research has highlighted that more could be done in this area by working more closely with event organisers and local suppliers. We also suggest conservation holidays/days where visitors can be encouraged to provide their time. Experience on branded local produce, voluntary donations through bookings and parking. This could be linked to a local produce/supplier quality assurance scheme. It would also help to create better links with local cafés, pubs and restaurants who could potentially do more to buy locally and promote local food.

9. Green Campsite Scheme

The area is underdeveloped, tranquil and has an excellent view of the night sky, unobscured by street lighting. The images regularly published by Andrew Fusek Peters are testament to the quality of the night sky. They also offer great opportunities for promotion through social media.

There are several campsites in the area, many with an emphasis towards comfort and luxury 'glamping'. There is also a growing trend toward 'manicured' caravanning and campsites with full services including urban lighting. We suggest encouraging start-up businesses as well as existing camping and caravanning business to be part of a green camping network, promoting a sustainable ethos, with a stripped back to nature offer (as per Eco-escapes in Pembrokeshire). Shady Moor Farm is leading the way with this, but more may be encouraged to join with support from local public and charitable groups.

A green camping charter could help to promote eco-campsites and campsites with eco-quarters in a similar way to Walkers are Welcome.

10. Action Plan

This Action Plan aims to promote environmentally sustainable farm based leisure and tourism business activity in the project area, and potentially further afield.

This Action Plan is being disseminated to Stepping Stones partner organisations and to many of their farming and land management members and businesses. Further discussion will be required on detailed actions and costings and on which organisations are keen to lead. One option to help take the plan forward is to hold a wider meeting of interested people to discuss priorities and next steps.

Stepping Stones partners originally envisaged a further project to trial some of the priority recommendations.

This report is being finalised during the 2020 Covid 19 crisis and it is therefore suggested that recommendations, timeframes and priorities are reviewed and adjusted in due course.

| | Action | Lead bodies | Set up term | Funding/resources |
|---|---|---|-------------|---|
| 1 | Shropshire Hills Farm Stays/Experiences project | NT AONB VSH ³⁷ SWT NE | 5 years | RPA, LEP research required to feasibility with existing/new funding. AONB Conservation Fund |
| 2 | Develop local farm tourism/local tourism networks | AONB VSH | 2 years | Officer time only |
| 3 | Farm tourism expertise development | AONB VSH MGH ³⁸ | 2 years | Membership + LEP(?) |
| 4 | Activities good practice charter | OP ³⁹ , AONB NT, NE, OP MMCLT ⁴⁰ | 2 years | Officer time only |
| 5 | Develop links to agricultural education | NT, NFU, CLA, HAU ⁴¹ WC ⁴² | 2 years | Officer time only |

³⁷ Visit Shropshire Hills

³⁸ Marches Growth Hub

³⁹ Outdoor Partnerships – Shropshire Council

⁴⁰ Middle Marches Community Land Trust

⁴¹ Harper Adams University

⁴² Walford College

| | | | | |
|---|-------------------------------|---------------------------------------|---------|---|
| 6 | Develop online resources | CLA NFU MMCLT | 1 year | Funded through membership |
| 7 | Farm-tourism business advisor | CLA NFU NE | 2 years | RPA LEP? |
| 8 | Visitor giving project | NT AONB NE VSH AONBT ⁴³ | 3 years | Heritage Lottery AONBT Conservation Fund |
| 9 | Green Campsite Scheme | AONB NT VSH | 3 years | (Linked to 1,8,9) |

⁴³ AONB Trust

11. Credits & Contacts

- Report commissioned on behalf Stepping Stones Project

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Appendixes for this report can be viewed as separate documents to facilitate sharing more easily.

They are:

Appendix 1 Case Studies (PDF)

Appendix 2 Stakeholder Consultation Workshop (PDF)

Appendix 3 Stakeholder Consultation Workshop Slides (PDF)

Appendix 4 Visitor Economy Business Audit of Stepping Stones Area (Excel)

Details of Landowner/Farmer questionnaire, Tourism Business Questionnaire and landowner interviews can be obtained by contacting Nigel McDonald at the AONB Partnership.