



North Pennines Tourism Business Survey: Feb-May 2016





Executive summary

About the businesses:

- Half were based in Co. Durham. A third in Cumbria and the remainder (12%) were based in Northumberland.
- Almost half were accommodation providers: 30% are self-catering, 16% are B&Bs/guest houses.
- A third had been operating for less than 5 years. A third had been running for more than 21 years.
- Overwhelmingly tourism businesses in the area are small: 86% employ five people or less. 42% are 1-person enterprises. A third reported annual turnovers of up to £25K.
- 45% reported that between 21 and 60% of their turnover was spent in the local economy.
- Almost half of all stays with accommodation businesses were short breaks (2-4 nights). 23% of all stays were for single nights.
- Most (almost 90%) of businesses did not have a green award/ecolabel.
- 80% of businesses are open all year. Most of the seasonal businesses are open between March and October.
- Just over a third employ seasonal staff most seasonal staff are needed between April and October.

Markets and visitor motivations:

- When asked to compare volume of customers/businesses to the previous year a third said that it had grown, just under a half that it had stayed the same and just under a fifth reported a decline.
- The two most important groups for tourism businesses in the North Pennines are couples (90% ranked these as important or very important) and groups of friends (74% important/very important).
- The top five (reported) motivations for visiting the North Pennines (based on businesses ranking them as very/quite important) are: peace and tranquillity; enjoying the view; walking; visiting the North Pennines as a destination; and AONB designation.

The future

- 93% of respondents are interested in increasing business over 65% wanted to see more business/customers all year round. The top five months in which more business was wanted were: March, October, February, November and April.
- The top five topics of interest to tourism businesses were: energy saving; using local food and produce; supporting action to look after wildlife and the landscape; waste reduction and reducing light pollution.

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Suggested citation:

NPAP (2016) North Pennines Tourism Business Survey: February-May 2016. North Pennines AONB Partnership: Stanhope.

1: Introduction and methodology

An online (SurveyMonkey) questionnaire survey was carried out for 12 weeks between 15 February and 11 May 2016. **Appendix 1** contains the full text of the questionnaire. An incentive for businesses to complete was offered in the form of the opportunity to be entered into a prize draw to win copies of the AONB Partnership's books and DVDs.

The survey was promoted through: the North Pennines Tourism Working Group; the area's tourism associations; the AONB Partnership's social media channels; at the North Pennines Tourism Seminar in March 2016; and through direct contact with businesses. A total of 90 surveys were completed.

2: About the businesses

Half of the respondents run businesses located in County Durham. Just over a third are based in Cumbria. The remainder (12%) are based in Northumberland.

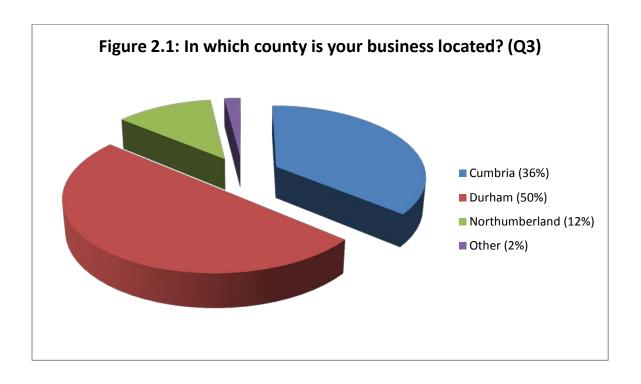
The top five postcodes of respondents (making up 57% of the sample) were:

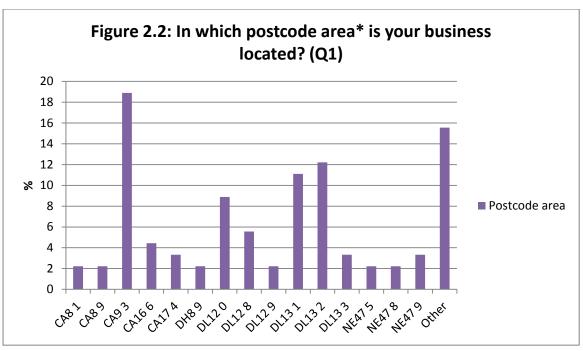
- 1. CA9 3 (19%) Cumbria: Alston, Garrigill, Nenthead
- 2. DL13 2 (12%) Co. Durham, Weardale: Stanhope, Frosterley, Eastgate, Rookhope
- 3. DL13 1 (11%) Co. Durham, Weardale: Westgate, St. John's Chapel, Ireshopeburn
- 4. DL12 0 (9%) Co. Durham, Teesdale: Middleton, Eggleston, Holwick, Forest, Mickleton, Langdon Beck
- 5. DL12 8 (6%) Co. Durham, Teesdale: Barnard Castle.

The top five business types of respondents (making up 70% of the sample) were:

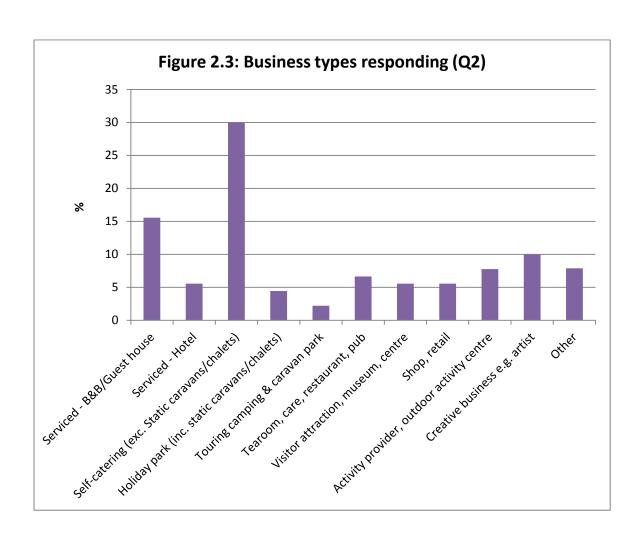
- 1. Self-catering (30%)
- 2. Serviced B&B or guest house (16%)
- 3. Creative businesses e.g. artist (10%)
- 4. Activity provider/outdoor activity centre (8%)
- 5. Tearoom/café/restaurant/pub (7%)

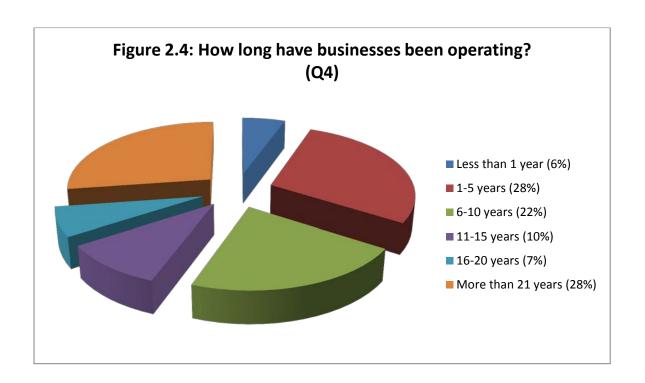
A third of businesses have been operating less than 5 years (6% less than a year). Just under a third (28%) have been in existence for more than 21 years.

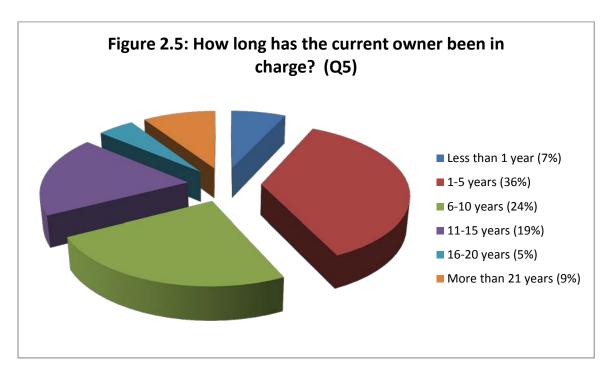




^{*}Only shown if 2 or more businesses responded from that postcode area (otherwise they are included in 'other')





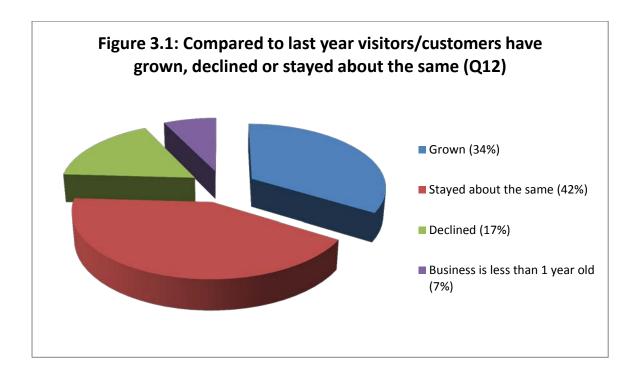


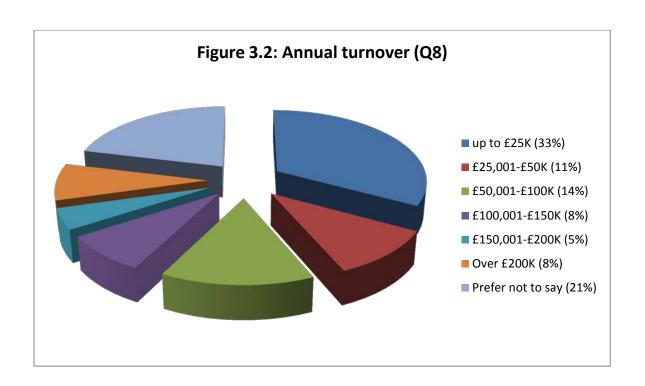
3: Economics, volume and value

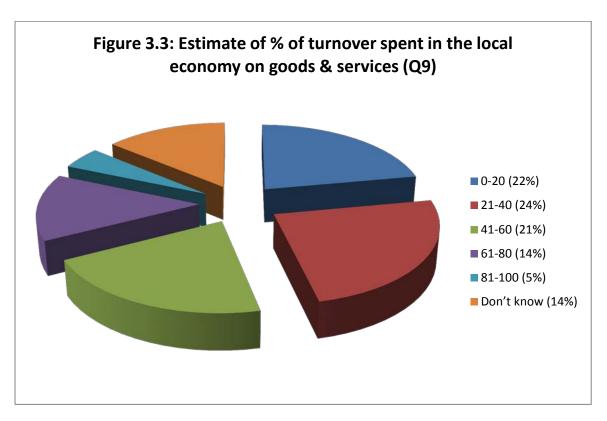
When asked to compare their volume of customers/business to the previous year a third said that it had grown, just under half that it had stayed about the same and just under a fifth (17%) reported a decline.

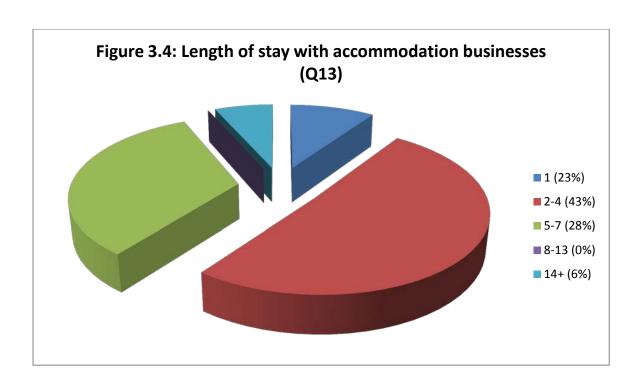
A third of businesses (33%) reported an annual turnover of up to £25K. Only 13% reported turnovers of £150,000 and over. When asked to estimate the percentage of turnover spent on goods and services in the local economy 45% reported between 21 and 60%.

Almost half (43%) of all stays with accommodation businesses were short breaks of between 2 and 4 nights. Of note is that a fifth (23%) of all stays are for a single night – presumably associated with recreational routes (e.g. Pennine Way, C2C Cycle Route, Isaac's Tea Trail etc.).







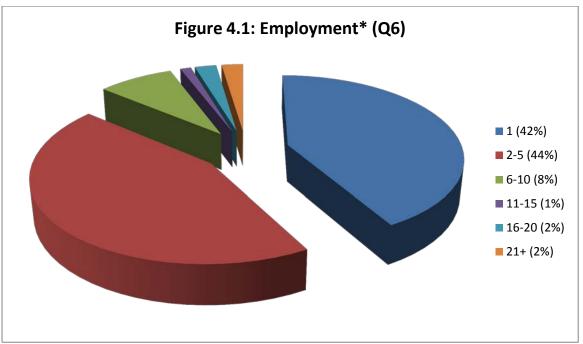


4: Employment and seasonality

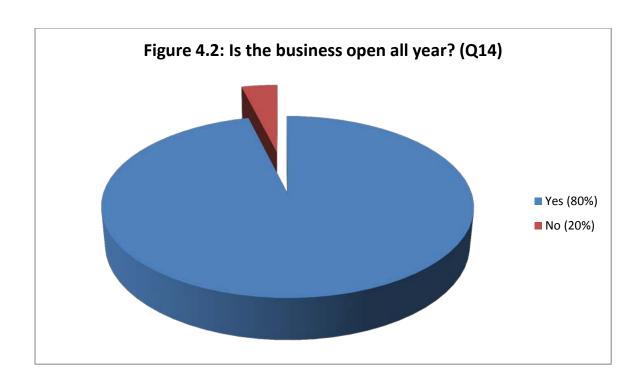
Overwhelming tourism businesses in the area are small – with 86% employing five people or less. Forty-two percent are 1-person enterprises.

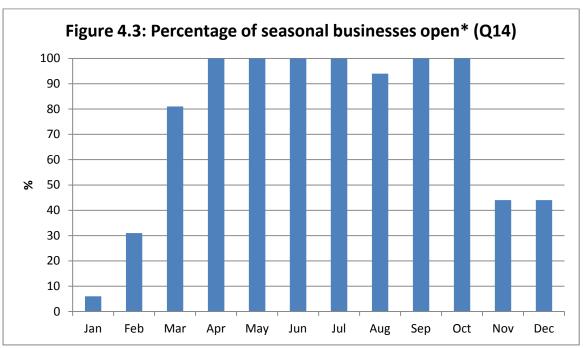
Eighty percent of businesses are open all year. Of the 20% who are seasonally open most open between March and October (inclusive).

Just over a third of businesses employ seasonal staff. The peak month for employing seasonal staff is August – with 92% of businesses (which identified themselves as seasonal employers) saying they did. Broadly most seasonal staff are needed between April and October.

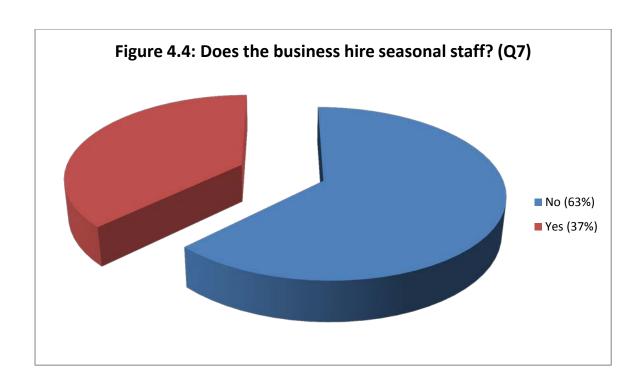


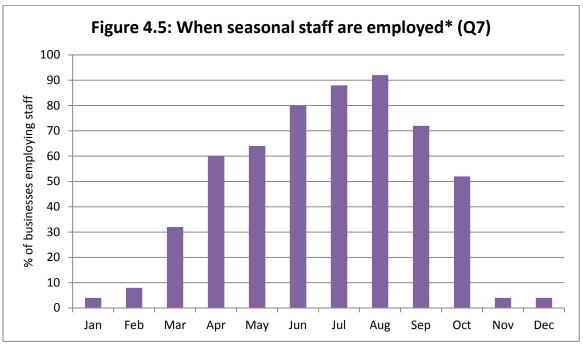
^{*}Expressed in full time equivalents, including business owner/manager





^{*16} businesses responding to Q14 identified themselves as seasonal (i.e. closed for part of the year). This chart illustrates the percentage of these businesses open in a given month.

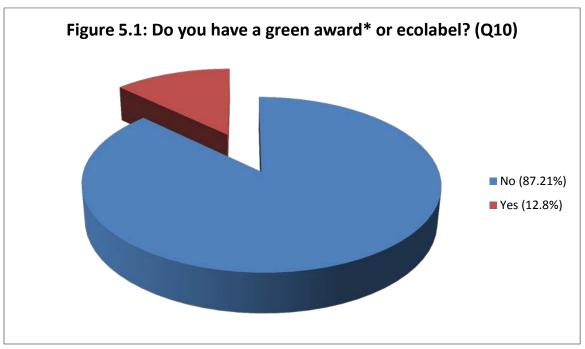




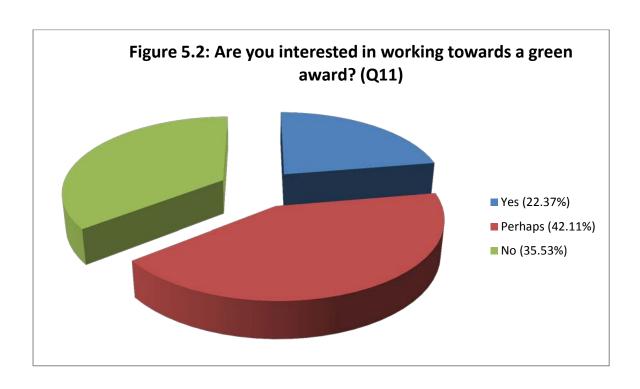
^{*}This figure expresses the percentage of businesses that indicated they did employ seasonal staff, employing staff in a given month.

5: Green awards

The vast majority (87%) of businesses do not have a green award or eco-label. A fifth (22% or 17 businesses) expressed an interest in working towards one. Forty-two percent stated that they might perhaps be interested – perhaps indicative of a knowledge gap in terms of exactly what a green award/ecolabel is and what is involved in getting one. The comments made broadly support this.



^{*}Of the businesses that do have green awards (11) 8% are Green Tourism (formerly Green Tourism Business Scheme) and 2% are David Bellamy Awards.



If they answered perhaps, we asked them is there anything which would help you make your mind up?

Comments:

- C1: don't quite know how I could get a green award....
- C2: What is involved and would we qualify?
- C3: I have never looked into this, and don't know what is involved.
- C4: Relevance
- C5: Happy to be assessed but not at GTBS costs
- C6: The resource to undertake the application our willing band of volunteers is already stretched.
- C7: I think that there is very little 'meaningful' that we can do. We did want to convert to ground mounted solar panels for electricity, but because they were ground mounted we needed planning permission and, despite the fact that they would be invisible to all other residents, Durham CC planning department were unhelpful that we had to give up the idea.
- C8: We do our best as a small business, recycling, composting, drying washing outside, low wattage light bulbs the list is endless but I see this as yet another cost to the business when our guests mainly C2Cand Shooters do not consider green issues when looking to book.
- C9: A visit from someone to explain what a green award would entail, as I know nothing about it.
- C10: The ease of which we could gain it!
- C11: We used to be in the GTBS but felt that the organisation running the scheme were very disorganised to put it mildly and the cost for what we were getting was not good value for money.
- C12: we had gold award but felt the cost of continued accreditation was prohibitive
- C13: Cost & Criteria
- C14: As an organisation with a tiny income the annual subscription to such schemes is better spent on greening the museum than on the accreditation scheme.
- C15: I've no idea what one is, truth be known! But I would very much like more information.
- C16: Only if it was free, don't make enough to, pay high fees.
- C17: I am not sure how I would apply to me. I tend to work for other companies and or projects so it is difficult for me to answer this.
- C18: More information
- C19: Idea of cost and benefit. I already think I run a green business and work hard to ensure it remains so.
- C20: We work green but don't have cash to shout about it our priority is maintaining an historic building to the highest level
- C21: Would need to know the added costs involved as we work on very tight margins.
- C22: More information

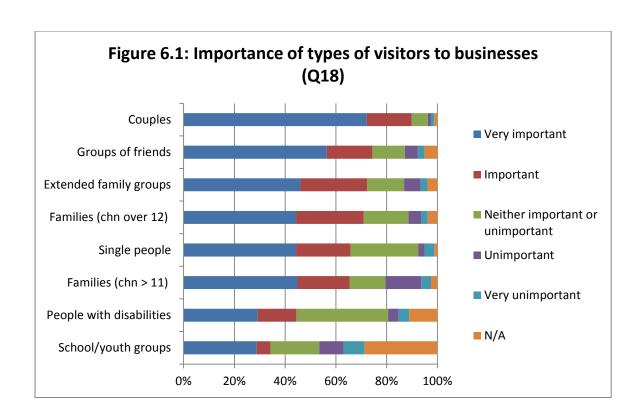
6: Markets, marketing and how's business?

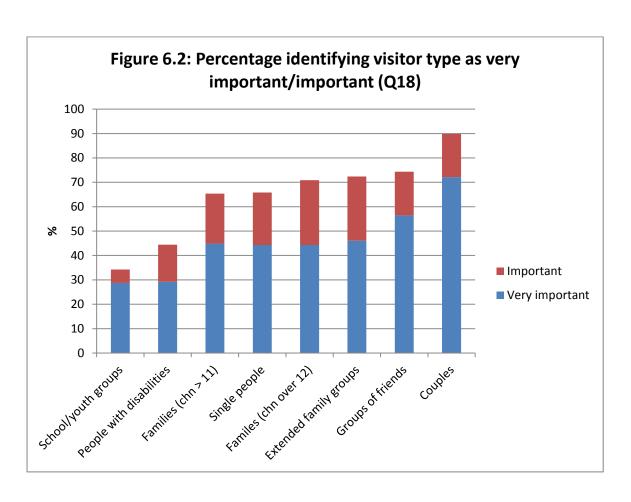
The top five groups (based on businesses ranking them as important/very important) for tourism businesses in the North Pennines are:

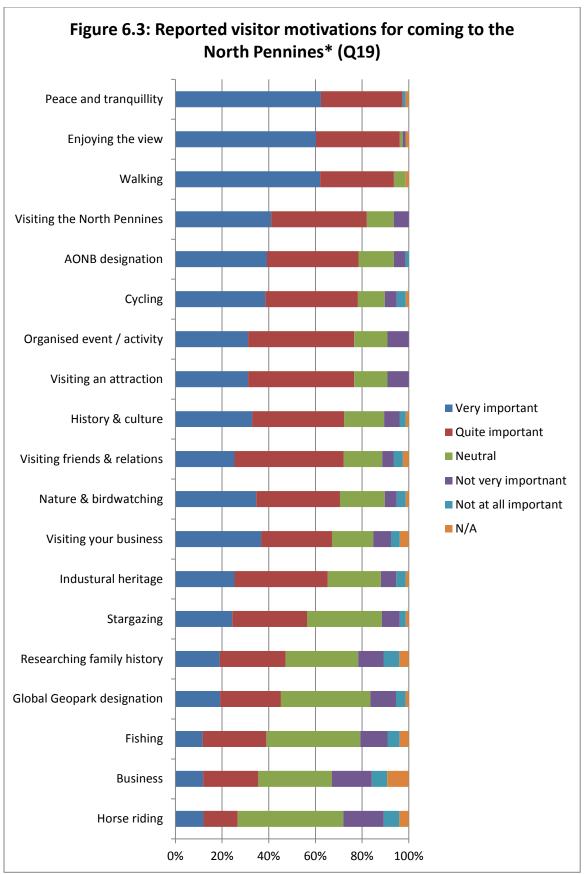
- 1. Couples (90% combined: important-18%/very important-72%)
- 2. **Groups of friends** (74% combined: important-18%/very important-56%)
- 3. Extended family groups (72% combined: important-26%/very important-46%)
- 4. **Families with older children** (12 years+) (71% combined: important-27%/very important-44%)
- 5. Single people (66% combined: important-22%/very important 44%)
- [6. Families with younger children (less than 11 years) (65% combined: important-21%/very important-45%)
- 7. People with disabilities (44% combined: important-15%/very important-29%)
- 8. School/youth groups (34% combined: important-5%/very important-29%)]

The top ten reported motivations for visiting the area (based on businesses ranking them as very/quite important) are:

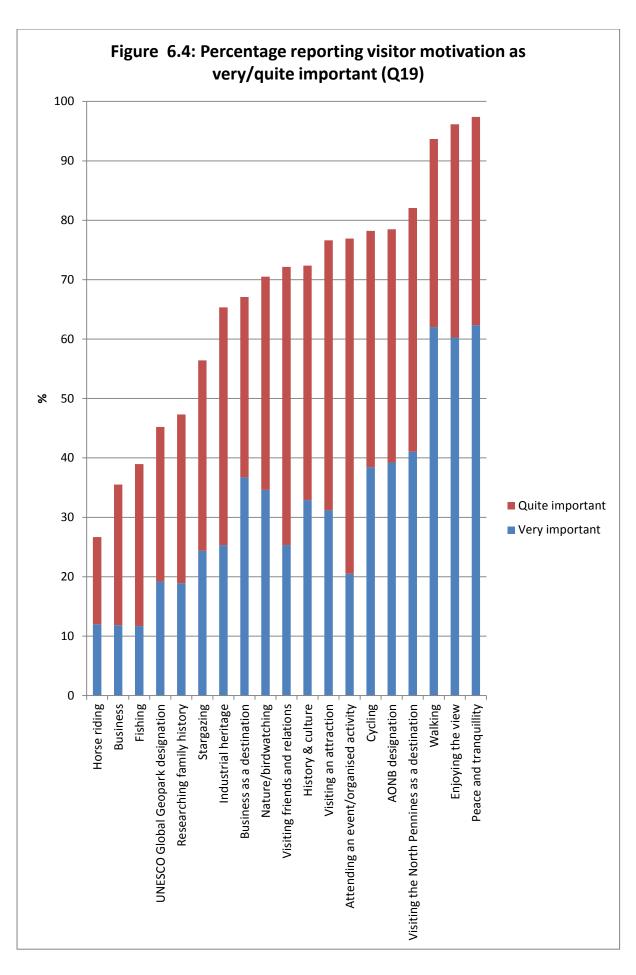
- 1. Peace and tranquillity (97% combined: quite important-35%/very important-62%)
- 2. **Enjoying the view** (96% combined: quite important-36%/very important-60%)
- 3. Walking (94% combined: quite important-32%/very important-62%)
- 4. **Visiting the North Pennines as a destination** (82% combined: quite important-41%/very important-41%)
- 5. **Area of Outstanding Natural Beauty (AONB) designation** (78% combined: quite important-39%/very important-39%)
- 6. **Cycling** (78% combined: quite important-40%/very important-38%)
- 7. **Attending an event/organised activity** (77% combined: quite important-56%/very important-21%)
- 8. Visiting an attraction (77% combined: quite important-45%/very important-31%)
- 9. History and culture (72% combined: quite important-39%/very important-33%)
- 10. **Visiting friends and relations** (72% combined: quite important-47%/very important-25%
- [11. Nature watching/birdwatching (71% combined: quite important-36%/very important-35%)
- 12. Visiting your business as a destination (67% combined: quite important-30%/very important-37%)
- 13. Industrial heritage (65% combined: quite important-40%/very important-25%)
- 14. Stargazing (56% combined: quite important-32%/very important-24%)
- 15. Researching family history (47% combined: quite important-28%/very important-19%)
- 16. UNESCO Global Geopark designation (45% combined: quite important-26%/very important-19%)
- 17. Fishing (39% combined: quite important-27%/very important-12%)
- 18. Business (36% combined: quite important-24%/very important-12%)
- 19. Horse riding (27% combined: quite important-15%/very important-12%)]

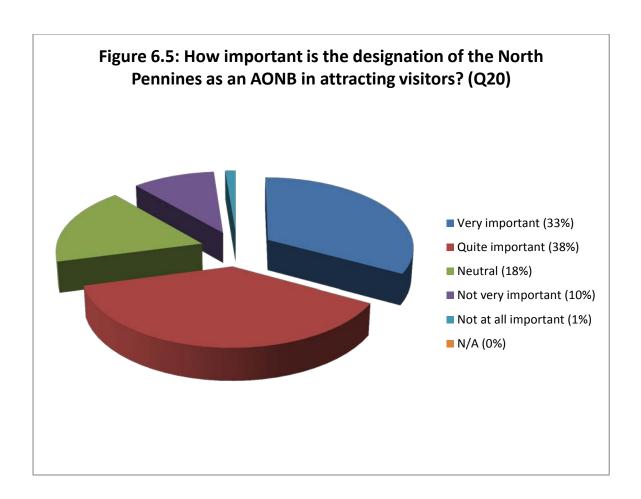


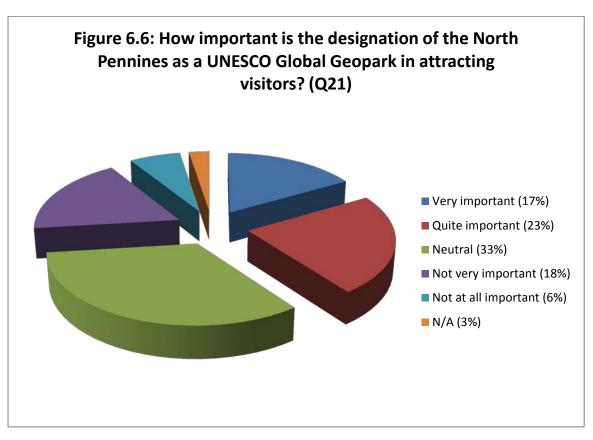




^{*}Businesses were asked how important various themes were as 'motivations for visiting the North Pennines'.







7: The future

Ninety-three percent of businesses are interested in increasing business.

The top five months in which increased business is wanted are:

- 1. March (*84%)
- 2. October (78%)
- 3. February (77%)
- 4. November (75%)
- 5. April (75%)

Over 65% of businesses wanted increased business in all 12 months of the year.

The five months with least demand for increased business (from which it is possible to infer that they are the busiest months) are: June, September, July, August and May.

The top topics of interest to businesses are:

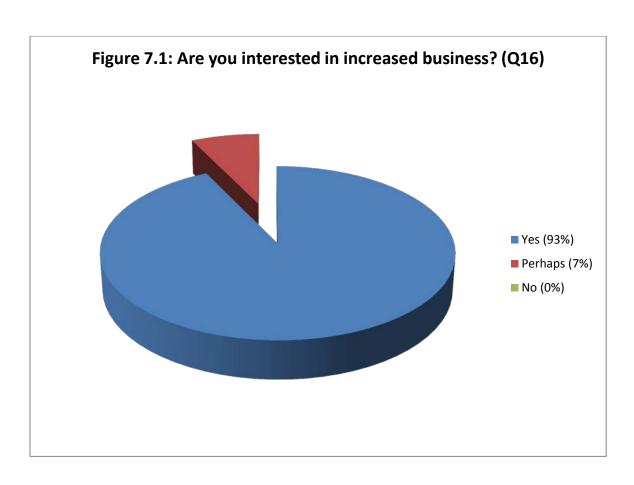
- 1. **Energy saving** (92% combined: interested-47%/very interested-45%) and 86% have taken action
- 2. **Using local food and produce** (83% combined: interested-24%/very interested 59%) and 77% have taken action
- 3. **Supporting action to look after wildlife and the landscape** (interested-30%/very interested-32%) but only 42% have taken action
- 4. **Waste reduction** (78% combined: interested-38%/very interested-40%) and 68% have taken action
- 5. **Reducing light pollution** (74% combined: interested-42%/very interested-32%) but only 19% have taken action.

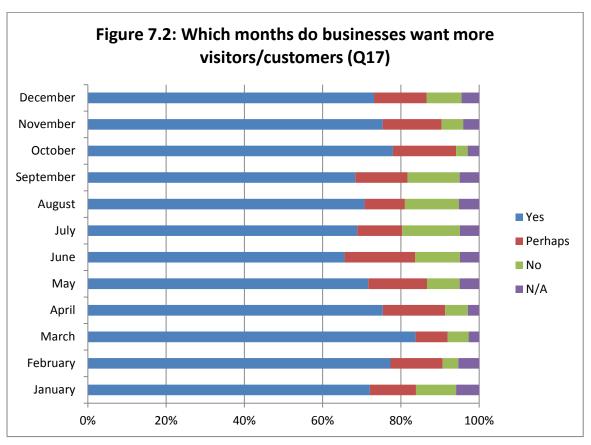
Visitor giving:

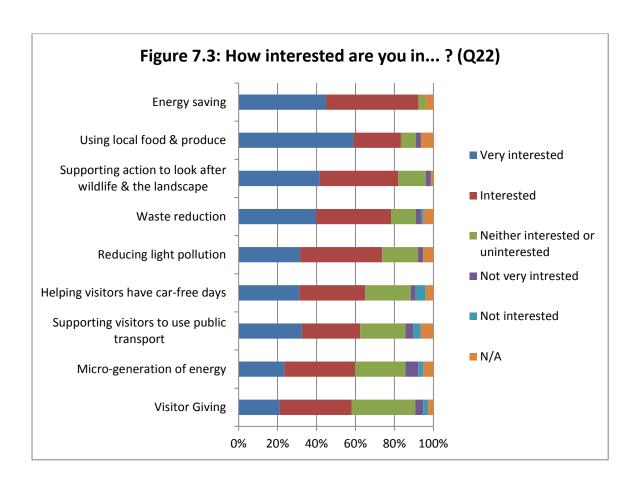
Almost half (48%) of respondents stated that they would 'perhaps' be interested in finding out more about visitor giving. This might indicate a lack of understanding of what the concept is and how it might be implemented in the North Pennines/integrated as part of their business model. In addition businesses identified it as the least interesting topic (9 out of 9) - with 74% being either interested/very interested in it (Q22). Unsurprisingly not many businesses have taken action (17%) in this area.

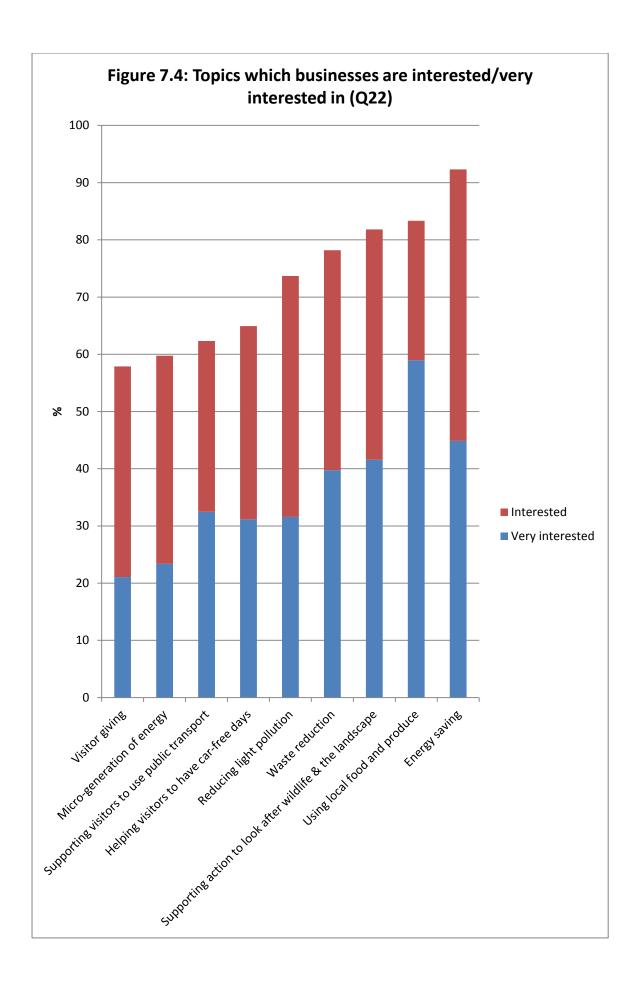
However businesses did express higher levels of interest in 'supporting action to look after wildlife and the landscape' – which came out 3rd (out of 9) with 82% of businesses being interested/very interested in the topic. Given that visitor giving is a means of fulfilling this aspiration this disparity could be explained though lack of awareness of the concept.

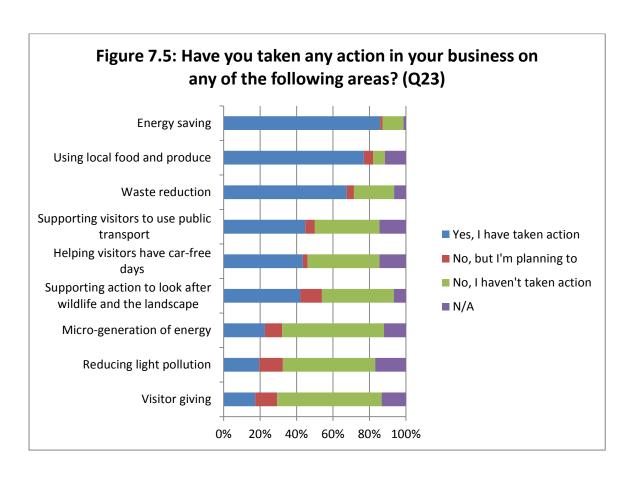
^{*}i.e. 84% of businesses want to see more business/customers in March

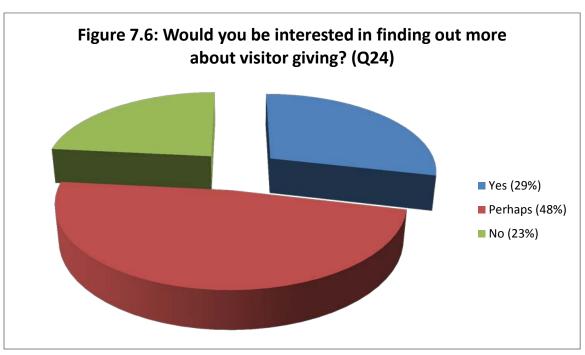




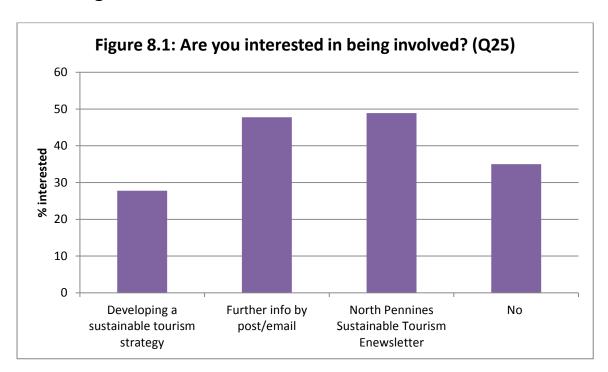








8: Getting involved



Shane Harris Responsible Tourism Lead: North Pennines AONB Partnership June 2016

Appendix 1: Questionnaire

Welcome

Thank you for taking the time to complete this survey. It shouldn't take you more than 15 minutes. Your responses will NOT be attributed to you personally and we will not share your contact details with anyone else.

Your answers will help the North Pennines Area of Outstanding Natural Beauty (AONB) Partnership to work more effectively with tourism businesses, and other organisations, in the area. It will also help us to develop a sustainable tourism strategy for the AONB and UNESCO Global Geopark.

Please complete by Monday 11 April 2016 and if you want to be entered into the prize draw to win copies of our popular books and DVDs don't forget to let us have your contact details.

If you have any problems completing the survey please contact Shane Harris (01388 528801 or shane@northpenninesaonb.org.uk) - Responsible Tourism Lead with the AONB Partnership.

About your business

*Q1: What is the postcode of your business?

Q2: Business type [Note, if you run more than one business, describe the one you see as your main concern (i.e. the one with the largest turnover). Please answer the rest of the survey questions for this business]

Serviced – B&B or guest house
Serviced – Hotel
Self-catering (excluding static caravans/chalets)
Holiday Park (including static caravans/chalets)
Touring camping and caravans
Tearoom, café, restaurant
Visitor attraction/museum/centre
Shop/retail
Activity provider/outdoor activity centre
Creative business (e.g. artist)
Other (please specify)

*Q3: Which county are you in?

Cumbria
Durham
Northumberland
Other (please specify)

Q4: How long has your business been operating?

Less than 1 year 1-5 years 6-10 years 11-15 years 16-20 years More than 21 years

Q5: How long has your business been under YOUR ownership/management?

Less than 1 year

```
1-5 years
        6-10 years
        11-15 years
        16-20 years
        More than 21 years
Q6: How many people do you employ? [include yourself and please express your answer in full time
equivalents]
        1
        2-5
        6-10
        11-15
        16-20
        21+
Q7: If you employ staff on a seasonal basis, please indicate which months they are employed:
        No seasonal staff are employed
        Months of the year
Q8: What is your annual turnover?
        Prefer not to say
        Up to £25,000
        £25,001-£50,000
        £50,001-£100,000
        £100,001-£150,000
        £150,001-£200,000
        Over £200,000
Q9: Please estimate what percentage of your turnover is spent in the local economy (on goods and services)
        Don't know
        0-20%
        21-40%
        41-60%
        61-80%
        81-100%
Q10: Does your business have a green award or ecolabel?
        No
        Green Tourism Award (green Tourism Business Scheme)
        TripAdvisor GreenLeaders
        David Bellamy Award
        Green at Heart (Cumbria Business Environment Network)
        Other (please specify)
Q11: If you don't have a green award are you interested in working towards one?
        Yes
        Perhaps
```

If you answered perhaps is there anything which would help you make your mind up?

No

Markets, marketing and how's business?

Q12: When compared to last season (2015) would you say your visitor/customer numbers have...

Grown

Stayed about the same

Declined

My business is less than 1 year old

Q13: On average how many nights do your visitors stay with you?

Not applicable – We're not an accommodation business

1

2-4

5-7

8-13

14+

Q14: Which months of the year is your business open?

All year

Months of the year

Q15: If you are not open all year would you be prepared to open for special events out of season?

Yes

Perhaps

No

Not applicable

Q16: Are you interested in increased business?

Yes

No

Perhaps

Q17: In which months, if any, do you want more business/customers?

Options: Yes; Perhaps; No; N/A.

Months of the year

Q18: Please rate the importance of the following types of visitors/customers for your business...

Options: Very important; Important; Neither important or unimportant; Unimportant; Very unimportant; N/A.

Single people

Groups of friends

Couples

Families with young children (less than 11 years)

Families with older children (12 years and over)

Extended family groups

People with disabilities

School/youth groups

Other (please specify)

Visitor motivations

Q19: How important do you think the following are as motivations for visiting the North Pennines?

Scale: Very important; Quite important; Neither important or unimportant; Not very important; Not at all important; N/A.

Visiting the North Pennines as a destination

Visiting your business as a destination

Visiting friends and relations

Attending an event/organised activity

Visiting an attraction

Area of Outstanding Natural Beauty (AONB) designation

Enjoying the view

Peace and tranquillity

Business

Cycling

Walking

Stargazing

UNESCO Global Geopark designation

Horse riding

Fishing

Nature watching/birdwatching

Industrial heritage

Researching family history

History and culture

Other (please specify)

Q20: In your view, how important is the designation of the North Pennines as an Area of Outstanding Natural Beauty (AONB) in attracting visitors/customers to your business?

Options: Very important; Quite important; Neither important or unimportant; Not very important; Not at all important; N/A.

Q21: In your view, how important is the designation of the North Pennines as a UNESCO Global Geopark in attracting visitors/customers to your business?

Options: Very important; Quite important; Neither important or unimportant; Not very important; Not at all important; N/A.

The future

Q22: How interested are you in...

Options: Very interested; Interested; Neither interested or uninterested; Not very interested; Not interested; N/A

Energy saving

Micro-generation of energy

Waste reduction

Using local food and produce

Supporting visitors to use public transport

Helping visitors have car-free days

Visitor giving (helping visitors to contribute to looking after the North Pennines)

Supporting action to look after wildlife and the landscape

Reducing light pollution

Q23: Have you taken any action in your business on any of the following areas?

Options: Yes, I have taken action; No, but I am planning to take action; N, I have not taken action; N/A

Energy saving
Micro-generation of energy
Waste reduction
Using local food and produce
Supporting visitors to use public transport
Helping visitors have car-free days

Visitor giving (helping visitors to contribute to looking after the North Pennines)

Supporting action to look after wildlife and the landscape

Reducing light pollution

Contact details and prize draw

Q24: Would you be interested in finding out more about visitor giving (helping people to contribute to looking after the North Pennines) and how your business could get involved?

Yes Perhaps No

Q25: If you would like to be involved/kept up to date with the work of the North Pennines AONB Partnership please select from the choices below:

I'd be interested in getting involved with developing a sustainable tourism strategy for the North Pennines

I'd like to receive further information from the AONB Partnership by post/email I'd like to receive the North Pennines Sustainable Tourism Enewsletter

Q26: Do you want to be entered into a prize draw to receive copies of books and DVDs produced by the AONB Partnership? (e.g. Reading the Rocks, A History of Hay Time, Tales from the Old Quarrymen)

Yes No

Q27: Please give your contact name and details if you want to. We will definitely need them if you want to be entered into the prize draw and/or added to our mailing lists.

Q28: Is there anything else you would like to say in relation to tourism in the North Pennines Area of Outstanding Natural Beauty?

Appendix 2: Free-text comments (Q28)

- A1: We feel there needs to be more publicity within Britain about the North Pennines area as a destination within its own right. I have personally managed to get a Destination guide The Independent Hostel Guide to create a new area map specifically for the North Pennines as I felt hostels within it were being placed inappropriately listed as within in areas e.g. The Lake District! We need to make people more aware of what is here and why they should visit to keep the towns and villages going. Alston is in dire need of more business to keep our lovely shops open!
- A2: I fully support the Roof of England project; an opportunity to collectively develop a strategy for tourism businesses across our politically fragmented region. I hope that this will be developed in conjunction with the AONB, and that we can promote the North Pennines as a visitor destination, "singing from the same song sheet". It is in all of our interests to increase visitor numbers to what we all know is a hidden gem in the tourism map of England.
- A3: Needs more publicity particularly on the edges
- A4: to be encouraged! we are always competing with the "honeypot" areas of south England. there is life north of Watford
- A5: Keep up the good work the North Pennines need you.
- A6: There is a need for the area to gain more national publicity to bring in the visitors to help to pay for the improvements that we would all like to see and to make sure that current businesses and facilities survive to the benefit of us all. Visit Durham show a 'Durham-centred' that shows a lack of care or understanding of this area whilst the AONB seems to lack the funding necessary to promote the area in the same way as National Parks are able to so successfully.
- A7: We love it!:)
- A8: There needs more shops and activity centres
- A9: Forget all this nonsense about sustainability (if you believe that electric bikes, hybrid cars and public transport are 'sustainable', then you need to do some homework and ask some searching questions). Concentrate instead on the real issue of attracting tourists here, which means making people aware that the North Pennines is an attractive destination. A really good, informative website would be a start, so that people actually know that this place exists and what they can do when they get here. Many of my customers come here on route to somewhere else or even by accident, thinking it is the Lake District, but then stay longer when they realise that it has attractions. The trouble is that nobody has heard of the North Pennines. In that respect your organisation has failed and needs to up its game.
- A10: Council needs to improve litter problem!
- A11: Public transport is a big problem ... especially to Rookhope ... almost negligible!!! Especially in the summer when the schools are on holiday!!!
- A12: Really appreciated the social media course in the Forge now using Twitter and Instagram
- A13: Keep up the good work!
- A14: No commercial offers please, would be interested to have our bb on Pennines website under accommodation!

- A15: I would really like to reduce our businesses light pollution to tie in with dark skies watching but I can't find any outdoor lights which are aimed at reducing light pollution. Some kind of advice on best practice either online or through a workshop would be very welcome.
- A16: We need to get serious about it
- A17: If we do not actively support small business in and around this area to provide services and accommodation to stay overnight then the local economy will not develop as we need visitors to spend on products and services in our area
- A18: More support from Durham County Council
- A19: We need more projects or activities celebrating the archaeology and heritage in our area. Been involved in national events helps. Little or no public transport in this area. I help on the business side of the TIC in Middleton-in-Teesdale and I believe it is a vital resource that needs to be helped and supported, plus encourage young people to get involved
- A20: Please do not go down the route of charging for car parking in places such as Bowlees. I know many people who are affected by high car park charging in places such as the Lake District. Some are paying for a lot for parking and then avoiding spending in cafes, pubs etc. This takes money from local businesses.
- A21: To be realistic guests are not going to leave their cars at their accommodation and go in search for public transport as much as we try and encourage this. It is too time consuming. They want to get from a to b as soon as possible to enjoy their activities. Those who use public transport are more likely to find accommodation in a village. The problem they have is Sunday transport
- A22: The above questions about public transport for tourists? A tourist could not explore the area without their own transport. It is just not practical with the services provided. As you guys at the AONB know tourism has a long way to go in the area when you compare it with other AONB areas like Nidderdale the Cotswolds etc. The fact that three local authorities share this magnificent area has to have held the area back as a visitor destination, as each council only focuses on their own county attractions. The area has to offer more as a package to be a worthwhile area to visit especially to attract overnight guests.