

The Malvern Hills AONB and Tourism

March 2012



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Executive Summary – The Malvern Hills AONB and Tourism

The aim of this report is to: consider tourism issues relating to the AONB and options for partnership working on a sustainable tourism agenda.

Background and Context

The Malvern Hills AONB is smaller than many other UK AONBs and forms part of four local authority areas. It has a core attraction of the Hills themselves which are heavily visited throughout the year, especially by day visitors and local people, surrounded by a much less visited rural area, plus major visitor draws at Eastnor Castle and the Three Counties Showground and the towns of Great Malvern and Ledbury. Visitor numbers are estimated at about 1.5 million a year (2000), plus local users.

The AONB Management Plan includes a vision for tourism but the approach is currently somewhat ad hoc and reactive. The major Sustainable Tourism Strategy in 2001 was comprehensive and ambitious but failed to engage partners or communities and was only partially implemented. Changes since this date include: the implementation of the HLF funded project to restore Malvern's wells and spouts; the loss of the Malvern Water factory (and opening of the Holy Well); new technologies such as smart phones; the loss of the Hills Hopper bus service; and the start of the Route to the Hills project in Great Malvern. The AONB has developed its communications with a corporate identity and an attractive website and specific publications such as trails. Current tourism related projects include a trail using QR codes and a new map based leaflet for the AONB.

The policy and funding context includes the reduction in local authority funding for tourism (e.g. the withdrawal of funds from Ledbury TIC), the loss of Regional Development Agencies and regional funding for tourism projects and the advent of the Local Enterprise Partnerships. It has been a time of change with county and local tourism organisations - Visit Herefordshire and Destination Worcestershire have been established and town based groups in Ledbury and Great Malvern have gone through changes.

Issues affecting the AONB include:

- The lack of a clear policy position on tourism from the AONB and the Conservators
- The area being split between three counties affects promotion and co-ordination
- Physical impacts and loss of tranquillity due to increasing numbers of people using the hills
- Continuing growth of the local population
- Mixed views on sustainable tourism- its potential and appeal- to visitors and businesses.
- Complaints about inappropriate mountain biking, dog mess and user conflicts on the hills
- Implementing and communicating about land management measures and farming

Best practice in tourism in UK AONBS

Some AONBs have little involvement in tourism, possibly because there is no perceived need to attract more visitors for environmental or economic reasons. More proactive approaches by AONBs include:

- Applying for European Charter for Sustainable Tourism in Protected Areas, which involves agreeing a Sustainable Tourism Strategy – 10 AONBs.
- Setting out a Position Statement on Tourism
- Establishing an AONB tourism group or forum
- Our Land – the major web based collaborative promotion of rural tourism in the South East AONBs and National Parks.
- Sense of place toolkits and training for local businesses
- Visitor payback schemes
- Website developments
- Promotional print and use of social media
- Award schemes for tourism projects
- Specific funded projects through HLF Landscape Partnerships or LEADER funding
- Specific focus on events, walking, public transport

Options for the way forward

Options that the Malvern Hills AONB could consider taking forward fall into six areas (and immediate priority levels have been proposed):

| 1. Policy | Priority |
|--|-----------------|
| 1.1 Clarify the AONB's policy/stance on tourism | High |
| 1.2 Sustainable tourism partnership agreement/ memorandum | Medium |
| 1.3 Develop a Sustainable Tourism Strategy (possibly then Europarc Charter) | Low |
| 1.4 Develop a visitor management or recreation strategy | Low |
| 1.5 Influence partners' tourism and marketing strategies | High |
| | |
| 2. Communications | |
| 2.1 Raise awareness of the AONB, throughout AONB activities | High |
| 2.2 Update AONB Communications Plan | High |
| 2.3 Review and extend AONB website and functions | Medium-High |
| 2.4 Increase outreach – events, meetings, wider network of partners | High |
| 2.5 Increase PR activity – more press releases and build media links | Medium |
| 2.6 Establish an AONB 'presence' at key location(s) – using new map | Medium |
| 2.7 AONB map poster – widespread display of poster version of new map | Medium |
| 2.8 Use social media – use facebook, twitter to build friends/followers | Medium |
| 2.9 AONB E-newsletter – new version for wider audience | Medium |
| 2.10 Promotional media – promotional print, advertising, video | Low |
| 2.11 AONB boundary signs – or brand village welcome signs | Low |
| 2.12 Sustainable tourism awards – to showcase good practice | Low |
| | |
| 3. Partnership working | |
| 3.1 Strengthen partnership working | High |
| 3.2 Establish a tourism forum or liaison group | Medium |
| 3.3 Join tourism organisations and participate – events, publications, campaigns | Medium |
| 3.4 Support partner funding bids/projects eg for RDPE or training projects | High |
| | |
| 4. Research | |
| 4.1 Discuss research priorities with partners – with a view to joint research | High |

- | | | |
|-----|---|--------|
| 4.2 | Visitor survey – types, views, behaviour, trends | High |
| 4.3 | Update accommodation stock data – to help monitor economic impact | Medium |
| 4.4 | Economic impact research – update 2000 report | Medium |
| 4.5 | Monitoring visitor numbers – trial techniques | Medium |
| 4.6 | Environmental impact research – trial techniques | Low |
| 4.7 | Business survey – to identify most promising initiatives | High |

5. Delivering projects/ actions

- | | | |
|-----|---|--------|
| 5.1 | Walking and cycling – routes, publications, apps, Walkers are Welcome, electric bikes, special breaks | High |
| 5.2 | New technology – apps, QR codes, WiFi, new ways of giving information | High |
| 5.3 | Sense of place – product branding, food and drink, events, training, trips | High |
| 5.4 | Joining up and spreading out – stronger interlinkages and cross promotion | Medium |
| 5.5 | Support specific development proposals – from private sector/others | Medium |
| 5.6 | Visitor payback – monitor practice elsewhere, business sponsorship | Low |

6. Developing future prospects

- | | | |
|-----|--|--------|
| 6.1 | Support and participate in new projects – with partner organisations | High |
| 6.2 | Develop a more ambitious AONB project – lead future funding bid | Medium |

1. Introduction

This report was commissioned by the Malvern Hills Area of Outstanding Natural Beauty (AONB) as a 'think-piece' on tourism in the area. The aim is to:

- Consider some of the main issues related to tourism in the area and the desirability/necessity of working with partners inside and outwith the AONB boundary on these.
- Identify opportunities and mechanisms for moving forward with a sustainable tourism agenda for the area and the pros and cons linked to these, plus possible resources required.
- Signpost relevant recent/current work at other organisations and AONBs.

The report was written in March 2012. The analysis was based on a focused review of:

- past tourism related Malvern Hills AONB documents
- a discussion with the AONB Manager and Assistant Manager
- discussions with six key stakeholders/organisations and documentation some of them provided
- a brief review of best practice at other AONBs
- a review of current visitor related publications, collected at Great Malvern and Ledbury TICs, and websites of partner organisations
- a search for relevant initiatives and potential funding sources

2. Background

2.1 The Malvern Hills AONB

The Malvern Hills covers an area of 105 square kilometres, smaller than many other UK AONBs. The area includes not only the most obvious landscape feature of the ridge of the Malvern Hills but also gentle hills and woodlands, commons, pasture and arable land and scattered settlements including the village of Colwall. There is a strong contrast between the iconic and well visited hills (11% of the AONB) and the lesser known surrounding areas. The Malvern Hills Conservators own and manage the hills themselves funded through a local tax levied on residents and income from the car parks around the hills.

The Malvern Hills ridge forms part of the county boundary between Herefordshire and Worcestershire. There is also a small portion of Gloucestershire at the south of the AONB around Bromesberrow. This administrative division is unlikely to be perceived by visitors. In practice it makes managing the area more complex as there are many more stakeholder organisations – not just the local authorities but also tourism and marketing bodies, wildlife trusts etc which also tend to follow county boundaries. Having said this, there are a number of other AONBs which are also focused around landscape features which act as administrative boundaries, such as the Wye Valley, Cotswolds and North Pennines, so this issue is not unique.

What is more unique is the relatively small area of a well-known and accessible landscape feature which attracts a large number of people. There is a high number of people enjoying the hills in a relatively concentrated space. This is partly because of the towns and settlements located right at the foot of the hills themselves – especially Great Malvern and Ledbury. Also the high local populations in South Worcestershire, North Gloucestershire and South Herefordshire for whom the Malvern Hills is an obvious and desirable leisure trip destination within an hours drive. In fact the whole West Midlands conurbation is within 1-1.5 hours drive and an easy train journey from Birmingham, the Black Country or Hereford.

There are few other AONBs which receive such high levels of local usage by people living very nearby eg for regular walks, walking the dog and wanting access all day and all year, plus the high level of day visits (or half day visits) from a little further afield. The numbers of overnight visitors to the area, who would spend more in the local economy, are significant but overshadowed by this emphasis on day visits.

The quieter parts of the AONB are much less visited, although these contain the Worcestershire Way, Herefordshire Way and many lovely areas for walking, small villages, pubs and places to visit. The towns of Ledbury and Great Malvern are adjacent to, but outside, the AONB boundary. The area is comparatively wealthy – being on average one of the least deprived areas in the West Midlands. Property prices are relatively high and indicators reveal a high quality of life for local people. The quality of the environment is undoubtedly one of the reasons for this and is why the area attracts many people to live, work and visit.

2.2 Tourism in the Malvern Hills

There are no recent statistics on tourism in the Malvern Hills. The last competitive visitor survey was done in 1999-2000 by Heart of England Tourist Board (HETB). A previous (less comprehensive)

survey was completed in 1991 by a university student. HETB also completed an economic impact assessment for the AONB, Malvern and Ledbury area in 2000 using the data from the visitor survey that year.

The headline statistics from the HETB reports are:

| | |
|-------------------------------------|---|
| Overnight visitors | 137,000 (spending a total of 506,000 nights) |
| Day visits (over 3 hours) | 1,114,000 |
| Visitor spend day visitor spend) | £28,000,000 (roughly half and half overnight and |
| Local jobs supported | 940 |
| Serviced accommodation bedspaces | 1329 |
| Non serviced accommodation units | 448 |
| Spend per head/day (2000 levels) | £78 holiday visitors, £11.54 countryside day visitors |

This does not include numbers of local regular users for periods of under three hours. The HETB visitor survey gave a figure of 20% of visitors being people who live in the AONB, Ledbury or Malvern. This would imply the total number of visits being in the region of 1.5 million if 20% is added to the total of 1.25 million total above.

The visitor survey also revealed:

67% of day visitors are from Worcestershire, Gloucestershire and Herefordshire.

87% of visitors are repeat visitors

Most visitors spent about 3 hours in the AONB

Overnight visitors spent an average of 3-4 nights in the area.

82% of visitor use a car to reach the AONB, only 5% used public transport

67% said walking was the main reason for their visit, other key reasons were a countryside visit (26%) or peace and quiet (17%)

75% said walking was their main activity while in the AONB with 50% walking for over an hour. 43% visited a pub/café/restaurant and 18% took a picnic.

People particularly valued the scenery/views (47%), peace and tranquillity (16%) and walking/footpaths (16%)

People tended to visit in couples (39%), on their own (31%), family groups (19%) and adult groups (11%).

There was a general understanding that an AONB was a special landscape (92%) although only 7% gave the correct wording.

There are two large tourism businesses inside the AONB boundary which attract large numbers of visitors:

- The Three Counties Showground (on the east of the hills) which hosts many large and small events year round
- Eastnor Castle (on the west) a historic castle, open for visits six months of the year but also hosting major festivals, events and weddings year round.

Both bring in thousands of visitors for events but many of these do not spend time in the rest of the area while at the events.

The Malverns contain several business parks and hi tech research facilities which generate business related visits (8% of overnight visitors in the 2000 survey). There are also a significant number of independent schools which generate visits from relatives visiting pupils. The relatively populous surrounding areas also generate tourists from people visiting friends and relatives (27% of overnight visitors in the 2000 survey).

2.3 Previous Malvern Hills AONB tourism documents

The **Malvern Hills AONB Management Plan (2009-2014)** has a section on tourism, recreation and access under the Sustainable Communities heading. It lists the special features of the AONB and key issues affecting the AONB which relate to tourism. It sets out three guiding principles and five strategic objectives. There is also a vision for 2030:

Tourism

- The AONB is an exemplar of sustainable tourism, enjoyment and recreation, based on its rich natural and cultural heritage.
- The visitor experience is of a high quality and is open to all in society.
- Visitors' enjoyment and sustainable use of the AONB is well informed and respectful of local residents and land management practices.
- Local shops, pubs and farm gates serve a bounty of local produce, and tourism makes an increased economic contribution to the local economy.
- Tourism and visitor use respects and benefits natural assets, actively contributing to the positive state of the AONB and the natural environment.

The major piece of work done on tourism previously is the 2001 **Malvern Hills AONB Sustainable Tourism Strategy** produced by HETB in association with the University of Bristol. This used the data from the 1999-2000 research and a series of community consultation sessions to work up a substantial strategy document. It is an ambitious strategy – informed by the latest thinking at the time about sustainable tourism, including environmental monitoring techniques such as Limits of Acceptable Change.

The programme for action sets out ten objectives with a very strong emphasis on conservation and sustainability, more so than many sustainable tourism strategies written for AONBs in the last few years. The action plan lists 72 actions under seven headings for a range of organisations and

partners to implement. Local authority departments are listed as key partners to undertake many of the actions and yet it was noted in the report that few if any local authority officers had participated in the consultation meetings. They may well have been consulted separately but there is an impression that the strategy while very thorough and full of sensible suggestions was struggling to fully engage stakeholders.

Anecdotal evidence suggests that the process stirred up mixed feelings in local communities and businesses did not see the benefits in the strategy for themselves. In the event a follow up piece of work was undertaken in late 2001 more directly targeting the tourism business sector entitled **Realising the Value of the Malvern Hills**. This focused on realising the value of the Hills landscape to tourism in terms of it being the reason that many people visit and also on realising the value in terms of economic benefit to local businesses and communities and raising funds which help manage tourism's impacts. This document identified three overarching objectives and four or five areas for action under each – a much more focused approach than the strategy.

There was obviously a major focus on tourism from the AONB during the period between 1999 and 2001, which has diminished somewhat since. The clarity of thinking in the Management Plan may have been influenced by the tourism strategy and Realising the Value of the Hills documents. Specific work and activities undertaken since have fitted into the types of actions recommended, but have been rather ad hoc in nature. There was never the capacity to implement the strategy wholesale.

However, some obvious progress has been made in several key areas by the AONB and its partners. First time visitors may know little about the area but many will have heard about the Malvern Wells, taking the waters and the town's status as a spa town. The story of Malvern Water is obviously closely tied to the landscape from which it rises. However 10 years ago there was little to tell visitors the story and many of the wells and spouts were in poor condition or hidden and overgrown. Since then a major HLF project has achieved the restoration of many key sites, interpretation on site and a trail around key sites, plus training of local people. Despite the closure of the major Malvern Spring Water bottling plant a new enterprise based at Holy Well has emerged and is enabling visitors to taste bottled Malvern water and visit the historic Holy Well building. Thus one of the main unique stories of the area has been made more accessible to visitors – although some consultees said there was still some more joining up of the experience and promotion required.

The other key challenge which has faced Malvern is how to encourage more visitors to spend time in the town spending money as well as on the hills. The car park locations part way up the hills does not aid this. For some years local bodies have considered ways of making it easier to access the hills direct from the town and linking to public transport arrival points. This issue is being addressed currently through the Route to the Hills project led by Malvern Hills District Council. It is focusing on access, orientation, parking and signposting issues in Great Malvern. This project should make a significant contribution to addressing many of the concerns raised in previous documents, although some of the actions will take some time to implement.

On a less positive note the Hills Hopper bus which ferried visitors around the hills and was specifically geared to the needs of walkers has been terminated due to budget pressures.

In fact the current environment in 2012 is very different to that when the strategy documents were written. Local authority budgets have been cut and are still under extreme pressure. Visit England has been monitoring the impact of the economic recession which has reduced individual visitor spending but boosted domestic visits through the 'staycation' effect. AONB Partnerships are also under pressure of cuts from local authorities and Defra. Reflecting on the recommendations in the original Sustainable Tourism Strategy while significant progress has been or is being made in key areas, the scale of the activity is very daunting for an AONB with limited staff resources. Tourism partner organisations have changed dramatically in this time. New technology has also opened up additional opportunities for providing visitor information that were not foreseen a dozen years ago.

The final document it is useful to revisit is the Communications Plan produced for the AONB in 2007. Many of the recommendations in the plan were implemented soon after including a new logo, corporate identity and new media – such as an AONB website. Some actions were not implemented at that time and in particular communications with local businesses and visitors are relatively limited. A specific loss was the discontinuation of the visitor newspaper, although this was not commented upon by anyone. Some larger AONBs and National Parks still sustain such annual publications which can be a valuable way to reach a diverse visitor audience. It may be an appropriate time to revisit the communications recommendations and action some of those still outstanding such as more PR, displays and additional communication with partners.

3. The Current situation

3.1 The tourism policy environment

There is something of a vacuum in the tourism policy environment currently. Since the demise of regional government and Regional Development Agencies there is no regional body leading on tourism and the 2007 regional visitor economy strategy is no longer being implemented.

The responsibility for tourism at a county level has also shifted with local authorities cutting back their inputs and private sector bodies having to take on responsibility for leading on tourism issues and marketing. Herefordshire Council withdrew all funding for tourism and Visit Herefordshire is now a non profit making private sector body. Tourist information centres around the county are being run by local groups or town councils. In Ledbury a local cyber café has taken on the role. Destination Worcestershire has shifted from Worcestershire County Council and now comes under the remit of the Chamber of Commerce. From April 2012 it no longer receives WCC core funding.

Malvern Hills District still retains a tourism officer and runs the local TICs although savings are being made for example in co-locating the Upton TIC in the Pepperpot museum. Great Malvern's TIC remains but will be increasingly under pressure to generate income. Both Visit Herefordshire and Destination Worcestershire are finding their feet and both plan to develop new strategies and business plans over the next six months. Malvern Hills District are drafting a new Economic Development Strategy and plan a new tourism action plan to be written later this year linking to the new strategy.

The Local Enterprise Partnership (LEPs) for Worcestershire and for the Marches have said relatively little about tourism to date. Both have working groups on tourism which appear to be beginning to make more of an impact in recent months.

At a national level there is more guidance. Visit England published a new Strategic Framework for Tourism in 2011. This includes individual plans for sustainable tourism as 'wise growth' and for rural tourism. The rural action plan aims for 5% annual growth and lists actions under three objectives:

1. To diversify and modernise rural tourism products to generate business opportunities suited to local environments and communities and to develop a year round visitor offer.
2. To increase consumer awareness, understanding and enjoyment of the products and experiences available in rural areas.
3. To encourage rural communities and economies to benefit from the value of rural tourism by taking ownership for the development, management, protection and conservation of rural assets and locations.

The wise growth plan aims to balance growth aspirations with the principles of sustainability. Its objectives are to:

1. Embed the principles of Wise Growth into all Action Plans associated with the Strategic Framework for Tourism.

2. Embed the principles of Wise Growth into communications strategies with visitors and residents to enable them to cherish the places they visit, live and work.
3. Help tourism businesses engage in Wise Growth, by articulating the business case and providing access tools and resources.
4. Measure, report and communicate the impacts of Wise Growth transparently

National Policy has provided guidance on rural and sustainable tourism. Local tourism strategies are about to be re-developed which provides an opportunity for the AONB Partnership to engage and influence this process.

3.2 Research data

There has also been a relative vacuum in terms of tourism research since demise of HETB and more recently AWM. The exception to this is the recent study funded by the Marches LEP which commissioned research by Arkenford using their well-established tourism model into visitor perceptions of Herefordshire, Shropshire and Telford/Wrekin.

The Marches LEP has also commissioned a study into hotel supply and demand. This will be similar to the study undertaken in 2009 by Humberts Leisure for South Worcestershire. These studies review current supply of bedspaces and identify any potential gaps which could be of interest to new developers.

Worcestershire LEP is considering commissioning research such as a new visitor survey and an economic impact of tourism study. Visit Herefordshire also mentioned plans for a visitor survey.

The Arkenford perceptions research is interesting. It includes information on the swiftly changing habits of visitors and how they seek information on destinations. Levels of usage of the internet are now around 90%, over 50% of visitors use social media and the importance of having good websites and mobile version of these is reinforced by the findings.

Visitors ranked landscape as a very important motivator but unfortunately the research did not use 'the Malvern Hills' as one of the identities tested – a missed opportunity. The model includes eight categories of visitor and the research identified the three main types attracted to Herefordshire – Cosmopolitans, Traditionals and Functionals. The characteristics of these groups are spelt out in details to help gain an understanding of what these groupings are looking for from their visits. The research reveals how visitors value landscape, towns and villages and local heritage. Food and drink such as traditional pubs are important and walking comes out very strongly as the most popular activity – including all types and lengths of walks. Herefordshire scored particularly well for food and drink and outdoor activities. Areas of Natural Beauty (sic) were ranked highest (89%) when people were asked what type of place they enjoyed exploring.

Current research is lacking. Organisations are still dependent on out of date statistics. What data there is indicates how important the landscape is for visitors and reinforces the value of the AONB's special features such as heritage and food and drink. There are plans for more research which could

provide a good opportunity for the AONB to ensure the data gathered is pertinent to the Malvern Hills.

3.3 Partner working

As the AONB has just limited staffing, the working relationships with partner organisations are important. Influencing, facilitating and supporting partners' activities is one way of achieving progress. The AONB appears to have a strong relationship with the Malvern Hills Conservators, with whom they share an office. A new Director is about to take up post at the Conservators. The AONB staff will also have good relationships with officers at the four local authorities. However as tourism staff at local authorities are depleted or responsibilities transferred across to private sector organisations there is a risk that liaison on tourism issues could be weakened. This may particularly be so as the new tourism partnerships are more focused on marketing their members and are likely to spend less time on product development which often falls into the economic development or regeneration remit in local authorities. As the AONB has not engaged in much promotional activity in the past there may appear to be less cross over in activities. There is a danger that less joint working could result.

Visit Herefordshire and Destination Worcestershire are still new organisations finding their feet. There are also recent changes at the town level with the Ledbury tourism group trying to support the new TIC and involved in the recent fight against an out of town supermarket. In the Malverns there is a new chair of the B&B Consortium who has rejuvenated the group. The AONB has had little contact with the town groups in the past, neither have the Conservators.

It may be that one reason for limited contact between management organisations and tourism bodies is that the former feel there are enough visitors currently and there is no need to promote the area to more. There may need to be a deeper understanding that the tourism bodies are promoting the area to people primarily for overnight stays which will generate most business for their members. It is also in the interests of the area that these visitors seek out information from official websites and from staff at businesses. They will understand more about the area and have better information. Arguably it is the visitors from the local region who do not have contact with any organisation for information before or during their visit which are likely to cause the most problems.

There has been a lack of co-ordination in the way in which tourism initiatives are taken forward, partly due to the divided geography and partly due to the changing environment. There is a significant opportunity over the next six months or so to strengthen relationships with bodies involved in tourism locally, improve communications and understanding and forge co-operative ways of working. It may be possible for all the partners to sign up to some agreement over how the area is promoted and managed for all types of visitor.

3.4 Recent tourism related work

AONB staff feel their work in tourism over the last few years has been somewhat reactive and ad hoc. A number of Sustainable Development Fund tourism projects have been grant aided including bike hire, green accommodation and information on public transport. SDF grant applications will usually be reactive in nature.

The AONB has published a number of walking and cycling trails around the AONB, themed trails such as a literary trail and one round local churches and churchyards. The team were also heavily involved with the HLF project which restored wells, springs and spouts and published a trail to help people explore these. Some effort has been put into publicising public transport options for reaching the hills. These are all available on the AONB website.

The team worked with the Three Counties Showground to produce walks from the site in an attempt to encourage people to stay longer and explore the local countryside, but without moving their cars from the showground. They have also assisted Herefordshire Council in creating more easy access routes without stiles in the Colwall area. The AONB has supported Malvern Hills District in trying to recruit accommodation businesses into the Green Tourism Business Scheme.

Most recently the AONB has been involved in two new projects which could have significant impact. Firstly the use of QR codes to deliver information to visitors at a range of points around the area via their smart phones. Now that smart phone usage has risen so rapidly this will prove very useful and could be extended in future. Secondly commissioning a map based leaflet of the AONB area, promoting things to see and do. This leaflet will be one of very few publications which has the AONB as its focus. Too often the Hills are at the edge of a map of Worcestershire, Herefordshire or Gloucestershire. Visitors who come to explore and walk need information which covers the whole AONB and the towns serving it. The new publication is likely to prove very popular and useful.

The concern is that the rationale for getting involved in some of these projects is not clear. Should there be a more proactive approach to tourism related projects? And if so which type of activity should be the priority?

3.5 Current and future tourism trends

A number of trends affecting the Malvern Hills were reported by consultees and through conversations at the TICs. For example:

- Walking is increasingly popular
- Mountain biking is also increasing and likely to continue to increase which will generate more conflicts with other users.
- Some anecdotal evidence of more visitors from the Birmingham area and also Eastern Europeans – presumably many working locally in the area
- A loss of some smaller, older hotels and guest houses but the number of B&Bs has been seen to increase with many new entrants to the business
- Anecdotal evidence of people becoming more aggressive in attitude for example if approached by a warden on the hills.

Visit England research reports highlight key trends during the last decade including:

- New technology – people are increasingly networked with each other depending on mobile phones and the internet for their information and interactions with others.
- Visitors wanting to buy ‘experiences’ rather than simply leisure products and services
- The importance of wellbeing – including physical and mental health

- Changing social structures – with more fragmented families, an ageing population, more people living on their own – changes leisure dynamics and makes social motivations for leisure more important
- Entitlement – rooted in the human rights movement and public policy, people are increasingly feeling more entitled, and this applies especially to leisure and culture
- Climate change – a continuing shift in business practices and public behaviour to less environmentally damaging activities.

Visit England undertook consumer research into attitudes to sustainable tourism in 2010. Given the AONB's focus on sustainable tourism it is worth quoting the summary findings at length:

Levels of past participation in overtly sustainable holiday types in England are relatively low (7% ever taken a volunteering holiday, 13% stayed in accommodation with green awards or environmentally friendly practice). Nonetheless, there is a considerable degree of broadly sustainable behaviour on holiday – 49% claim to have learnt something about the place they stayed in, over 40% have used public transport either to get to the destination or once there, and around one in three have taken holidays off the beaten track or taken part in walking/cycling/other outdoor activity holidays.

There is also evidence of interest in a greater degree of participation in sustainable break types in the future. Over half expressed an interest in staying in accommodation with environmentally friendly practice, and a similar number are interested in breaks which benefit the local community. Interest in sustainable holiday behaviour is greatest among younger age groups.

The majority of consumers are happy to accept “functional” sustainable elements such as reusing towels, and accepting a room with a shower rather than a bath. Over half would choose accommodation supplying local food, or accommodation with a green award, if two hotels were otherwise the same, and a similar proportion say that they like to know that accommodation is doing its “bit” for the environment. There is little disagreement with these statements, but the relatively high proportion of neutrals – people neither agreeing nor disagreeing - suggests a lack of knowledge / experience among many consumers. Positively, only 15% believe that a hotel run in a sustainable/green way is likely to be less comfortable than one without any green credentials.

A majority claim that they would be more likely to use public transport to travel to their destination and / or travel around when on holiday if sufficient incentives were available (reduced cost / greater convenience / better information) – though travelling by bicycle in destination would remain a minority pursuit, even if bikes were available.

While people are happy to engage in sustainable behaviours on holiday, they don't necessarily want to “work” at being green – just under half agree that “I don't want to have to think about being green (on holiday in England), I just want to relax.” Clearly, tourism businesses need to make it easy for visitors to behave in a sustainable way without this in any way detracting from the holiday experience.

Visitor motivations and behaviour are changing quite rapidly. New technology has been the largest influence but there are also gradual shifts in attitudes to sustainable forms of tourism. All these trends need to be considered when new initiatives and projects are being developed.

3.6 Current and future issues in the Malvern Hills

Concerns have been raised in many quarters about issues which are affecting the AONB area. There is not space here to go into detail but the main issues raised during consultations include:

- The lack of a clear policy position on tourism from the AONB and the Conservators
- The area being split between three counties affecting the way it is promoted. Visitors don't gain an understanding of the whole area and businesses feel marginalised on the edges of county marketing areas.

- This division of the area also means there is a less co-ordinated approach to tourism initiatives which affect the area
- Concern that the carrying capacity of the hills is being reached
- The mixed views on sustainable tourism – what it is, how to promote it and how appealing the product is to visitors. The low take up locally by businesses of sustainable initiatives such as the Green Tourism Business Scheme.
- The potential impacts of new housing being built in nearby areas – for example there are plans for another 24,000 houses in South Worcestershire.
- Impacts of events such as mass sponsored walks along the ridge of hills – there are about 35 of these each year.
- The large numbers of visitors to the Hills and to big events at the Showground and Eastnor Castle who don't then visit anywhere else in the AONB and don't contribute to the local economy.
- The levels of complaints from the public about management issues on the hills. The top complaint the Conservators receive is about inappropriate mountain biking, closely followed by dog mess.
- The challenges of trying to communicate about management measures such as grazing regimes and tree felling.
- Current agricultural policies and their impacts on farming which may lead to more farmers looking to diversify into tourism.
- A loss of tranquillity due to increasing numbers of people using the hills.

4. Best practice in tourism in UK AONBs

A brief review of what other AONBs are doing on tourism provides examples of best practice and options which the Malvern Hills AONB Partnership could consider. The review includes examples from around the UK but draws particularly on the Wye Valley, Shropshire Hills and Cotswolds – three nearby AONBs which have been relatively proactive. All have significantly larger teams than the Malvern Hills.

Areas with little action on tourism

Some AONBs have not been particularly active in tourism. Some are reported to feel their countryside is already under too much pressure. An example of this might be the Gower which does not have its own website or much visitor information. Others may feel that their local economies are very buoyant and there is no particular economic need for additional income to the local rural economy. An example of this might be Surrey Hills AONB. There is reference to the large (unknown) volume of visitors which the area receives compared with other south eastern AONBs such as the Chilterns and Sussex Downs (now part of the South Downs National Park). The website includes lots of useful information for visitors but it is clear from the working groups listed that there is more focus on management than promotion. A particular activity of interest is the Surrey Hills Mountain Biking Working Group. This has been established to progress the proactive management of mountain biking and brings together a group of landowners, access managers, users and businesses. This might be a useful model if mountain biking in the Malvern Hills is thought to need a similar approach.

A question raised by this example is whether there is evidence of local businesses not wanting or needing additional revenue from visitors. In the Malvern Hills it may be possible to do a survey of local businesses to identify which sectors most need the additional income from visitors and prioritise actions accordingly.

European Charter and Sustainable Tourism Strategies

At least ten or more AONBs have taken a very proactive approach to tourism. This can be seen in their applying for the European Charter for Sustainable Tourism in Protected Areas. This scheme is run by the Europarc Federation which represents the 430 protected landscapes across Europe. Five UK AONBs have the status already and five more are currently applying:

Have Charter status

Cotswolds
Clwydian Range
Forest of Bowland
Cornwall
Mourne

Applying 2011/12

Shropshire Hills
Kent Downs
Arnside and Silverdale
North Pennines
Northumberland Coast

There are also six National Parks with the status and another applying. Across Europe 89 protected areas have qualified for charter status. The application is a relatively onerous process – it requires drawing up a Sustainable Tourism Strategy – of the scale of the MHAONB 2001 document. It requires there to be a partnership or forum which has been involved in the process and is signed up to deliver

the action plan in the tourism strategy. There is a thorough assessment of applications and members have to reapply every five years. There are also application and membership fees. The Wye Valley AONB intends to apply next year and has completed its Sustainable Tourism Strategy.

The key principles of the European Charter provide an indication of its scope. They could also act as a possible framework or set of principles for the Malvern Hills area to work towards, whether or not an application for Charter status is pursued.

Charter Principles for Sustainable Tourism

- 3* To protect and enhance the area's natural and cultural heritage, for and through tourism, and to protect it from excessive tourism development** by:
- monitoring impact on flora and fauna and controlling tourism in sensitive locations
 - encouraging activities, including tourism uses, which support the maintenance of historic heritage, culture and traditions
 - controlling and reducing activities, including tourism impacts, which: adversely affect the quality of landscapes, air and water; use non-renewable energy; and create unnecessary waste and noise
 - encouraging visitors and the tourism industry to contribute to conservation
- 4 To provide all visitors with a high quality experience in all aspects of their visit**, by:
- researching the expectations and satisfaction of existing and potential visitors
 - meeting the special needs of disadvantaged visitors
 - supporting initiatives to check and improve the quality of facilities and services
- 5 To communicate effectively to visitors about the special qualities of the area**, by:
- ensuring that the promotion of the area is based on authentic images, and is sensitive to needs and capacity at different times and in different locations
 - providing readily available and good quality visitor information in and around the area, and assisting tourism enterprises to do so
 - providing educational facilities and services that interpret the area's environment and heritage to visitors and local people, including groups and schools
- 6 To encourage specific tourism products which enable discovery and understanding of the area**, by:
- providing and supporting activities, events and packages involving the interpretation of nature and heritage
- 7 To increase knowledge of the protected area and sustainability issues amongst all those involved in tourism**, by:
- providing or supporting training programmes for staff of the protected area, other organisations and tourism enterprises, based on assessing training needs
- 8 To ensure that tourism supports and does not reduce the quality of life of local residents**, by:
- involving local communities in the planning of tourism in the area
 - ensuring good communication between the protected area, local people and visitors
 - identifying and seeking to reduce any conflicts that may arise
- 9 To increase benefits from tourism to the local economy**, by:
- promoting the purchase of local products (food, crafts, local services) by visitors and local tourism businesses
 - encouraging the employment of local people in tourism
- 10 To monitor and influence visitor flows to reduce negative impacts**, by:
- keeping a record of visitor numbers over time and space, including feedback from local tourism enterprises
 - creating and implementing a visitor management plan
 - promoting use of public transport, cycling and walking as an alternative to private cars
 - controlling the siting and style of any new tourism development

*Principles 1 and 2 refer to the need for a partnership and strategy.

Position Statement on Tourism

Some AONBs, such as the Shropshire Hills, have developed a position statement on tourism as a starting point. This can be a short document of a few pages setting out definitions, key features of

tourism in the area and some specific policies. In the Shropshire Hills this was shared with partners who agreed the document and it formed the basis for more significant changes to the Shropshire Hills Management Plan, which had previously not featured tourism much at all, before moving to a full tourism strategy. Arguably the Malvern Hills are beyond this stage as there are some significant sections in the Management Plan already and it may be more appropriate to simply revisit and review these rather than develop an alternative document.

AONB Tourism groups and forums

Several AONBs have established a group in which to discuss tourism issues. The Wye Valley has a Tourism Liaison Group which meets about three times a year involving tourism officers from all the districts/counties, key stakeholders such as the Forestry Commission and local business groups. The group includes an exchange of information, updates and also agrees action on any cross area initiatives.

The Shropshire Hills established a tourism sub group which worked on a similar basis. This has since been superseded by a destination partnership which includes the whole AONB, plus surrounding market towns. The AONB decided to play a lead role in establishing this partnership alongside the development of the Sustainable Tourism Strategy and the partnership is now the group which is tasked with delivering the destination and AONB strategy.

The Forest of Bowland AONB has a Sustainable Tourism Forum once a year targeted at partners and local tourism businesses.

The key issue is what the role of the group should be – is it purely information sharing and communicating with local businesses – in which case a forum type event, even a tour of new facilities and presentations/updates could be popular. Alternatively if it is more of a working group to drive forward some joint projects then more regular meetings with a tighter group of people would be better.

Our Land

Our Land is a major collaborative project funded through the RDPE with £1m over three years which launched in 2011. It aims to develop and promote sustainable rural tourism in the National Parks and AONBs of South East England, mainly through a national marketing campaign and sophisticated web platform www.our-land.co.uk. The focus of the campaign is to celebrate the diversity and distinctiveness of the landscapes. The campaign also involves a commercial partner www.responsibletravel.com.

Stated objectives include:

- To increase visitors' enjoyment and understanding through knowledge of the special character
- To benefit the local rural economy and services – increasing visitor spend and stay
- To develop and promote responsible and sustainable rural enterprises and entrepreneurship
- To encourage responsible developments that promote conservation and enhance landscapes

The attractive and flexible website allows people to browse through a range of products and offers and buy online.

On offer are visitor experiences in the AONBs and National Parks that:

- Put the stories of the landscape at the heart of the offer
- Enable visitors to interact with the landscape – e.g. nature walks, wildflowers, bird watching, cultural history
- Provide and promote local foods
- Include short break experiences, themed promotional offerings
- Place a value on conserving the landscapes
- Promote the owners as experts and ambassadors for special places
- Are targeted to a wide range of markets

The initiative has a team of ‘field experts’ mainly from the protected landscape themselves and a team of business development managers who work with the businesses which are accepted onto the website. Each business has to make a ‘promise’ in which they describe how they sustain their environment, support their community and share their knowledge of the landscape. The team of staff work with businesses to make sure they can deliver on the promise and ensure an interaction with the landscape’s wildlife, people, history, buildings and food. Social media elements allow people to share their experiences and to ask questions about the area to a panel of local experts; including historians, conservationists and walking and cycling experts

In the Government’s autumn statement 2011 it was announced that Defra will provide up to £1m to AONBs for a new Sustainable Tourism initiative in North East England based on the Our Land approach. Further details are due to be published later this year. There has been speculation that the approach may be spread across the whole country but presumably this will not be until after the NE phase is up and running which will be at least 12 months or more.

Sense of place

Work on sense of place has become increasingly topical in the last few years. In Wales a major Sense of Place initiative is being launched currently trying to engage tourism businesses in communicating with their visitors about local distinctiveness.

An early initiative was the Forest of Bowland Sense of Place Toolkit which started in 2005 www.forestofbowland.com/bn_sop. The toolkit is in its third reprint as it has proved so popular both locally and further afield where it has inspired their areas to take a similar approach. In Bowland the key features of sense of place have been defined under a set of themed headings:

- A place to enjoy and keep special
- Delicious local food and drink
- A landscape rich in heritage
- A living landscape
- Wild open spaces
- A special place for wildlife

The toolkit contains information about each theme plus text and images which businesses are encouraged to use freely in their own publicity, website and leaflets.

The Shropshire Hills set up a simple resource of photographic images which can be used by businesses which are members of their Sustainable Business Scheme. In addition they have run business workshops to enthuse local operators about the special qualities of the area and discuss ways in which to harness this in business ideas and promotions.

Visitor payback

Encouraging visitors to contribute into conservation and management funds via visitor payback schemes is tricky. The most successful schemes have been operated on significant budgets in areas such as the Lake District and Peak District National Parks. Recently the Cotswolds AONB was considering setting up a scheme but has postponed the research with businesses which would have initiated the work. While there are examples of individual businesses which are confident taking a contribution from their visitors for conservation causes, many are still very wary and feel it will put people off and make them less competitive. One of the few AONB examples is the Forest of Bowland, which operates its Bowland Tourism and Environment Fund www.bowlandtefund.org. All donations to the scheme directly fund environmental projects within the AONB. The Fund is set up as a social enterprise charity with trustees from local businesses. Postcards, pin badges and donation boxes are available at selected businesses and information centres in the AONB. Funds raised are distributed via grants of up to £500 to local projects. The Fund also benefits from any profits earned by its trading subsidiary, Bowland Experience Limited (BEx). BEx provides a vehicle for collaborative marketing and promotional activity by tourism businesses across the AONB.

Websites

Most AONBs have a website. Some are much more visitor orientated than others. Good examples include the Forest of Bowland www.forestofbowland.com, Clwydian Range www.clwydianrangeaonb.org.uk and North Pennines www.northpennines.org.uk. Forest of Bowland has a large section under 'enjoying' which includes accommodation, events, a range of activities and places to eat. Of particular interest is the travel information which highlights special visitor oriented bus services and a range of information sources, and also the walking routes which are plotted onto an interactive map with a series of good pdfs that can be downloaded.

Cotswolds AONB has gone as far as to develop a separate linked website for visitors on www.escapetothecotswolds.org.uk. Escape to the Cotswolds is attractive and easy to navigate. It has upcoming events, weather forecast and latest news all on the home page, plus an invitation to sign up to a newsletter. The main sections of the site are walking, cycling/riding, events, things to see and an online shop. The walking pages are extensive with information on guided walks, downloadable walks including car free walks, walking for health, walking holidays and walkers are welcome. The information is well organised and attractively and consistently presented. The online shop is an interesting element showcasing guidebooks to the area and walking, cycling books and maps. The links are direct to the Amazon website where people can buy the books. For each order placed via the AONB website a small donation from the amount goes back to the AONB. So benefits are better informed visitors and a financial contribution to the AONB.

Promotional print

Most printed publications produced by AONBs are interpretive or informational in purpose. There are some examples, however, of print which aims to attract more visitors to the AONB. One example is an A4 brochure produced by the Clwydian Range AONB in 2011 entitled 'Capturing the Clwydian Range- an outstanding landscape to discover'. This 16 page (32 including Welsh) publication introduces itself as a 'new-look magazine' celebrating 'some of the things we love about the area'. It features food and drink, articles on specific heritage and monuments, family walks and an article featuring several local accommodation providers. As the publication has been distributed well beyond the AONB boundaries it is presumably designed to attract additional visitors, as well as to inspire visitors who are already in the area.

Awards

Several AONBs have awards schemes – most focus on land management or sustainability. The Northumberland Coast has AONB Awards for Excellence which are awarded in various categories including building design, farming and land management and sustainable tourism. In 2011 three accommodation businesses won or were highly commended for integrating sustainable practices into their businesses. Similarly the Shropshire Hills gives awards within its Sustainable Business Scheme and generates good PR and networking at the awards event.

Landscape Partnership Schemes

The Malvern Hills itself has had an HLF funded Landscape Partnership which focused on the restoration of the wells, spring and spouts around the hills. Other significant AONB hosted LP schemes include the Blue Remembered Hills in Shropshire, Hillforts and Heather in the Clwydian Range and Overlooking the Wye in the Wye Valley. The latter scheme is just finishing and has produced a range of promotional materials bringing together the findings and outputs of the project into trails and guides. Such projects are major undertakings involving an extensive funding application and year of development work before the scheme can commence. However they attract significant funding and staff resources to deliver a programme of activities. When hosted within an AONB the project can generate considerable synergies and added value (as well as additional administration and management).

LEADER projects

In the West Midlands the current round of LEADER (European rural development) funding has not included tourism projects within eligible activities. In the rest of the UK many tourism projects have been funded over the last few years. It is likely that with the demise of Regional development agencies any future LEADER funding programme will include economic and tourism actions.

North Devon Coast AONB received LEADER funding to set up its new 'Explore the North Devon Coast' website explorethecoast.org/home. This includes an interactive map and there is a smart phone app in development which links to the site. The website aims to encourage both local residents and visitors to better understand and appreciate the area's heritage, leave the car behind, and explore the coast around them from a fresh perspective. The innovative element is that the project is involving local communities and providing opportunities for them to contribute their knowledge to the website, plus post reviews and comments. The site is targeting local people as much as visitors.

The project was supported by previous consultation with local residents and businesses which revealed a desire for:

- Greater information about the environment and heritage in the North Devon coast.
- Information on free activities in the AONB especially for families.
- Measures to encourage people to visit places beyond the main tourist 'honeypots'.
- Initiatives encouraging people to reduce their car use.

This type of approach involving local people and providing ideas for leisure trips for families might be particularly appropriate for the Malvern Hills.

Other activities

Other tourism related activities which some AONBs have focused upon include producing extensive **events** listings for their area – either printed and/or online. For example the Shropshire Hills brings together all the mainstream tourism events in the area with all the guided walks and activities organised by the National Trust, Natural England, Shropshire Council and the AONB itself. These are presented in an attractive annual booklet with introductory sections about the AONB, its landscape and heritage.

Walking has been the focus of activity in several AONBs. Notably the current Walking With Offa programme which involve the Wye Valley, Clwydian Range and Shropshire Hills AONBs along with the Brecon Beacons National Park. A series of funding bids to English and Welsh agencies, and in particular a recent LEADER co-operation bid, are funding a range of activities to improve walking infrastructure, research and publicise circular walks, especially some from pubs and cafes, and train guided walks leaders and tourism businesses. In several areas tours, walks and trails are available in audio downloads as well as maps. For example Clwydian Range has produced some interactive audio heritage trails www.clwydianrangeaonb.org.uk/visiting . A series of podcasts have been developed for Offa's Dyke and the Shropshire Hills www.shropshirewalking.co.uk/walking-podcasts.php .

The Clwydian Range has also been active with **public transport**. The AONB liaises with transport planners and operators about local bus services and specifically promotes a summer shuttle bus between Loggerheads and Moel Famau country park. The Norfolk Coast AONB has helped establish the successful Coasthopper bus service www.coasthopper.co.uk/ and the Gower Explorer bus service is also very popular. Bus services are of course easier to support when the geography is simple like a coastline location. One further example of an innovative approach to encouraging visitors to travel by public transport is the Thames Path national trail travel planner website www.cartogold.co.uk/nationaltrails/thamespath.htm which has an interactive map with all the train, bus and boat services and timetables integrated so that people can plan their journeys to reach the national trail to walk a section of it.

Many AONBs now use **social media** to communicate to interested people – Twitter 'followers' or facebook 'friends'. North Pennines AONB has 1,500 twitter followers and also has links to videos on you tube explaining about projects and special features of the landscape. This is a new technology version of having a 'friends' group. It is a good way of publicising information about up and coming

events, to post alerts about urgent issues and to communicate with interested individuals. It is also an excellent way of engaging with tourism businesses which use social media.

5. Options for the way forward

A range of options have been emerging from the analysis above that the Malvern Hills AONB could consider taking forward. There seems to be a desire to re-frame the tourism agenda for the area and this would be a good time to embark on this due to the changing policy and organisational environment.

The options fall into six areas:

1. Policy
2. Communications
3. Partnership working
4. Research
5. Delivering projects/actions
6. Developing future prospects

Most of these are interdependent, for example policy should be informed by research and partnership working is dependent on communications. The projects and actions should be dependent on policy priorities and may be pursued through partnership working. Similarly future prospects for more ambitious plans, possibly with external funding, could be worked up based on new research and working with partners.

The six areas are outlined in more detail below. Specific opportunities are summarised in tabular form with possible pros and cons and potential cost implications in section 6.

5.1 Policy

5.1.1 Clarify the AONB's policy/stance on tourism.

Partners would find a clearer message helpful and an agreed policy would help AONB staff decide on priority of other tourism related activities. This could be done during the review of the Management Plan – a new /revised plan is due in 2014. However it would be beneficial to establish a position on tourism earlier than this so developing a position statement or agreeing some key principles could be done sooner and lay the foundations for a fuller consideration in the Management Plan.

Within this process the AONB should consider how to define sustainable tourism. The AONB's interpretation has been more strictly defined than many other areas and it may be beneficial to relax this. While the AONB is in a good position to lead on sustainable actions very few businesses in the area have taken steps in this direction and visitor awareness is still relatively low. More may be achieved by working flexibly and pragmatically on tourism which has benefits for the local economy, environment and community, while exerting influence to increase sustainable actions by all stakeholders – businesses, tourism bodies and visitors.

If a significantly more positive and proactive stance is agreed then the AONB Partnership may decide to invest more resources in promoting the Malvern Hills as an AONB, working through partners and producing more publications or promotional media itself.

5.1.2 Sustainable tourism partnership agreement/memorandum

A further option would be to undertake drafting a position statement or sustainable tourism policy in partnership with other bodies such as the Malvern Hills Conservators and local authorities/tourism organisations. This would have the benefits of a shared policy and understanding and the discussions would help to understand the relative roles and priorities of each organisation. The Malvern Hills Conservators in particular have indicated an uncertainty about their role with tourism since they were given no remit for it in the original Government Acts. They may be considering their role and whether they could set up a trust which could be more active in a direct visitor facing role. However working up a joint statement that all are able to sign up to could be a much longer process and might run into problems if there are individuals who do not see the benefits of a joint approach.

5.1.3 Develop a Sustainable Tourism Strategy

The AONB could commission (or work up in house) a tourism strategy. This could include engaging partners and businesses and agree a programme of action which all could work towards. It would be useful to back up future funding bids. However there appears to be little appetite for this immediately. Partners are themselves only just working up their own strategies and working practices. They seem to prefer a focus on practical actions at the moment while resources are stretched. It may be more beneficial to embark on a strategy in a few years' time – perhaps as an action emerging from the 2014 Management Plan. This could then lead on to an application to for European Charter status. It would be worth canvassing the benefits of charter status from other AONBs over the next few years to help decide whether this would be worth pursuing.

5.1.4 Develop a visitor management or recreation strategy

Discussion with other partners, and with the Conservators in particular, may lead to the conclusion that what is required is a strategy just for the central hills area which focuses on visitor management and/or managing recreational use of the hills. Such a strategy might include setting up groups to address issues such as mountain biking, involving user groups. It could include monitoring of visitor numbers, behaviour and environmental impacts. Again it may be that this topic should be integrated into the review of the Management Plan – either leading up to the new version or as an action to be implemented in the longer term.

5.1.5 Influence partners' tourism and marketing strategies

New tourism and marketing strategies and plans are in the early stages of preparation at Visit Herefordshire, Destination Worcestershire and Malvern Hills District Council. The AONB should ensure that it is well profiled in these documents and play an active role in inputting to the strategies, especially in terms of sustainable tourism and how the quality of the environment is crucial for area's distinctiveness and quality of life and therefore business and visitors.

5.2 Communications

5.2.1. Raise awareness of the AONB

One of the key roles of the AONB is to communicate to a range of audiences about the special features of the area. This action should probably run throughout the AONB activities and interactions with other bodies and individuals.

5.2.2 Update AONB Communications Plan

This may be a good time to revisit the 2007 Communications Plan and agree a refreshed set of updated priority actions for the next few years to build up the profile of the AONB. This could include several of the following options.

5.2.3 Review and extend AONB website

The AONB website is a key communications tool. While the existing site functions well there is scope to expand and reorganise information for visitors, ensure the site links to and has links from other visitor sites and potential to include more functions such as an interactive map, podcasts and social media links.

5.2.4 Increase outreach

This would include attending more partner events and meetings to promote the AONB and its work. Tourism bodies hold forums once or twice a year and invite partners to take a stand and distribute leaflets. There are tourism sub groups at LEPs and working groups in local authorities/tourism bodies. Local business groups such as the Malvern B&B Consortium and the Ledbury Tourism Group hold meetings and would welcome a speaker from the AONB every year or so. The new map and/or position statement could be used as a mechanism to engage with any of these groups. Attendance at more meetings and events will improve communications, relationships and could lead to new ideas and collaborations. Given that regular attendance would be difficult to sustain it will also be useful to request to be circulated with the minutes of all the relevant groups and reciprocate with information and invitations to attend relevant AONB meetings and events.

5.2.5 Increase PR activity

The AONB currently issues occasional press releases. This activity could be increased to feature more aspects of the AONB's work and more projects which have been awarded SDF grants. This will largely target the local audience of regular users and day visitors. Specific local media could be targeted and relationships with key staff strengthened for example by inviting a journalist/ editor to visit the AONB/project.

5.2.6 Establish an AONB 'presence' at key location(s)

The new AONB map leaflet presents an excellent opportunity to have a version produced at a larger size as a poster or wall display. Local TICs might welcome a permanent or temporary display incorporating the map and leaflet dispensers for other AONB publications. There may be other locations which could include such as display on a permanent or temporary basis for example local libraries, leisure centres, the Three Counties Show ground or Eastnor Castle.

5.2.7 AONB map poster

A poster style version of the new map might be very popular for accommodation businesses and attractions to have displayed permanently. (The Brecon Beacons National Park subsidise a standard map of the National Park which is displayed widely throughout the area to help visitors plan their visits.) This could be given free of charge to interested businesses (which might then need to have it framed) or possibly sold for a small fee to cover printing costs.

5.2.8 Use social media

Using social media requires someone who is interested in setting up and then regularly maintaining AONB activity. A first step would be to monitor how other AONBs and local partners use facebook and twitter and assess the way Malvern Hills AONB could use the media. Once established it requires regular but quick updates. If more effort is invested and the number of followers and friends is boosted significantly it could become a very significant low cost form of communication.

5.2.9 AONB E-newsletter

The AONB issues an email newsletter to partners periodically. A version for consumption by a wider audience could be compiled. This could be sent directly to specific email lists such as local tourism businesses. The website could invite people to sign up to receive the newsletter. It could also be linked to social media updates.

5.2.10 Promotional media

Publishing more promotional literature, either independently or in partnership with tourism bodies and local businesses, would send out a stronger message to attract more visitors of the type who appreciate special landscapes and will spend more time and money in the area. Key issues are the costs of print and distribution. Printed publications are becoming superseded by online technology and some destinations are deciding to either downscale quantities or not produce a printed brochure at all. Visit Herefordshire is moving in this direction for example.

Other media such as commercial advertising is notoriously costly and difficult to monitor. Other options might include using video clips in association with social media. Professional marketing advice (including that at the local tourism bodies) could help identify the most effective methods should the AONB wish to explore opportunities.

5.2.11 AONB boundary signs

There are mixed views about whether installing AONB boundary signs would be a good way to raise awareness of the designation. Some roads are not very suitable as they enter and then leave the AONB within a short distance. Also there is a reluctance to add to road signage clutter, even if the signs were made of a more sympathetic design and materials. There are few options for siting such signs in the north of the AONB; the most likely locations appear to be where the roads from Ledbury and Malvern head into the AONB and also on roads at Welland and Hollybush where they enter the AONB from the east and south east.

An alternative option which would not involve additional signs would be to invite villages within the AONB to include the AONB logo on their village welcome signs, either on an ad hoc basis or by having a design drawn up and a new set of signs produced (which would be expensive).

5.2.12 Sustainable tourism awards

Setting up an awards scheme would be an opportunity to showcase and celebrate the efforts made by local tourism businesses. It would inspire and encourage more businesses to consider such actions and would strengthen the area's profile for green tourism. The award could be very simple – one award and runners up each year, or could include different categories to spread the attention further. It would need to be backed up by good PR.

5.3 Partnership working

5.3.1 Strengthen partnership working

Much can be achieved by supporting and adding grist to partners' initiatives which are in line with AONB policies. Thus it is important to communicate effectively and discuss future joint working and ideas. Better communication will mean partners are likely to feature the Malvern Hills more and in a way that ties in with AONB priorities. As noted above this is a good time to develop new relationships given recent organisational changes and planned strategy developments.

The AONB should aim to build confidence through communication and partnership working. There is also the potential that some of the new tourism bodies may struggle due to funding challenges. In some areas such as the Shropshire Hills this has created a vacuum and the AONB has taken a more central role in local destination planning and promotion. Developing good relationships and greater awareness would lay the foundations for potential greater involvement if appropriate.

5.3.2 Establish a tourism forum or liaison group

In addition to attending more of other organisations meetings the AONB could establish its own tourism or tourism and recreation working group, liaison group or forum – as described in section 4.

5.3.3 Join tourism organisations and participate

Visit Herefordshire and Destination Worcestershire may suggest that the AONB join as a member in order to be able to have leaflets racked and have a stand at the annual forum. Membership costs a small annual fee but would show commitment and buy into the organisations' activities more directly. Options might include better coverage of the AONB on websites, reciprocal web links and distribution of the new AONB map and other publications.

5.3.4 Support partner funding bids/projects

Tourism partner organisations will periodically lead projects and funding bids for activities which coincide with the AONB's priorities. An imminent example is that Visit Herefordshire are preparing a bid for RDPE funding which may include activities such as promoting local food and drink, training, sense of place training and support for tourism group projects. The AONB could play a supportive role, help tourism local tourism groups develop ideas and perhaps deliver some sense of place training.

Another potential project which could involve AONB input is the aspiration of the Conservators to train volunteers to run more guided walks on the hills – through which management and sense of

place messages could be spread. The AONB could input to training content and help publicise the training. Tourism bodies, TICs and businesses could also promote the walks and take bookings.

5.4 Research

5.4.1 Discuss research priorities with partners

There appears to be a need for much more up to date data on tourism in the Malvern Hills. Most organisations are still reliant on figures from around 2000. Without new research the new policy and project work would be being developed without up to date statistics. Research projects would be a good way of bringing partners together – to discuss priorities with a view to funding research jointly sharing the costs, sharing the data and discussing the implications of the findings together.

5.4.2 Visitor survey

A new visitor survey would be extremely useful to identify the type of visitors coming to the area and their views and behaviour. There would be benefits in repeating key questions from the previous survey but the survey might not need to be so large with such as large sample – in order to keep costs down. Other options to extend the sample without increasing costs too much would be to have a self-completion survey option either through picking up forms in accommodation businesses or an online survey.

Visit Herefordshire is planning a visitor survey in 2012 or 13, so there is scope to enhance or piggy back on that through ensuring good sample levels in the AONB, adding some extra questions about the AONB or funding a sub area analysis for the AONB. Worcestershire LEP is also considering commissioning new visitor research and possibly an economic impact study.

5.4.3 Update accommodation stock data

Research on accommodation stock would be an important step towards calculating economic impacts of tourism in the area. There is anecdotal evidence of a loss in small hotels and guest houses but an increase in B&Bs. A limited piece of work, possibly by a competent student, could compile information for the AONB, Malvern and Ledbury. The recent South Worcestershire hotel study and the imminent report on hotel capacity and demand from the Marches LEP should help with this. The process could also include compiling a list of email addresses into a potential mailing list.

5.4.4 Economic impact research

If updated visitor spend data is generated from the visitor survey and reliable bedstock data is compiled it would be a relatively straightforward task to run an economic impact analysis to update the 2000 report. Knowledge of tourism's economic contribution in terms of income and jobs is an important element of sustainable tourism.

5.4.5 Monitoring visitor numbers

Estimating the numbers of visitors accessing the hills themselves is extremely difficult. There might be scope for an innovative research project to tackle this question. One option would be to trial a photographic technique – the Malvern Hills might be one of few countryside locations which could

be covered from a handful of locations. Photos taken every half an hour or hour over a range of days and months might enable estimates of total numbers to be made. Examining and trialling this and other techniques might constitute a good masters/PhD student project, in collaboration with the Conservators. There might be potential to liaise with Cheltenham or Worcester Universities.

5.4.6 Environmental impact research

Linked to the above research it might also be possible to integrate research into the environmental impacts of the visitors at various locations on the hills. This might enable the concept of Limits of Acceptable Change, detailed in the original Sustainable Tourism Strategy, to be revisited.

5.4.7 Business survey

A less ambitious but potentially very useful research project would be to survey as many tourism businesses in and around the area as possible. The aim would be to find out their business drivers and whether there was a significant need for more revenue from tourism to the area. Businesses could be asked which aspects of sustainable tourism they are most interested in. This would be useful before embarking on some of the more detailed projects below. It would be best to focus efforts on the type of sustainable actions for which businesses have some appetite. Such a survey could be undertaken online at relatively little cost or could be used to focus discussion at local tourism group meetings.

5.5 Delivering projects/actions

Many ideas have been generated in the course of this work. It is suggested that the AONB should choose to focus on one or two specific areas due to lack of resources e.g. walking, sense of place and delivering info through new technology. However it may be possible to support partner activities in other areas. Of course SDF projects will continue and could be judged in relation to revised policy priorities. Specific ideas are sketched out below under indicative headings:

5.5.1 Walking and cycling

- Review and update existing walking and cycling publications – discontinue some of the most outdated and produce better quality ones with pdfs, Viewranger and apps
- Develop and promote walking and cycle routes which link to local pubs and shops.
- Is there scope for new loops off major trails such as the Herefordshire Way?
- Promote walking and cycling routes from the stations – car free routes of varying lengths
- Reinvigorate Walkers are Welcome in Malvern. Forge stronger links to the walking festival and expand that. Encourage Ledbury to join Walkers are Welcome and to work with Great Malvern.
- Work with accommodation businesses – encouraging more businesses to apply for the walkers and cyclists welcome accreditation and GTBS.
- Walking breaks – encourage and equip businesses to promote walking breaks
- Work with bike shops in the towns.
- Help establish more businesses with electric bikes – including accommodation which could hire them out to guests.

- Develop and promote more day and half day propositions for people – including walks and drop offs, long walks from trains or buses.

5.5.2 New technology

- Develop more applications for QR codes and trails
- Develop a smart phone app for the Malvern Hills – with attractions, events, walks, eating places, pubs, history, management messages, interpretation of views etc. This is another project which several organisations could buy into and thereby strengthen links between them. Such a project might meet RDPE funding criteria. There might be potential to include a visitor payback element in the cost of the app.
- Having a Wi Fi base station on the hills has been discussed to enable pop ups on peoples’ phones to communicate messages, invite them into the town with offers, enable them to pay for parking remotely etc.
- Tourist information kiosk type facilities might have potential in key locations but smart phone technology may have overtaken this concept.

5.5.3 Sense of place

- Encourage producers to brand more products as Malvern Hills – e.g. lamb from those grazing the hills.
- Increase the profile of the Malvern Hills at local food festivals such as the Flavours of Herefordshire event (which is looking to increase links with the landscape through an HLF bid over the next few years)
- Consider the potential for events celebrating sense of place, possibly even a Festival of the Malvern Hills.
- Highlight the differing special features of the area with businesses –maybe through written materials or lectures. A better option might be to run sense of place workshops –helping businesses on how to use sense of place in their marketing. This could be linked to skills development in marketing and online promotion.
- Familiarisations trips and or walks to promote the AONB and its special features, and to local attractions, or to tie in with the launch of a new walks promotion or bike hire etc.
- Establishing an ‘Ambassadors’ scheme for businesses. It may be too early for this. It was felt that there is a need to raise the level of pride and awareness initially but this might be a longer term aspiration.

5.5.4 Joining up and spreading out

- Further projects such as the new visitor map which help join up the things the area has to offer for visitors to make it easier for visitors to choose and participate. This might include more activities and events outside the core hills area
- Engage with the theatres and see if they might show videos of the Hills and wider area. There would be scope for various messages to be promoted. If such videos existed they could also be shown in local hotels etc. They might include vignettes of key stories, maybe short interviews with key people like a warden, a farmer, a B&B owner etc. This might

constitute a video project for a local school or college and could be used on the AONB website.

- Visit Herefordshire and Destination Worcestershire are liaising about developing more packages – this might include scope for businesses in the Malvern Hills area to put together joint packages.
- Ways of supporting the role of the TICs in Ledbury and Great Malvern, which are still a bit precarious. Any income generating activities e.g. bookings for guided walks etc. would be welcomed.
- Working with the showground, theatres and major attractions such as Eastnor and Croome – ideally to get information to visitors before they arrive so that they can be encouraged to stay longer. This might include pre visit offers, featuring the QR code for the AONB website on their leaflets or links to the planned app.
- The area receives many overnight visits from business people visiting nearby companies. This is an opportunity to try to encourage repeat visits for leisure purposes.
- Encourage relatives visiting pupils at local schools to stay overnight and go for walks, visit local attractions, take local produce home.
- Our Land Initiative – Join in if it is rolled out nationally. The scheme could be used as an incentive for businesses to reconsider GTBS and AONB sense of place issues, local food etc.

5.5.5 Support specific development proposals

- A dedicated mountain biking centre might draw people away from the hills (e.g. at Eastnor Castle or Townsend Way). Although there is a risk it might simply raise the profile of the area for mountain biking and not divert much activity.
- A new visitor centre to interpret the Hills. The AONB should liaise about any new proposals to ensure the AONB is showcased sufficiently.
- New transport services. For example there may be potential for regular taxi/minibus pick-ups and drop-offs for walkers in a more regulated format.
- Sustainable transport ideas e.g. pedicabs round Great Malvern (as are becoming popular in Hereford)
- Re-open Malvern Wells railway platform (a major capital project), which would be a convenient location to access the hills from.
- Riding – promoting it as an activity in more locations.

5.5.6 Visitor payback

- Visitor payback in the Malvern Hills works currently through car park fees to the Conservators. It is thought unlikely that a separate new scheme would be possible, particularly due to the dominance of day visitors. However it would be worth monitoring progress in other AONBs and considering feasibility work at some future stage.
- Other options include business sponsorship e.g. using a Malvern Hills name for a beer and giving a % toward conservation projects

5.6 Developing future prospects

Action on clarifying tourism policy, new data and better communications and joint working with partners will all be useful when considering longer term options for AONB action on tourism. There are some possible opportunities for funding for which a more ambitious proposal could be developed. It would not be possible for the AONB to lead on new activity such as this unless the costs of project staff can be included within the funding application. Partner organisations have staff specialising in funding bids and who can advise on potential funding routes.

Options include:

- RDPE Rural Economy Grant. This needs 60% private match funding but it would fund mobile apps, Viewranger GPS walks and several of the ideas above would be eligible. It does not fund marketing or core organisational costs. The RDPE co-ordinator was encouraging towards a project in the Malvern area.
- LEADER –Working towards a project in the next programme likely to be in 2015 or beyond when tourism projects are likely to be a priority again. Working across two Local Action Group areas may be problematic.
- HLF – Having had a recent Landscape Partnership may mean another project too soon wouldn't be successful – but appropriate ideas could be developed in due course.
- Great Malvern and Ledbury are both applying for a Portas Pilot grant. Local traders are said to be quite motivated working on it. If successful there may be scope to support measures and even if not partners may still be able to help make some of the ideas happen.
- Community Infrastructure Levy on new houses to local authorities. This funding is most likely to go on highways improvements but there might be scope to invest in parking etc.

5.6.1 Support and participate in new projects

Work with partners on their RDPE/REG projects over the next two-three years.

5.6.2 Develop a more ambitious AONB project

Work up an AONB project in the longer term – for LEADER, REG or HLF but the project must include a project officer to implement the action. An application drawing on recent research findings is likely to be more successful, so it could follow the proposed research - what the businesses prioritise and what visitors would like to see.

6. Summary of opportunities

This table summarises the options described in section 5 and attempts to identify the resource implications in terms of staff time/input required and also likely costs. A priority has been allocated to each option based on an initial assessment of the effort and resource required balanced against the likely benefits and impacts. This priority ranking can be reviewed or refined with an associated timescale following more discussion by the AONB Partnership.

| | Opportunity | Staff resource implications | Cost implications Low nil- £2,000 Medium £2-10,000 High over £10,000 | Priority |
|--------------------------|---|---|---|-----------------|
| 1. Policy | | | | |
| 1.1 | Clarify the AONB's policy/stance on tourism. | Medium (short term)– will need discussions, drafting, liaison and agreement | Low | High |
| 1.2 | Sustainable tourism partnership agreement/ memorandum | Medium | Low | Medium |
| 1.3 | Develop a Sustainable Tourism Strategy | High – liaise with partners, secure funding, write brief, commission and manage process, implement. | High – £20-25,000 for strategy | Low |
| 1.4 | Develop a visitor management or recreation strategy | High – similar process to above | High | Low |
| 1.5 | Influence partners' tourism and marketing strategies | Low- Medium (short term) – attend meetings, discuss, draft input | Low | High |
| 2. Communications | | | | |
| 2.1 | Raise awareness of the AONB | Low but ongoing – integrated across work programmes | Low | High |
| 2.2 | Update AONB Communications Plan | Low (one off) – relatively brief exercise | Low – in house within Partnership | High |
| 2.3 | Review and extend AONB website | Medium – agree objectives and compile additional content | Medium – probably need to use web designers, new software. Perhaps £5,000 – more if more ambitious plans. | Medium-High |
| 2.4 | Increase outreach | Medium – time to attend events and meetings | Low | High |

| | | | | |
|-------------------------------|---|--|--|--------|
| 2.5 | Increase PR activity | Low but ongoing – time to write press releases and boost PR activity | Low, unless outside support recruited | Medium |
| 2.6 | Establish an AONB ‘presence’ at key location(s) | Low-Medium – discussions and agreement required | Low-Medium – depending on design of ‘presence’/map etc – perhaps £3,000 | Medium |
| 2.7 | AONB map poster | Low (one off) – commission and distribute | Low – about £1-2,000 for printing costs | Medium |
| 2.8 | Use social media | Medium – short but regular activity on an ongoing basis | Low | Medium |
| 2.9 | AONB E-newsletter | Low – adapt from existing – several times a year. | Low | Medium |
| 2.10 | Promotional media | High – agree brief, commission, manage, distribute | Medium – depending on format | Low |
| 2.11 | AONB boundary signs | Medium – liaison with community, highways, design – for each sign | Medium-High – individual signs can cost several £000, special designs would be more. | Low |
| 2.12 | Sustainable tourism awards | Medium – annual commitment, depends on number of categories, PR required | Low – award event and actual award costs | Low |
| 3. Partnership working | | | | |
| 3.1 | Strengthen partnership working | Medium – time to meet, discuss etc ongoing | Low | High |
| 3.2 | Establish a tourism forum or liaison group | Medium – perhaps 3 meetings a year to set up and service - ongoing | Low | Medium |
| 3.3 | Join tourism organisations and participate | Low-Medium – admin and communications | Low £500-£1,000 to join and promote via 2-3 bodies | Medium |
| 3.4 | Support partner funding bids/projects | Variable – depends on project and AONB role | Low unless match funding required. | High |
| 4. Research | | | | |
| 4.1 | Discuss research priorities with partners | Medium – meetings – could be ongoing if research is commissioned | Low | High |
| 4.2 | Visitor survey | Low-Medium – liaison over commissioning and dissemination of | Medium – perhaps £5,000 depending on sampling | High |

| | | | | |
|--|---|--|--|--------|
| | | results | | |
| 4.3 | Update accommodation stock data | Low – commission work on one off basis | Low £1,000 | Medium |
| 4.4 | Economic impact research | Low- Medium – liaison over commissioning and dissemination of results | Medium – perhaps £3,000 | Medium |
| 4.5 | Monitoring visitor numbers | Depends on how established | unknown | Medium |
| 4.6 | Environmental impact research | Depends – could be considerable | unknown | Low |
| 4.7 | Business survey | Low-Medium (one off unless repeated annually) depends whether in house or commissioned | Low – perhaps £500 using survey monkey or similar | High |
| 5. Delivering projects/ actions | | | | |
| 5.1 | Walking and cycling | Medium-High | Medium – varies depending on action | High |
| 5.2 | New technology | Medium-High | Medium-High | High |
| 5.3 | Sense of place | Medium | Low-Medium | High |
| 5.4 | Joining up and spreading out | Medium | Low (Our Land may require more resources) | Medium |
| 5.5 | Support specific development proposals | Low - reactive | Low (possible SDF funds) | Medium |
| 5.6 | Visitor payback | Low (unless major scheme launched) | Low (unless major scheme launched) | Low |
| 6. Developing future prospects | | | | |
| 6.1 | Support and participate in new projects | Medium | Low (unless match funding required) | High |
| 6.2 | Develop a more ambitious AONB project | High – considerable input required for funding bids | Unknown – costs may be recouped through funding but match likely to be required. | Medium |