Derby, Derbyshire & Peak District Tourism Baseline

PART OF D2N2 TOURISM IMPACT STUDY

OCT 2013

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D2N2 LEP

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APPENDIX

1 INTRODUCTION

1.1 PURPOSE & SCOPE OF THIS REPORT

Colliers International, working with Amion Consulting, has been commissioned to review areas of potential opportunity for the visitor economy within the D2N2 area. Ultimately, the work will be used to support appropriate development activity in the area and must assist Visit Peak District and Experience Nottinghamshire (the two Destination Management Organisations) in the development of their Destination Management Plans.

The work is in two stages. The first stage provides a baseline assessment which identifies the assets and attributes which already exist in the region and calculates the value of the visitor economy today. Its aim is to provide a robust evidence base against which future development decisions can be made.

Based on the first stage of work, the second stage will identify the gaps in the current offer and make recommendations about how these could be filled. It will also provide a 'toolkit' or a model for assessing whether future developments are appropriate and will provide an acceptable return on investment.

Although the work looks at the Peak District/Derbyshire and Nottinghamshire as a whole, it recognises that the two areas have very different priorities and needs which are reflected in the emerging strategies for the two Destination Management Organisations (DMOs). The outputs will therefore, consider each area separately as well as providing an overarching summary which embraces both and considers any opportunities which straddle them and link them together for mutual benefit.

This report covers the first stage of the work for the Peak District and Derbyshire area.

It includes:

- A review of the tourism policy context;
- A market audit;
- An existing product audit;
- An identification of the key issues and development opportunities identified through the extensive consultations undertaken as part of the study (including any developments or plans which are already underway);
- A tourism impact assessment;
- A summary of the next steps.

1.2 METHODOLOGY USED

This report has drawn on a number of data sources.

The Policy & Context section has been drawn from publicly available documents and reports, supplemented where required by consultations with relevant stakeholders.

The Market Audit section has been taken primarily from data from the latest 2011 census and tourism data from Visit England. The International Passenger Survey has also been used to make an assessment of overseas visitors.

The Product Audit has been compiled using a range of on line and off line sources, supplemented by stakeholder interviews. It includes both quantitative and qualitative information and sources have been shown where relevant. It should be noted that where qualitative commentary has been provided, recognised sources have been used in order to give an indication about the way in which the destination is perceived. As with any qualitative assessment, it cannot be seen as comprehensive or definitive, but rather as part of the overall picture.

The methodology used in undertaking the consultations is explained in Section 5.1.

The methodology adopted to assess the value of tourism in Section 6 has been informed by guidance produced by VisitEngland[1] and the Tourism Intelligence Unit at the Office for National Statistics (ONS).[2]

1.3 DERBY, DERBYSHIRE & PEAK DISTRICT AREA

The area covered in this study is referred to as Derby, Derbyshire and the Peak District. It is a large and varied area which 'straddles the border between the northern highland parts of Britain and the southern lowland counties[3]'

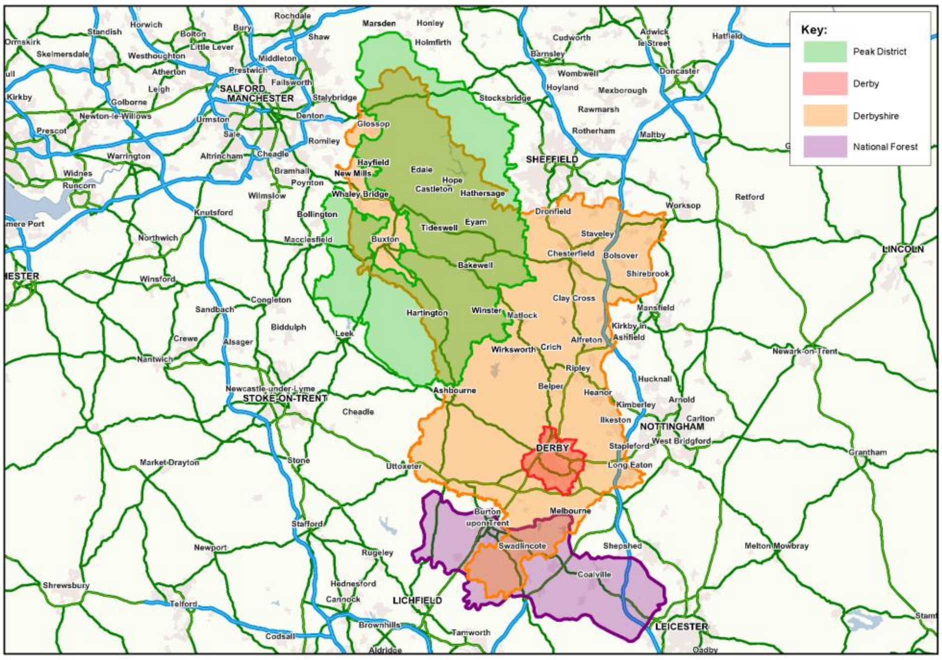
The following map shows the extent of the area covered. Further detail is provided in section 3.

[1] VisitEngland ( ), *What is Tourism Worth: Understanding the Value of Tourism at Regional and Sub-Regional Level.*

[2] ONS (2011), *The Sub-Regional Value of Tourism in the UK in 2008.*

[3] Visit Peak district website

Figure 1: Map of Derby, Derbyshire & the Peak District



Source: Colliers International

At the southern end is the National Forest whilst the northern tip, which sits within the Dark Peak, stretches just beyond Holmfirth. The majority of the area sits within the county of Derbyshire which is made up of eight local authority areas.

At the heart is the Peak District National Park, the UK's first National Park, which takes in parts of the counties of Derbyshire, Cheshire and Staffordshire.

The area includes a number of towns and villages of different sizes as well as the city of Derby.

1.4 PREVIOUS STUDIES

In 2007, consultants Scott Wilson were commissioned to provide an appraisal of the tourism investment opportunities in the Peak District and Derbyshire destination management zone.

The study considered both new and planned investment in the region and made recommendations on how the emerging opportunities within the sector could be maximised.

The study carried out a high level analysis of visitor volume and value and reviewed the nature of the tourism product in the area. The study highlighted the following key findings from the product audit;

- The key assets within the region were deemed to be Chatsworth House, the range of market towns, the Derwent Valley Mills World Heritage Site, Derby City, the Peak District National Park and the National Forest;
- The study highlighted an abundance of significant visitor attractions;
- There were a number of large conferencing venues at the time with business tourism seen as being important to the visitor economy. There was however, a lack of large scale venues which could also accommodate residential stays;
- Visitor accommodation was mainly located within the National Park with a high number of self-catering units. Hotel accommodation, especially larger scale properties, were lacking;
- The review recognised the opportunity for visitors to pursue informal outdoors activities like walking and cycling;
- The study highlighted the park area as a day visit destination due to proximity to large conurbations and not helped by the low levels of serviced accommodation stock;
- The report recognised the potential of the World Heritage Site which was not being fully exploited at that time;
- The National Forest was seen as lacking a recognisable tourism identity;
- Derby was singled out as a business tourism destination primarily, but with little to encourage longer stays by leisure visitors.

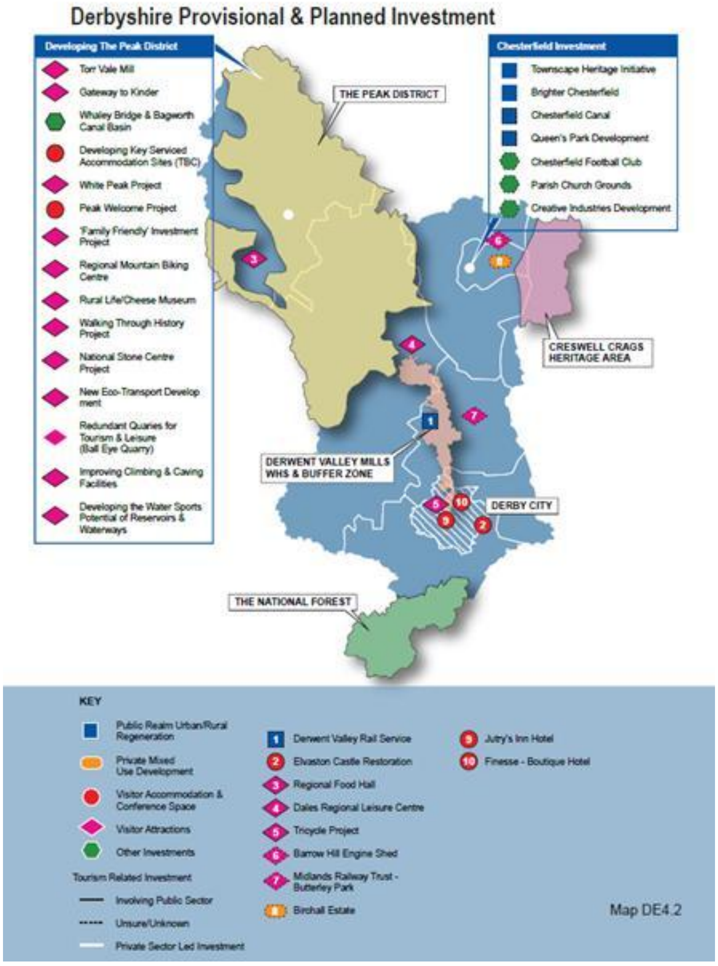
The study went on to note the key investment/ development opportunities which had been identified throughout the process of the study and which would fit with the DMP’s strategic aims.

They were;

- More of a focus on service quality and attention to detail;
- A need to focus on investments which would convert day visitors to staying visitors and develop attractions for visitors in the shoulder months;
- An opportunity to develop niche opportunities like food, outdoor leisure etc.
- An opportunity to develop a more family focused offer.

The report recommended that the DMP should maximise opportunities in what it saw as the key destinations; primarily in the National Forest, Derwent Valley Mills World Heritage Site and Derby City.

Figure 2: Investments planned at the time of the Scott Wilson Report



Source: Scott Wilson 2007

The overall findings of the study revealed that the majority of investments were concentrated in the Peak District National Park and were being driven by the National Park Authority or being funded through public sector regeneration schemes.

One aspect the report identified as not being fully addressed by plans at that time was the opportunity for *'fun-adventure'* developments which would fill the gap in the product offer for the family market and particularly those with children aged 10 to 16. Formal outdoor activity especially, was seen to be geared toward older people and it was felt that there was perhaps a missed opportunity for adventure based weekends and short breaks.

The issue of the lack of serviced accommodation was addressed to some extent through the planned developments identified for Derby City. There were few plans however, for the Peak District and whilst the significance of the Buxton Crescent was acknowledged, this was not thought to be sufficient in isolation to fill the gap. The report went on to recommend that there was a need to identify a number of *gateway towns* which could provide the required bedstock which would encourage more visits and longer stays to the park.

Finally, the report recommended a few key projects which needed closer attention from strategic bodies namely; Derby city regeneration, the M1 business corridor, an exhibitions centre and The National Forest.

There was thought to be an advisory role for the DMP for the following key projects; Derwent Valley Mills, servicing overnight visits, the Birchall estate and the solar pyramid.

Some further potential projects were identified as requiring funding, including the Buxton Food Heritage Centre and Elvaston Castle.

A number of projects identified in the Scott Wilson report have now been completed which has led to the commissioning of the current piece of work as a means of identifying new investment projects relevant to the current context and funding climate.

2 TOURISM & POLICY CONTEXT

2.1 OVERVIEW

A review of policy at a local, regional and national level serves to highlight the areas of priority for the government and other strategic bodies within the tourism sector and thus those areas which are most likely to receive both political and monetary support where the funding exists.

2.2 D2N2 POLICY CONTEXT

2.2.1 D2N2 STRATEGY DOCUMENTS

The D2N2 LEP was set up in 2011 to support and encourage economic growth in the region. Their *purpose/vision/ambition* and overall *strategy document* set out a number of strategic priorities which have been selected on the basis that they are deemed important for job creation and have particular significance to the region; the visitor economy is one of these strategic priorities.

In this document the visitor economy is defined as those activities directly associated with tourism, principally hotels and restaurants but also covering a wider range of assets such as visitor attractions, heritage, sports and leisure and the wider retail and cultural offer.

Further work on the *strategic priorities and areas of economic focus* done in 2011 by the D2N2 Board and Nottingham University Business School outlined the key strengths of the visitor economy in the region.

These can be summarised as;

- The Peak District National Park.
- The range of contemporary, historical, urban and rural attractions including some iconic attractions like Chatsworth House and Nottingham Castle.

The document also gives a brief overview of tourism in the region which suggests;

- Tourism has been affected by the recession, however, domestic tourism has been somewhat less affected due to the 'staycation' effect with domestic visitors supporting the short break market in particular;
- The D2N2 area accounts for 42% of visits to the East Midlands, just over half of which are to Derbyshire;
- Over 90% of visitors to Derbyshire are domestic visitors;

- The Derbyshire area has a much higher proportion of holiday visitors than Nottinghamshire;
- The hotels and catering sector has a lower than national average productivity.

The overall conclusion is that new investment would need to be carefully targeted to ensure than interventions in what is primarily a low skilled sector can be made to lead to growth in higher value tourism business activities.

2.2.2 D2N2 GROWTH PLAN 2013-2016

The *D2N2 Growth Plan 2013-2016* is currently being produced. The consultation draft goes into some depth about the programmes and interventions identified in key areas and the actions needed to achieve positive outcomes.

The *visitor economy group* identified some specific opportunities to support growth in the visitor economy;

- Tourism Investment Assessment: a detailed research and analysis project to assess viability, economic impact and financial delivery options for a long list of new and proposed 'anchor attractions' across the D2N2 area to inform development and marketing priorities. (Essentially the current study has been commissioned to provide this);
- Anchor attractions: once the anchor attractions have been identified through the investment assessment, D2N2 should identify the role it can play to ensure that finance is secured for their development and modernisation;
- Major events programme: D2N2 should work with the two Destination Management Partnerships to promote a co-ordinated major events programme.

Between 2013 and 2016 the D2N2 will consider the result of this report and pursue activity to promote growth through capital investments and revenue support in the visitor economy.

2.3 DERBYSHIRE POLICY CONTEXT

2.3.1 DERBYSHIRE LOCAL ECONOMIC ASSESSMENT 2012 (LEA)

The overall aim of the Derbyshire LEA is to provide an assessment of the county's economic performance and the factors which contribute to its performance and therefore, provides a good basis from which to begin to analyse opportunities for growth in the area.

Chapter 2 of the LEA references tourism, estimating that 20,823 full time equivalent jobs are supported by the tourism sector in Derbyshire. The document highlights that in terms of visitor numbers and visitor spend, the county is important to the tourism market within the East Midlands.

The document also refers to a number of other issues which have some bearing on the success of the visitor economy, if only, indirectly. For example transport and access issues are reviewed as well as employment structures and skills.

2.3.2 THE NATIONAL FOREST STRATEGY 2004-14

The National Forest encompasses a significant proportion of South Derbyshire and therefore the National Forest Strategy is worth further consideration. The strategy covers 10 year up until 2014 and documents the vision for the future development of the forest.

The National Forest was conceived by the countryside commission in 1987 when it was proposed that a new forest should be created to bring the benefits of forestry to the places where people live offering a new resource for outdoor activities, tourism and recreation and woodland industry.

The key principles of the strategy are to;

- create a coherent and identifiable new entity known as The National Forest;
- transform the area through a purposeful conversion of land use on a significant scale and at an exceptional rate;
- be a recognisable forest – by expanding wooded cover to about one-third of the area;
- enrich a diversity of landscapes and wildlife habitats;
- be enjoyable, welcoming and accessible for all;
- involve local communities in the Forest's creation;
- stimulate and add value to social and economic development;
- be a working forest - contributing to national timber supplies;
- be sustainable - environmentally, economically and socially;
- be geographically diverse and sensitive to landscape, natural and cultural history, and;
- help to integrate urban and rural environments.

The strategy refers specifically to tourism in which it is stated that the forest should be an exemplar of sustainable tourism. Account must be taken of the development of the brand, quality assurance, accessibility and developing the tourism product which includes the development of a number of woodland based visitor attractions, trails, accommodation, events and festivals and food and drink themes.

A number of projects are identified within the strategy which have further future potential pending development and funding.

2.4 DERBY POLICY CONTEXT

2.4.1 DERBY'S ECONOMIC STRATEGY 2011-2016

This economic strategy has been formulated to guide growth through job creation in Derby. The visitor economy is mentioned throughout.

One of the key opportunities identified for Derby is the World Heritage Site and in particular, the Silk Mill and Darley Abbey Mills. Indeed, realising the potential of Derby's heritage and tourism assets is a key aim of the strategy.

The strategy seeks to maximise the quality of life in Derby by;

- Reinforcing cultural and leisure facilities and the city's infrastructure;
- Pursuing low carbon economy opportunities;
- Developing a vibrant city centre, and;
- Realising the potential of Derby's heritage and tourism assets.

The strategy asserts that success in these key areas relating to the visitor economy will help generate future employment and productivity growth.

2.4.2 DESTINATION DERBY: VISITOR ECONOMY STRATGEY 2011-2016

This strategy, produced by the City Council, provides a context for the visitor economy, a baseline analysis of visitors, a strategic context and a range of objectives.

It presents the key tourism assets of the city which include the shopping offer (enhanced by the 2 Business Improvement Districts or BIDS), the World Heritage Site, the vast array of open green spaces in the city and the vibrant festivals and events programme. Other assets such as the range of theatres, cinemas and museums are also highlighted.

The strategy identifies that the profile of visitors coming to Derby is desirable with a large proportion of higher spending types of visitors.

The document sets out three key objectives which are;

1. Enhancing Derby's identity for visitors by communicating authentic, unique stories and themes.
2. Promoting new developments to improve Derby as a destination.
3. Improving the quality of the visitor experience.

Each of these objectives comes with a number of specific actions which could be taken to achieve the planned outcomes.

The planned outcomes of the strategy are;

- A 10% increase in the number of day visitors;
- A 5% increase in the number of staying visitors;
- A 10% increase in visitor spend;
- A wider awareness and reputation of Derby as a short break destination, and;
- A wider range of quality things to do and associated visitor economy related products available.

2.5 PEAK DISTRICT POLICY CONTEXT

2.5.1 PEAK DISTRICT NATIONAL PARK MANAGEMENT PLAN 2012-2017

The 2012-2017 review was heavily informed by the preceding plan which covered the period from 2006-2011. The overarching vision is *'where beauty, vitality and discovery meet at the heart of the nation'.*

The plan is split into 4 key themes;

- *A diverse working and cherished landscape (DL)* – the visitor economy related issues within this section involve sustaining and enhancing cultural heritage and local traditions;
- *Thriving and vibrant communities (TV)* – the main concern for the visitor economy is the need to have thriving villages, hamlets and the market town of Bakewell which will adapt to new challenges whilst retaining their valued historic and cultural integrity;
- *Welcoming and inspiring place (WI)* – the National Park will become a welcoming and premier destination where visitors are inspired to act in a way which sustains the environment and the special qualities of the Peak District. Accessible and diverse recreation is also a key goal within this theme;
- *An enterprising and sustainable economy (ES)* – identified within this theme is the need to support all industries but that development in relation to any sector should not impinge on the special landscape.

2.5.2 PEAK DISTRICT NATIONAL PARK CORE STRATEGY 2011

The core strategy reinforces the importance of the national park nationally, regionally and locally. It is a spatial planning expression of the previous *National Park Management Plan 2006-2011 and the 2012-17 management plan*. The document also takes into account findings from the *sustainable community* *strategies* of each local authority and so combines the priorities set out in each of these previous documents.

The policies in this core strategy provide:

- definition and clarity of the approach to conservation and enhancement for the valued characteristics (i.e. the special qualities worth preserving) reflected in national park designation; and
- an appropriate way in which opportunities to support sustainable local communities and businesses can be fostered alongside the pursuit of statutory purposes.

Key strategic issues are considered regarding recreation and tourism and these explore the ways in which visitors can enjoy the national park in a responsible and sustainable way.

Across all parts of the National Park policies will;

- Manage off-road recreation so that legitimate users can enjoy the area without damaging the landscape or other peoples' enjoyment of it;
- Enable development of appropriate sites and facilities in settlements shown on their key diagram;
- Support low-key development or improvement of facilities in recognised visitor locations where they enhance recreation opportunities and understanding of the National Park;
- Encourage and support sustainable travel options that jointly address visitors' and residents' needs;
- Support work that maintains and fills gaps in the rights of way network.

There are a number of further outcomes which are recommended for specific parts of the Peak District.

The overarching message is about conservation and protection. Major developments are more appropriately sited just outside the national park, this is especially the case with medium to large hotel developments. Whilst recognising this, the authority want to promote awareness of the Peak District and encourage activities like active tourism and specific types of events aimed at visitors. Accommodation provision will also be allowed to encourage more staying visitors where there is a conversion of a traditional building rather than a new build with minimal impact to the landscape.

2.6 ENGLAND POLICY CONTEXT

2.6.1 VISIT ENGLAND: A STRATEGIC FRAMEWORK FOR TOURISM 2010-2020

The vision of the framework is *to maximise tourism's contribution to the economy, employment and quality of life in England* and outlines three main objectives;

1 To increase England's share of global visitor markets;

2 To offer visitors compelling destinations of distinction;

3 To champion a successful, thriving tourism industry, and;

4 To facilitate greater engagement between the visitor and the experience.

These objectives have some bearing on the D2N2 area and similar aims have been highlighted for tourism in the local policy documents. However, where this overarching framework really becomes relevant to the D2N2 area is through its accompanying action plans.

In particular, the rural tourism action plan has many synergies with the goals for tourism within much of the D2N2 area and most notably for the Peak District National Park.

The objectives set out within the action plan are;

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, and;

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 impetus behind this emphasis on rural tourism is the belief that rural tourism offers significant growth potential for the wider England visitor economy.

2.6.2 GOVERNMENT TOURISM POLICY

The government tourism policy was published ahead of the London Olympics 2012 at a time when there was a particular focus on tourism. However, this has led to an increased commitment to tourism from the government in the longer term and this paper outlines in more detail, their approach.

The emphasis is on;

- Delivering stronger, more focused tourism bodies, making local tourism organisations more industry led and giving Visit England responsibility for guiding them;

- Raising industry standards by improving the star rating systems, harnessing consumer feedback and providing better tourist information;
- Making the industry more competitive by investing in skills, creating tourism product for bad weather and packaging holidays together for domestic tourists more effectively;.
- Improving the transport infrastructure which visitors use.

This policy provides an outline of how the government plans to give the tourism sector greater control over its future, enabling quicker adaptation to the demands and changes within the sector.

3 MARKET AUDIT

3.1 OVERVIEW

The market audit outlines an overview of the likely markets for tourism within Derbyshire. Within the audit an analysis of the following segments is provided;

- The resident market in Derby – those people who are likely to form the basis of local visits/day visits within the city and county as users of much of the available tourism product;
- The resident market in the Peak District and Derbyshire – similarly day visitors who are likely to use the tourism product which is available locally;
- The day visit market – this section looks in more detail at the volume of day visitors and their characteristics and activities they undertake;
- Staying visitors to Derby – this section looks at the volume, value and characteristics of both domestic and overseas tourists staying overnight in the city;
- Staying visitors to the Peak District and Derbyshire – an analysis of the volume, value and characteristics of both domestic and overseas tourists staying overnight in the Peak District National Park and Derbyshire.
- Special interest and niche visitor markets – an analysis of specific groups visiting the area such as coach tourists, for example.

The aim of the market audit is to pull together all of the available data on tourism within the region to produce a more comprehensive picture than has been achieved previously to inform the later stages of the work.

3.2 RESIDENTS

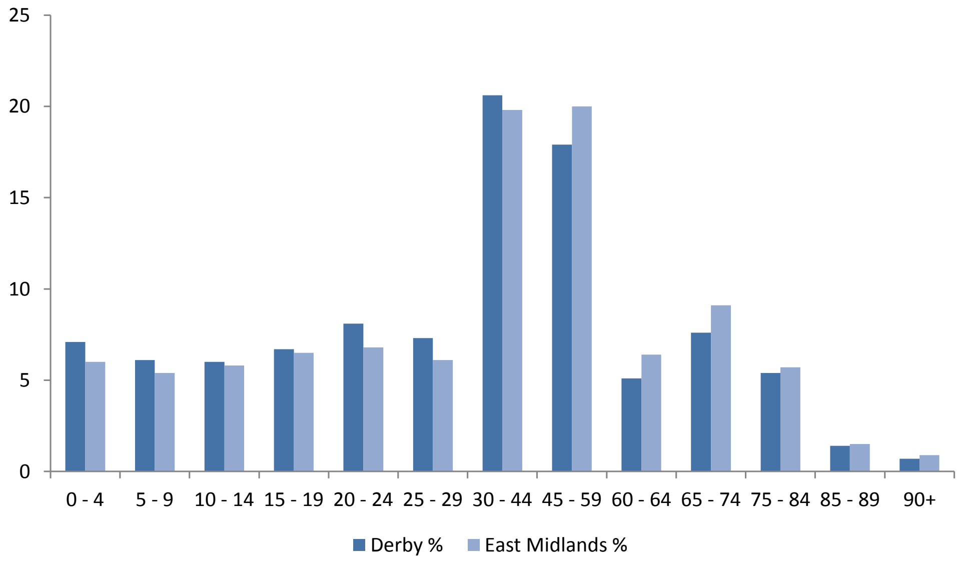
3.2.1 DERBY

Derby is a city and unitary authority in the East Midlands region of England.

Derby has a resident population of **248,752** people which is about 32% of the total population of Derbyshire and c. 5% of the total population of the East Midlands.

Derby has a youthful population compared to the wider East Midlands area with particularly high numbers of those ages between 30 and 59.

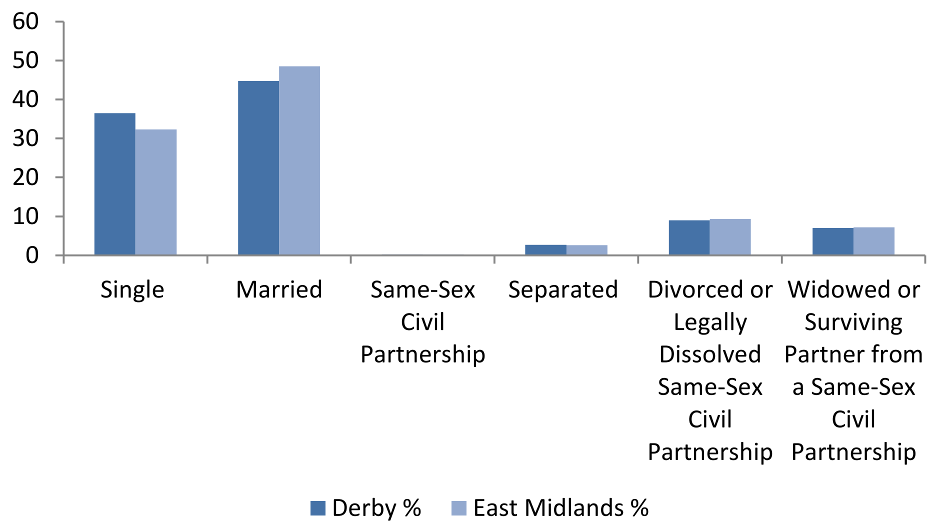
Figure 3: Age Profile of Derby Residents



Source: ONS 2011

There are rather fewer residents who are married living in Derby than in the East Midlands as a whole which probably reflects the younger age profile of the city.

Figure 4: Marital Status of Derby Residents



Source: ONS 2011

The official statistics on ethnicity show that although the resident population of Derby is predominantly white there are a higher proportion (c.5%-6% more) of Asians and British Asians than in the East Midlands and England as a whole.

Figure 5: Ethnicity in Derby

Ethnic Group (2011)	*Derby %*	*East Midlands %*	*England %*
White	80.2	89.3	85.5
Asian/Asian British	12.6	6.4	7.7
Black/African/Caribbean/Black British	3.0	1.7	3.4
Mixed/Multiple Ethnic Groups	2.9	1.9	2.2
Other	1.3	0.6	1.0

Source: ONS 2011

There are areas of deprivation in Derby as indicated by the higher number of residents falling into socioeconomic groups D/E; the group which represents unskilled workers, unemployed and those on state benefit.

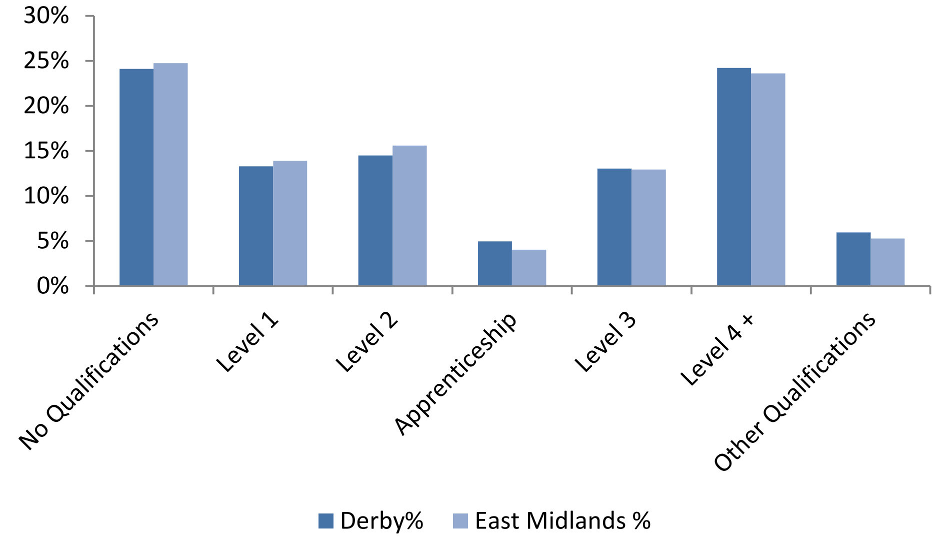
Figure 6: Socioeconomic Grade in Derby

Source: ONS 2011

The JSA claimant statistics support this finding with about 4.8% of Derby residents claiming benefits compared to 3.7% and 3.8% in the East Midlands and England.

The level of education residents achieve in Derby shows a divide between those who have no qualifications and those who are quite highly education achieving level 4 or above which is degree level or more.

Figure 7: Educational Attainment in Derby

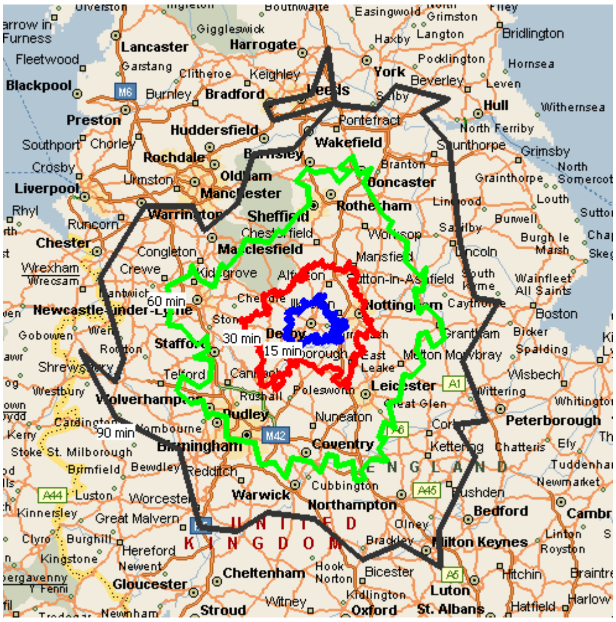


Source: ONS 2011

The divide in educational attainment levels is unsurprising given the high number of students living in Derby which is above the UK average (6.6% UK average) and sits at 7.3% of Derby's total population.

An analysis of the population within a number of key drive times of Derby shows that there is a total cumulative resident population of over 11 million people within 90 minutes' drive of Derby and 4.9 million households.

Figure 8: Map showing population within 15, 30, 60 and 90 minutes of Derby



Source: Mappoint Europe 2013

Derby has a sizeable resident catchment and even within the smaller drive times the population is large.

Figure 9: Population within key drive times of Derby

Drivetime (mins)	*Population*	*Cumulative Population*	*Households*	*Cumulative Households*
0-15	297,219	297,219	130,219	130,219
15-30	954,136	1,251,355	412,502	542,721
30-60	5,242,219	6,493,574	2,222,039	2,764,760
60-90	4,893,213	11,386,787	2,097,128	4,861,888

Source: Mappoint Europe 2013

In terms of income within key drive times the 0-30 minute drive time is the most affluent whilst at the same time containing high number of households earning under £10K per annum.

Figure 10: Income within key drive times

Drivetime (mins)	*Household Income under £10K*	*Household Income £10K-£19,999*	*Household Income £20K-£29,999*	*Household Income 30K +*
0-15	14%	28%	39%	20%
0-30	13%	26%	26%	35%
0-60	15%	29%	39%	17%
0-90	14%	28%	39%	18%

Source: Mappoint Europe 2013

3.2.2 PEAK DISTRICT AND DERBYSHIRE

Derbyshire is made up of 8 local authorities with a combined population of **769,686** residents.

The Amber Valley has the largest resident population followed by Erewash and Chesterfield.

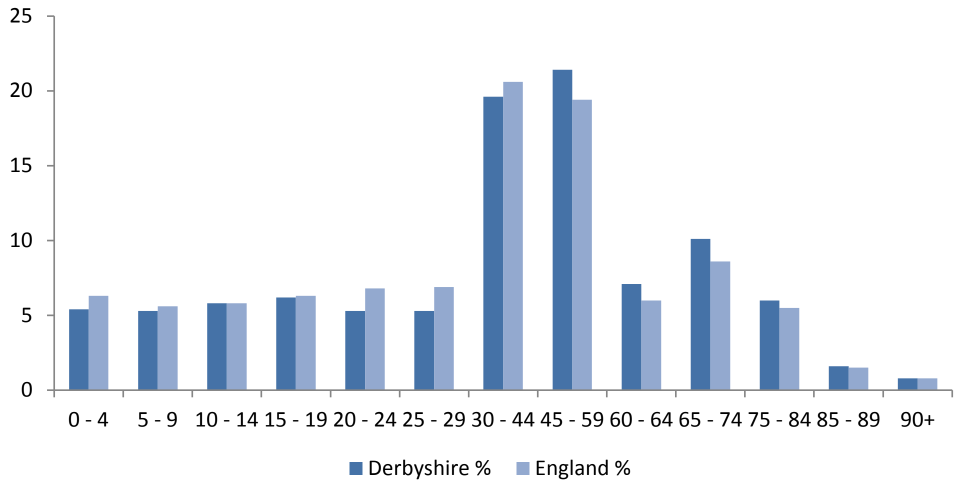
Figure 11: Derbyshire Population

Area of Derbyshire (2011)	*Population*
Amber Valley	122,309
Erewash	112,081
Chesterfield	103,788
North East Derbyshire	99,023
South Derbyshire	94,611
High Peak	90,892
Bolsover	75,866
Derbyshire Dales	71,116
Derbyshire	**769,686**

Source: ONS 2011

The age profile of Derbyshire shows a resident population that is slightly older than the England average with the main category of residents aged 45 to 59. There are also a fairly significant number of older people of retirement age living in Derbyshire compared to the national average.

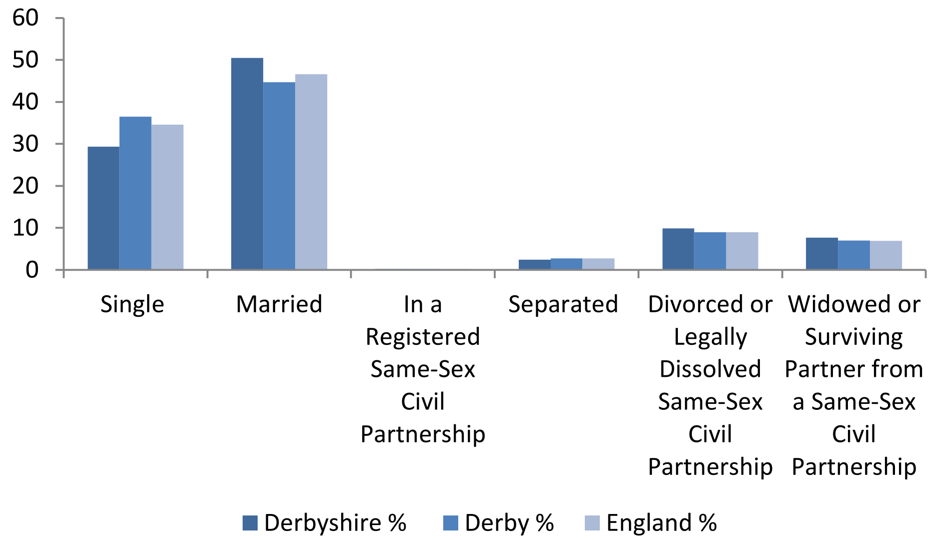
Figure 12: Age Profile of Derbyshire Residents



Source: ONS 2011

Residents in Derbyshire are more likely to be married than residents of Derby or indeed, England as a whole.

Figure 13: Martial Status of Derbyshire Residents

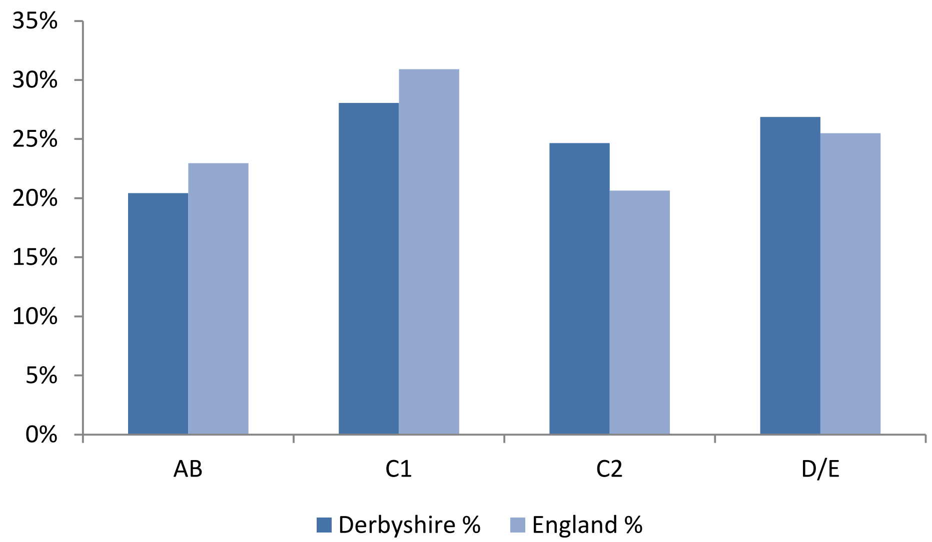


Source: ONS 2011

The statistics on ethnicity in Derbyshire show a polarised breakdown with over 97% of residents classing themselves as white. This is an exceptionally high proportion compared to the national average which is 85.5% white.

An analysis of socioeconomic grade in Derbyshire shows a high number of C1's but an almost equal number of D/E residents and a higher than average number of C2's, indicating that there is probably great disparity in levels of income between different areas within the county.

Figure 14: Socioeconomic Grade of Derbyshire Residents

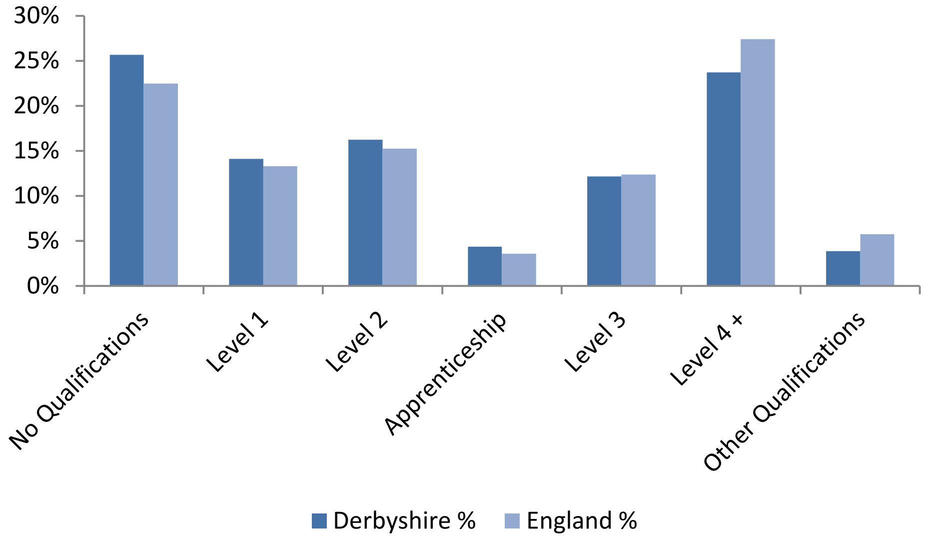


Source: ONS 2011

However, Derbyshire has lower than the national average number of JSA claimants at about 3.1% compared to a national average of 3.8%.

Educational achievement in the county shows a mixed picture. The most striking trend is that there are more people in Derbyshire with no qualifications than the national average.

Figure 15: Educational Attainment in Derbyshire



Source: ONS 2011

3.1 DAY VISITORS

The most recognised definition of a Day Visitor is a person who travels to and from their home to a destination for any 'unusual' purpose and for at least three hours. It excludes people who travel to a particular place for any regular activity such as going to their regular place of work, for routine shopping or to visit a relative if this happens on a regular rather than an occasional basis.

Clearly the pattern of day visits to different destinations varies significantly. Bigger destinations and those with particularly good reputations draw day visitors from relatively long distances. People will also generally travel further to visit places or venues which offer something they are particularly interested in. It is impossible therefore to draw a precise boundary around Derbyshire's potential day visitor catchment market.

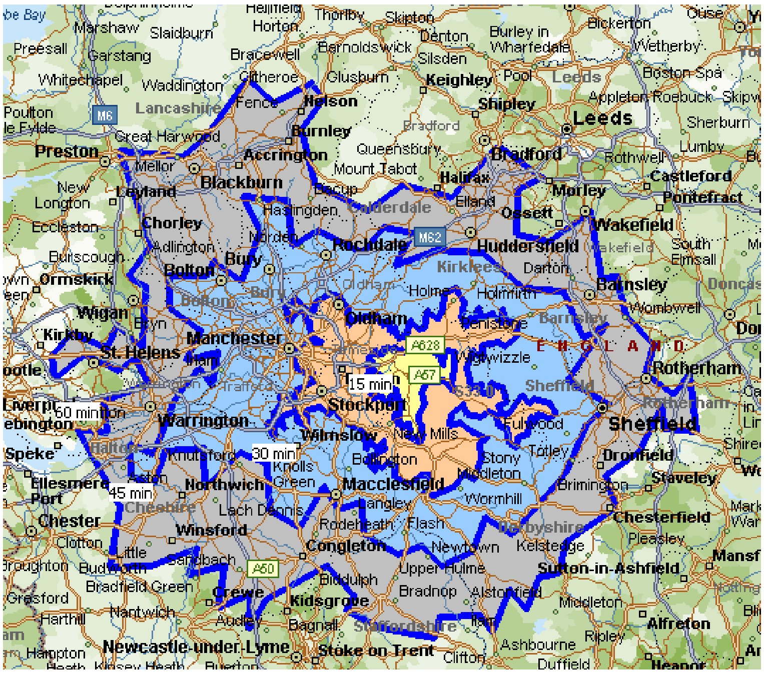
Unfortunately there is very limited data available about the profile of current day visitors to Derbyshire. The Great Britain Day Visits Survey offers information about the volume and value of day visits (see below) but provides less of a picture of where day visitors to Derbyshire come from or where they are going within the County.

Generally however, the majority of day visits to most destinations come from people living within a 60 minute drive time[4]. The following analysis therefore looks at the size and characteristics of people living within a 60 minute drive time of the

[4]Travel time rather than just drive time is important for some destinations, particularly those with good train links. In most cases however, when travel time to and from stations has been allowed for, the 60 minute catchment is similar whether people are traveling by train or car and therefore the available market is much the same.

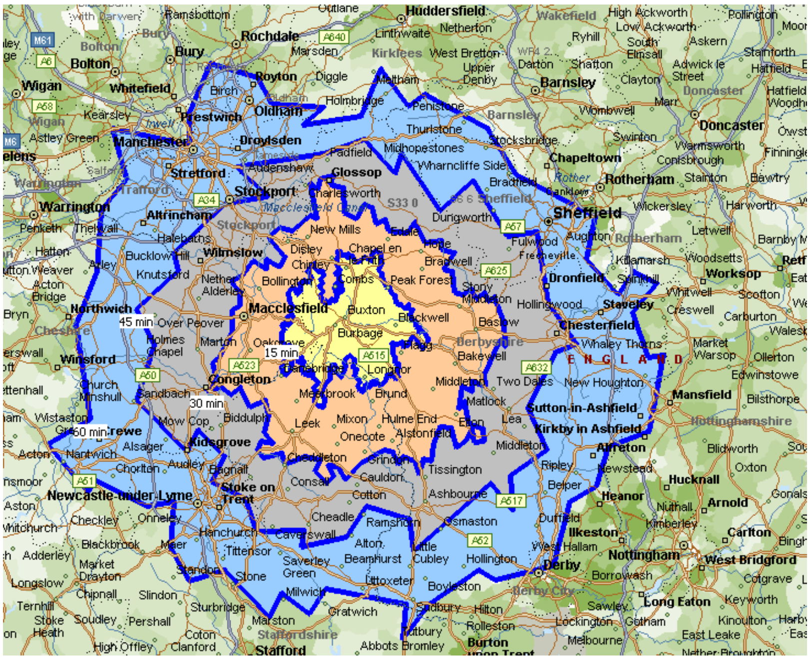
north, south, east and west of the county using major towns and cities towards the outer edges of the county as reference points from which an indicative catchment market can be identified. These places have been chosen because of their locations towards the corners of the County, not to suggest that these are the main places that day visitors are choosing to visit!

Figure 16: Drivetime catchment within a 60 minute drivetime of Glossop



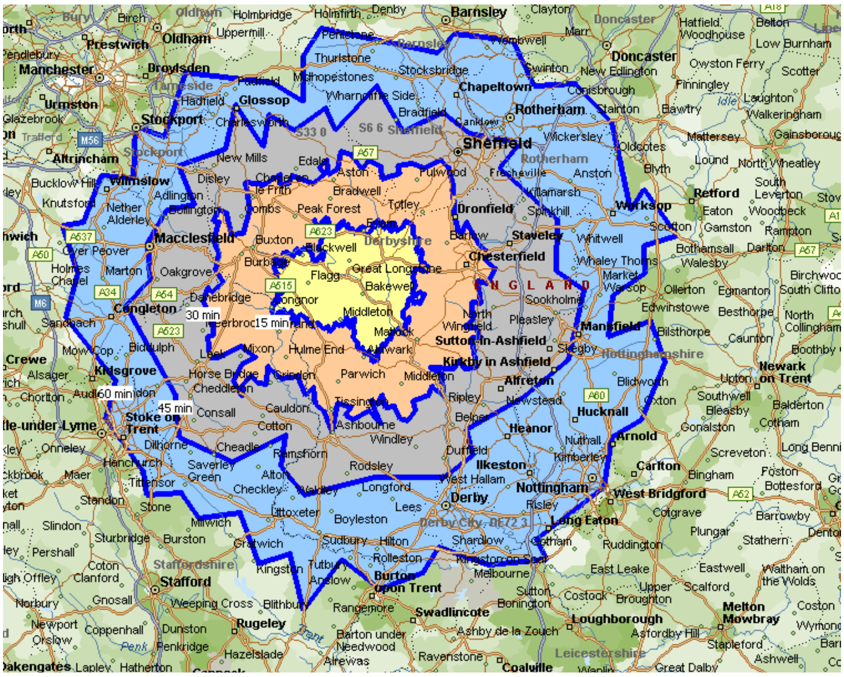
Source: MapPoint Europe 2013

Figure 17: Drivetime catchment within a 60 minute drivetime of Buxton



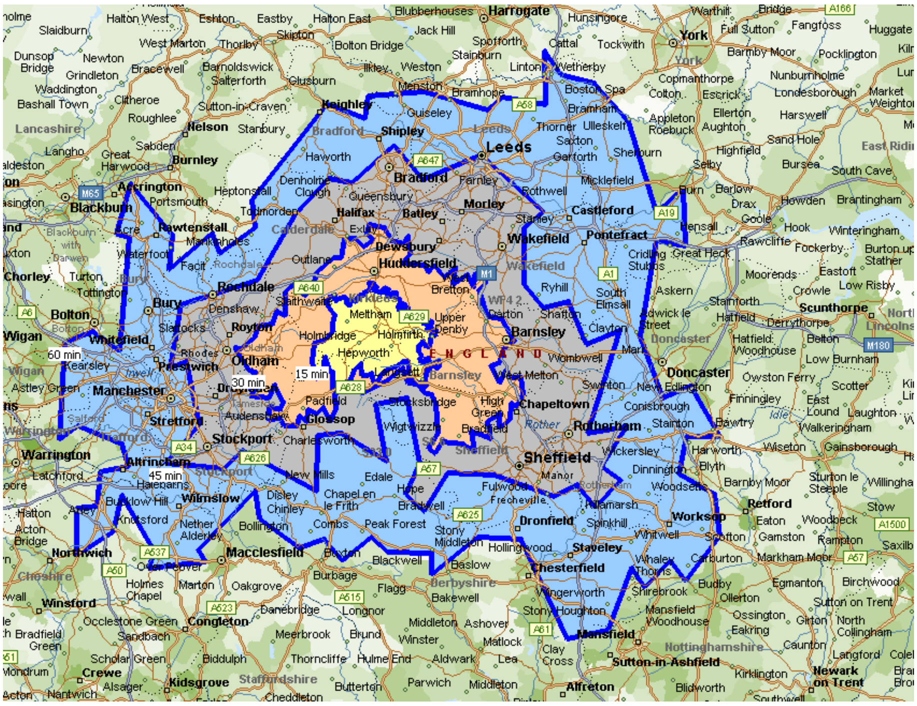
Source: MapPoint Europe 2013

Figure 18: Drivetime catchment within a 60 minute drivetime of Bakewell



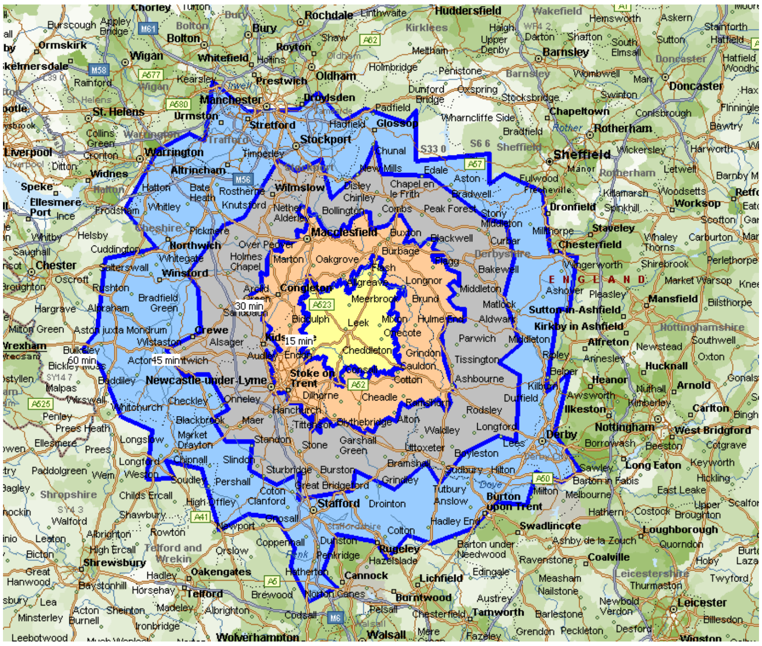
Source: MapPoint Europe 2013

Figure 19: Drivetime catchment within a 60 minute drivetime of Holmfirth



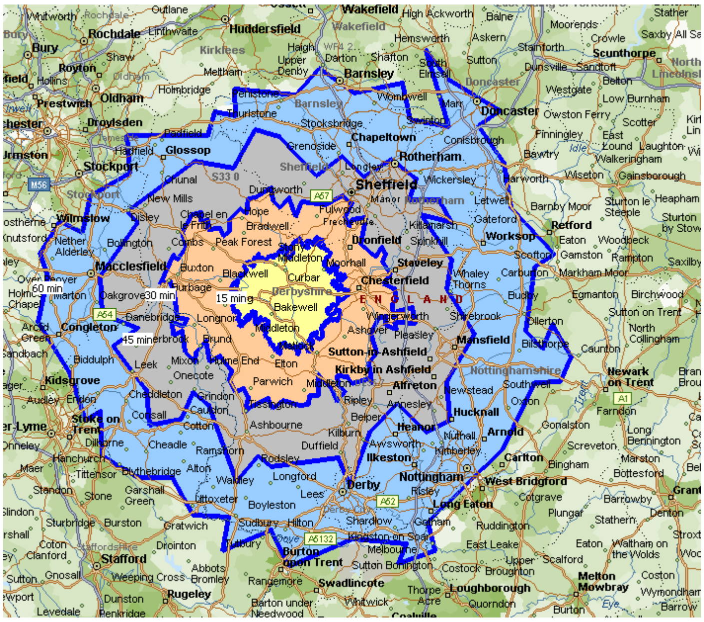
Source: MapPoint Europe 2013

Figure 20: Drivetime catchment within a 60 minute drivetime of Leek



Source: MapPoint Europe 2013

Figure 21: Drivetime catchment within a 60 minute drivetime of Chatsworth



Source: MapPoint Europe 2013

An analysis of the volumes of the population within key drive times of the main towns in Derbyshire gives a further idea of the total size of the potential day visit market.

Both the immediate and wider catchment around Holmfirth takes in the largest volume in terms of population taking in Manchester, Sheffield and Leeds. There is a cumulative population of over 5.5 million people within 60 minutes of Holmfirth.

The Glossop catchment also encompasses a large population from the Manchester/Sheffield conurbations. Areas within the National Park such as Buxton, Bakewell and Chatsworth are much smaller taking in mainly the small towns and villages of the Peak District within a 60 minute drivetime with the only large conurbation being Sheffield.

Figure 22: Population within key drive times of main towns

Drivetimes (Minutes)	*Population*	*Cumulative Population*	*Households*	*Cumulative Households*
		Glossop		
0-15	42,476	42,476	18,154	18,154
15-30	748,125	790,601	331,590	349,744
30-45	1,892,756	2,683,357	829,394	1,179,138
45-60	2,207,594	4,890,951	954,455	2,133,593
		Buxton		
0-15	32,298	32,298	14,059	14,059
15-30	152,522	184,820	67,862	81,921
30-45	771,663	956,483	336,792	418,713
45-60	2,230,726	3,187,209	992,862	1,411,575
		Bakewell		
0-15	27,324	27,324	12,225	12,225
15-30	248,984	276,308	110,420	122,645
30-45	788,178	1,064,486	349,123	471,768
45-60	3,011,915	3,011,915	845,574	1,317,342
		Holmfirth		
0-15	69,737	69,737	30,665	30,665
15-30	378,788	448,525	164,593	195,258
30-45	2,264,782	2,713,307	985,417	1,180,675
45-60	2,818,314	5,531,621	1,221,284	2,401,959
		Leek		
0-15	38,108	38,108	16,596	16,596
15-30	405,104	443,212	179,250	195,846
30-45	491,977	935,189	211,695	407,541
45-60	1,681,135	2,616,324	738,110	1,145,651
		Chatsworth		
0-15	24,106	24,106	10,968	10,968
15-30	316,542	340,648	140,844	151,812
30-45	838,501	1,179,149	367,345	519,157
45-60	1,758,931	2,938,080	767,386	1,286,543

Source: MapPoint Europe 2013

In all areas and within all drivetimes the majority of the population within the Peak District earn between £20K and £29,999. However, wealthier areas include the immediate catchment surrounding Chatsworth.

Figure 23: Income of the population within key drivetime catchments

Drivetimes (Minutes)	*Household Income <£10K*	*Household Income £10k-£19,999K*	*Household Income £20K-£29,999K*	*Household Income £30k +*
		Glossop		
0-15	12%	27%	38%	24%
0-30	15%	29%	40%	16%
0-45	14%	29%	39%	18%
0-60	15%	29%	40%	17%
		Buxton		
0-15	12%	27%	38%	23%
0-30	11%	26%	39%	25%
0-45	12%	27%	39%	22%
0-60	15%	29%	39%	17%
		Bakewell		
0-15	10%	26%	37%	27%
0-30	13%	28%	39%	21%
0-45	15%	29%	39%	16%
0-60	15%	29%	39%	17%
		Holmfirth		
0-15	12%	26%	40%	23%
0-30	14%	27%	39%	20%
0-45	16%	30%	40%	14%
0-60	40%	11%	21%	28%
		Leek		
0-15	11%	27%	40%	22%
0-30	15%	30%	40%	15%
0-45	13%	28%	39%	19%
0-60	14%	28%	39%	20%
		Chatsworth		
0-15	9%	24%	36%	31%
0-30	14%	28%	39%	19%
0-45	15%	30%	39%	16%
0-60	15%	29%	39%	17%

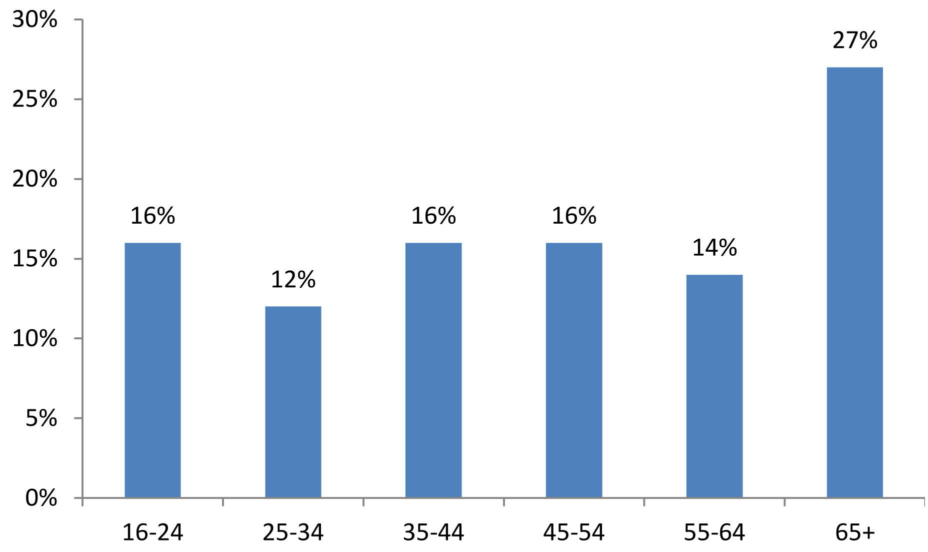
Source: MapPoint Europe 2013

In all areas and within all drivetimes the majority of the population within the Peak District earn between £20K and £29,999. However, wealthier areas include the immediate catchment surrounding Chatsworth.

The Visit England Great Britain Day Visits Survey estimates that there were **23.02 million day visits** made to Derbyshire in 2011 that spent a total of £673.83 million.

The survey gives further information about the distinct characteristics of day visitors to Derbyshire and shows that day visitors are predominantly older.

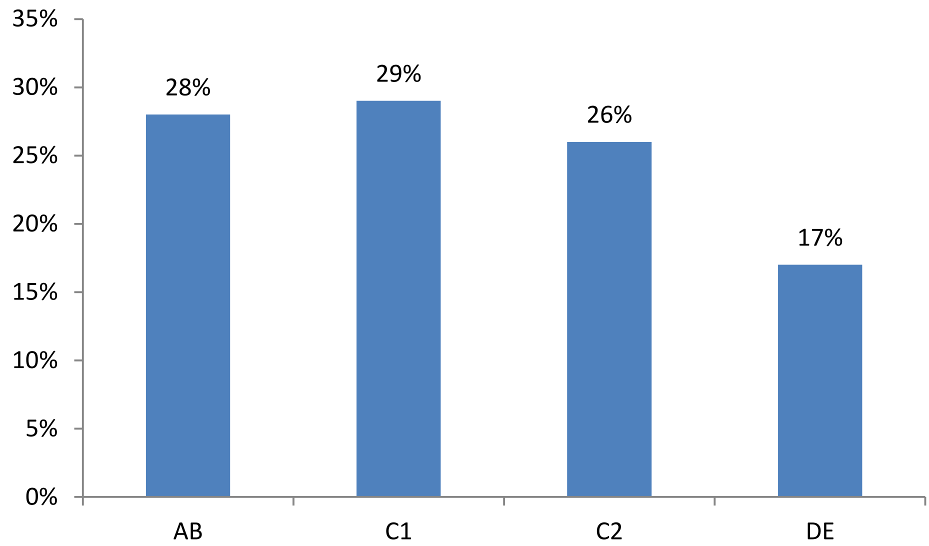
Figure 24: Age profile of day visitors



Source: GBDVS

Day visitors tend to consistent of people who sit in relatively high social grade categories i.e. C1 or AB.

Figure 25: Social grade of day visitors

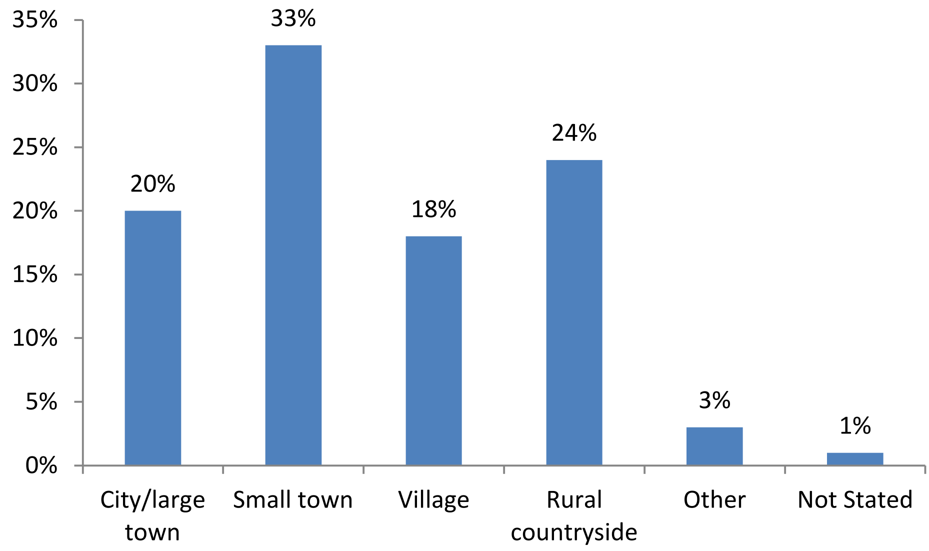


Source: GBDVS

Most day visitors (79%) have no children currently living in their household indicating a high number of either childless couples or 'empty nesters'.

The reasons for a day visit within Derbyshire are most likely to be to visit friends or relatives (34%) but undertaking outdoor activities is also a popular reason for a visit (24%). Day visitors commonly spend between 3 and 4 hours in Derbyshire on a day visit and their day visit destination within Derbyshire is most likely to be a small town.

Figure 26: Day visit destination



Source: GBDVS

3.2 STAYING VISITORS

3.2.1 DERBY

The data shows that in 2009-11, there were about **513,000 trips** made each year to Derby. 30% of these were holiday trips (156,000).

In 2009-11 total spend of domestic staying visitors was **£66 million** with 45% of this spend coming from those on holiday trips (£30 million).

Figure 27: Volume of staying visits to Derby

	Derby (thousands)				
Trend Type	*2006-8*	*2007-9*	*2008-10*	*2009-11*	*% Change 2006-2011*
Total Trips	469	459	472	513	9%
Total Holiday Trips	136	163	135	156	15%
Total Nights	1,105	1,125	1,206	1,215	10%
Total Holiday Nights	332	433	375	390	17%

Source: Visit England GBTS

Interestingly, the number of holiday trips has risen in recent years and staying visitors are also increasingly staying for longer in the city.

Holiday makers are also spending more over time as are other types of visitors.

Figure 28: Visitor Spend

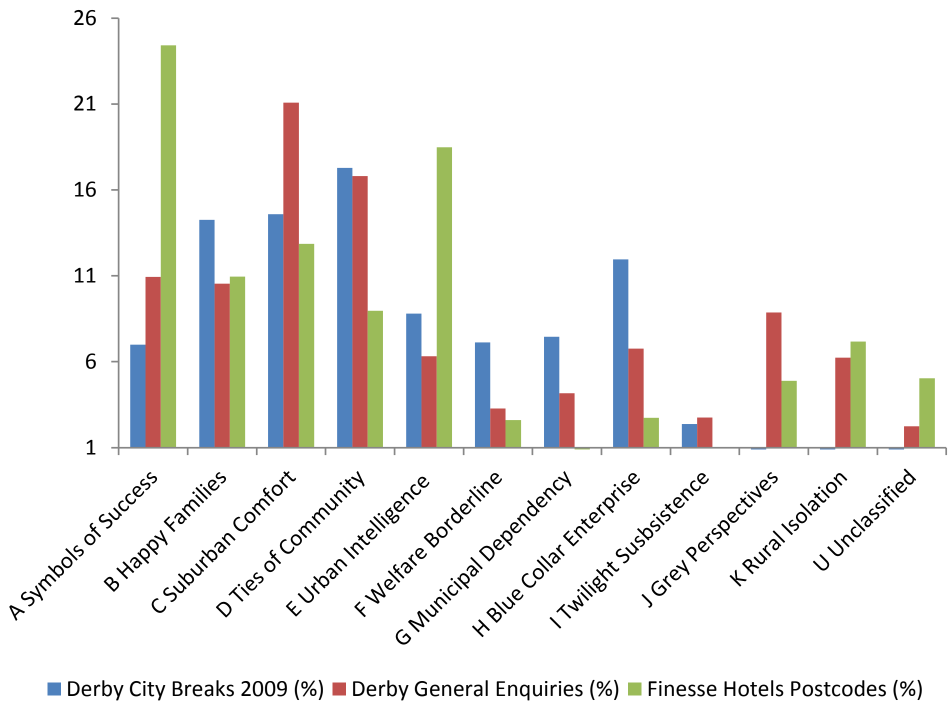
	Derby (millions)				
Spend	*2006-8*	*2007-9*	*2008-10*	*2009-11*	*% Change 2006-2011*
Total Spend	58	55	61	66	14%
Holiday Spend	15	23	26	30	100%

Source: Visit England GBTS

In Derby, the average length of a trip is 2.4 nights whereas holiday makers to the city spend an average of 2.5 nights which is longer than for other types of trips. Total average spend in the city is around £128.70 per person.

The Destination Derby Visitor Economy Strategy published in 2011 uses consumer segmentation model MOSAIC to profile visitors by type. Data has been taking from a number of sources including hotels and also presumably the TIC.

Figure 29: MOSAIC Analysis Derby



Source: Destination Derby Visitor Economy Strategy 2011

The analysis gives an interesting insight into the types of visitors which Derby attracts from different segments. For example, those visitors most likely to go on a city break in Derby are ‘Ties of Community’, ‘Suburban Comfort’ and ‘Happy Families’. However, the lower income segments such as ‘Blue Collar Enterprise’ are also likely to be city break visitors.

In contrast the hotel visitors come primarily from the higher income segments like ‘Symbols of Success’. General enquiries about Derby come from all segments but mainly from middle income segments like ‘Suburban Comfort’ and ‘Ties of Community’.

3.2.2 PEAK DISTRICT AND DERBYSHIRE

1.9 million trips were made each year to Derbyshire between 2009-11. Almost half of these trips were made for holiday purposes.

The number of holiday trips to the county is increasing by the most significant proportion and holiday visitors are increasingly spending longer in the county.

Figure 30: Volume of trips to Derbyshire

	Derbyshire (thousands)				
Trend Type	*2006-8*	*2007-9*	*2008-10*	*2009-11*	*% Change 2006-2011*
Total Trips	1,756	1,705	1,757	1,909	9%
Total Holiday Trips	787	850	891	940	19%
Total Nights	4,790	4,841	5,020	5,032	5%
Total Holiday Nights	2,359	2,648	2,822	2,810	19%

Source: Visit England GBTS

Total visitor spend and total holiday visitor spend have continued to increase since 2006.

Figure 31: Visitor Spend in Derbyshire

	Derbyshire (millions)				
Spend	*2006-8*	*2007-9*	*2008-10*	*2009-11*	*% Change 2006-2011*
Total Spend	214	216	228	256	20%
Holiday Spend	106	125	140	155	46%

Source: Visit England GBTS

Over half of all trips to Derbyshire are for holiday reasons whether this is a pleasure/leisure holiday trips or a holiday whilst visiting friends or relatives.

20% of people visit the county purely to visit friends or relatives and 14% come for business reasons.

Figure 32: Purpose of Trip to Derbyshire

Purpose of Trip	%
(1) Holiday, Pleasure/leisure	45%
(2) Holiday, visiting friends or relatives	14%
(3) Other visits to friends or relatives	20%
(4) Attend conferences	1%
(5) Attend Exhibition/Trade Show/Agricultural show	1%
(6) Contract Paid Work / On business	14%
(7) Travel/Transport is my business	0%
(8) School Trip	3%
(9) Other purpose	2%
TOTAL	100%

Source: Visit England GBTS (2011-2012)

The majority of visitor spend goes on accommodation costs followed by travel costs to and from the county. Eating and drinking out also make up a significant proportion of spend.

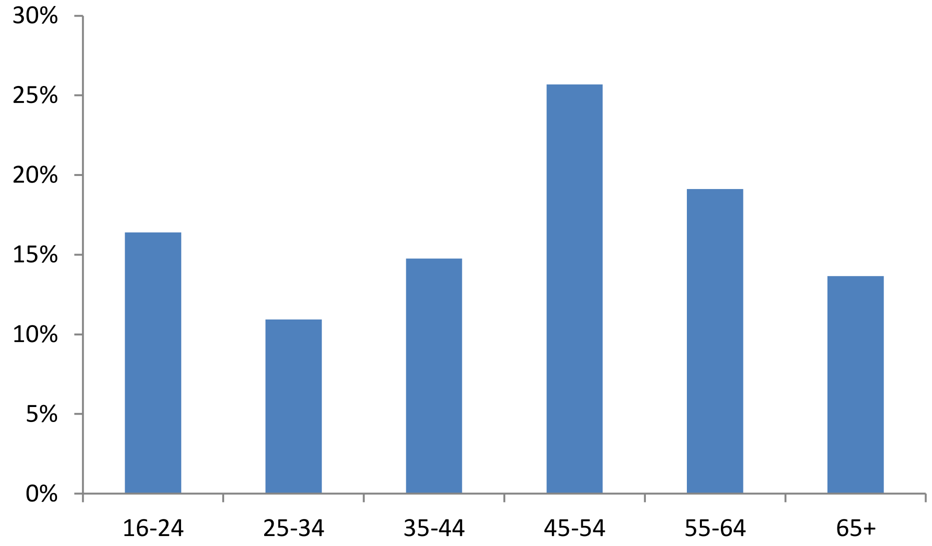
Figure 33: Spend Items

Expenditure Type	*Derbyshire %*
Accommodation	38%
Travel costs to and from destination, and during the trip	19%
Eating and drinking out	18%
Other shopping	11%
Entertainment	6%
Buying clothes	4%
Price of package holiday/inclusive trip	2%
Anything else	2%
Services or advice (e.g. travel guides, tourist information)	1%
TOTAL	100%

Source: Visit England GBTS (2011- 2012)

Of staying visitors to Derbyshire a large proportion are older, there are a significant number between the ages of 45-54.

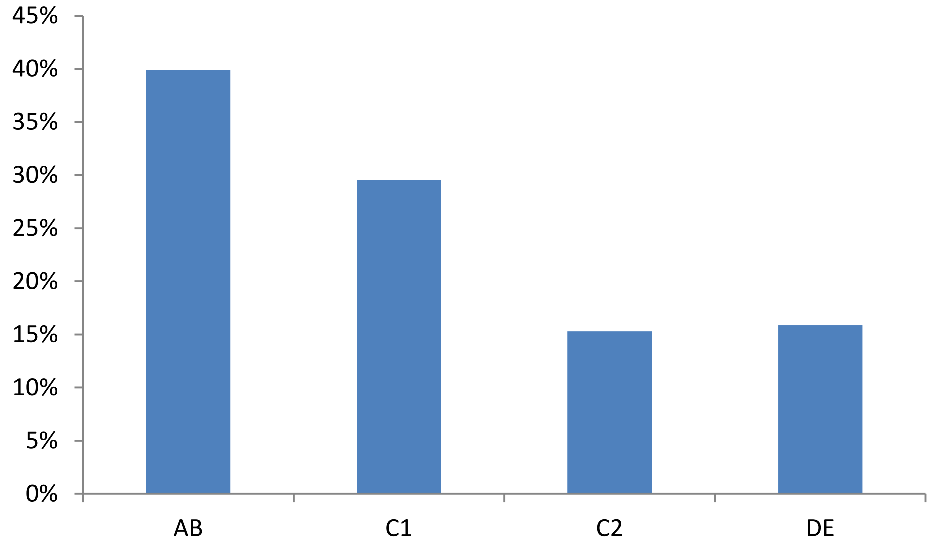
Figure 34: Age



Source: Visit England GBTS (2011- 2012)

Staying visitors also tend to be primarily in group AB i.e. in professional/managerial occupations.

Figure 35: Socioeconomic Group



Source: Visit England GBTS (2011- 2012)

The statistics show that Derbyshire Dales followed by Derby City generate the largest number of staying trips.

Figure 36: Visitor Volume and Value by Local Authority

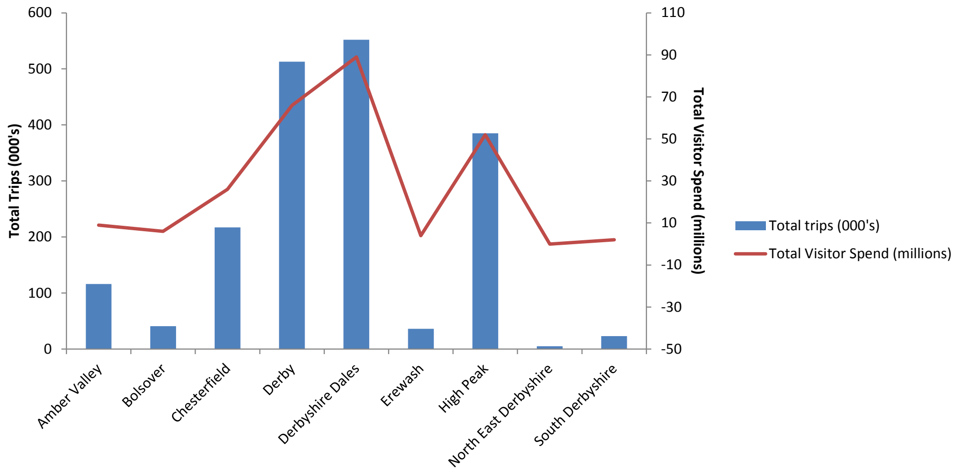
Area of Derbyshire	*Total trips (000's)*	*Holiday trips (000's)*	*Total nights (000's)*	*Holiday nights (000's)*	*Total visitor spend (millions)*
Amber Valley	116	24	271	43	9
Bolsover	41	7	110	12	6
Chesterfield	217	75	427	168	26
Derby	513	156	1,215	390	66
Derbyshire Dales	552	422	1,679	1386	89
Erewash	36	5	82	9	4
High Peak	385	226	1,099	723	52
North East Derbyshire	5	-	10	-	-
South Derbyshire	23	5	46	6	2
Derbyshire Total	**1909**	**940**	**5032**	**2810**	**256**

Source: Visit England GBTS (2009-11)

Derbyshire Dales however, generates significantly higher visitor spend compared to Derby city despite very similar numbers of trips. High Peak also generates a high proportion of trips and spend.

Generally, the areas outside of the Peak District are thought to have seen the fastest growth of tourism in recent years because of fewer restrictions on development and availability of sites.

Figure 37: Total trip volumes and total visitor spend, by local authority



Source: Visit England GBTS (2009-11)

The International Passenger Survey for 2012 shows that there are an additional **169,000 overseas visitors** coming to Derbyshire who spend about 1 million nights in the county and spend £64 million in the local economy.

The majority of International visitors are in Derbyshire to visit friends or relatives (39%) closely followed by those there for business (36%). These people also spend the longest in the area. However, Business visitors to the county spend the most.

Figure 38: International Visitors

Purpose of Trip	*Visits (000's)*	*Nights (000's)*	*Spend (millions)*
Business	36%	33%	55%
Holiday	21%	17%	15%
Other	4%	3%	3%
Study	0%	0%	0%
VFR	39%	47%	27%

Source: IPS 2012

ACORN – Who are your visitors?

Very little information currently exists about the *profile* of visitors to Derbyshire and the Peak District. We have profiled the database of Visit Peak District and Derbyshire in order to attempt to fill this gap and provide a sense of who the visitors to the Peak District are.

The database profiled was a list of c.2, 130 visitor postcodes which were taken from visitors to the area who had booked accommodation through Visit Peak District and Derbyshire in 2012.[5] We have also done a separate analysis of visitors by accommodation type booked.

ACORN, developed by CACI Ltd, is a UK consumer segmentation tool that classifies people by the neighbourhoods in which they live. It segments households, postcodes and neighbourhoods into *6 categories, 18 groups and 62 types.* By analysing significant social factors and population behaviour, it provides precise information and an in-depth understanding of the different types of people.

The five main categories can be summarised as;

Wealthy Achievers: These are some of the most financially successful people in the UK. They live in wealthy, high status rural, semi-rural and suburban areas of the country. Middle aged or older people, the 'baby-boomer' generation, predominate with many empty nesters and wealthy retired. Some neighbourhoods contain large numbers of well-off families with school age children, particularly the more suburban locations.

Rising Prosperity: These are generally younger, well educated, and mostly prosperous people living in our major towns and cities. Most are singles or couples, some yet to start a family, others with younger children. Often these are highly educated younger professionals moving up the career ladder.

[5] The database only reflects a small percentage of visitors to the Peak District and therefore, there is a chance that these visitors are those who are more likely to respond the marketing from Visit Peak District rather than a true reflection of the areas visitors.

Comfortable Communities: This category contains much of middle-of-the-road Britain, whether in the suburbs, smaller towns or the countryside. All life stages are represented in this category. Many areas have mostly stable families and empty nesters, especially in suburban or semi-rural locations. There are also comfortably off pensioners, living in retirement areas around the coast or in the countryside and sometimes younger couples just starting out on their lives together.

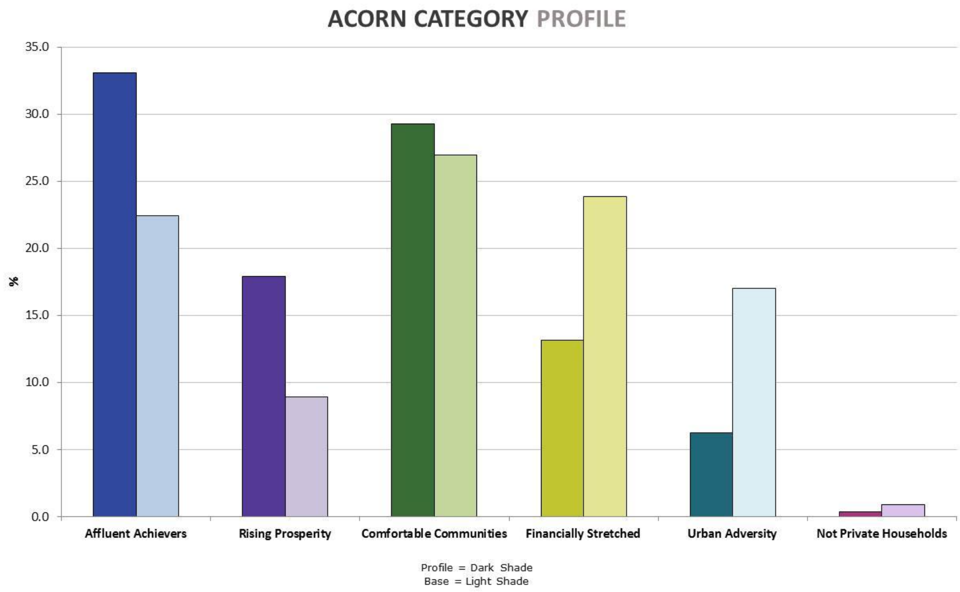
Financially Stretched: This category contains a mix of traditional areas of Britain. Housing is often terraced or semi-detached, a mix of lower value owner occupied housing and homes rented from the council or housing associations, including social housing developments specifically for the elderly. This category also includes student term-time areas. There tends to be fewer traditional married couples than usual and more single parents, single, separated and divorced people than average.

Urban Adversity: This category contains the most deprived areas of large and small towns and cities across the UK. Household incomes are low, nearly always below the national average. The level of people having difficulties with debt or having been refused credit approaches double the national average. The numbers claiming Jobseeker's Allowance and other benefits is well above the national average. Levels of qualifications are low and those in work are likely to be employed in semi-skilled or unskilled occupations.

Not Private Households: These are postcodes where the bulk of the residents are not living in private households. These people may be in communal establishments yet still consumers to some degree. This includes defence establishments, for example people living on military bases. It also includes hotels and other holiday accommodation.

Of those who booked bednights (all accommodation types) through Visit Peak District and Derbyshire, the profile is overwhelmingly affluent compared to the average or the 'base'. The Peak District attracts primarily affluent achievers and rising prosperity and attracts less than the average of those types of visitors who are financially stretched or urban adversity.

Figure 39: Main ACORN Categories

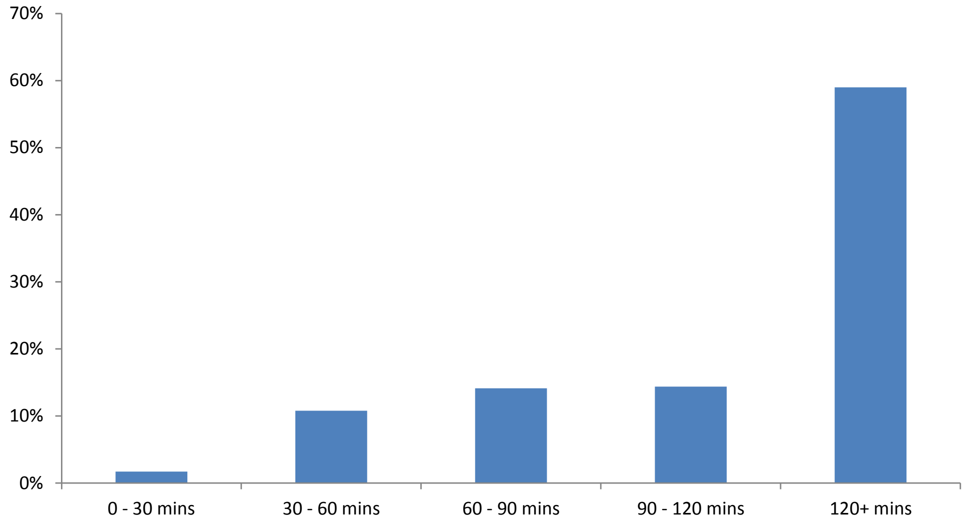


Source: CACI 2012

However, when visitors are analysed by the type of accommodation they booked this shows that comfortable communities and financially stretched are most likely to go camping or caravanning, comfortable communities are most likely to use self-catered properties and affluent achievers are most likely to use serviced accommodation.

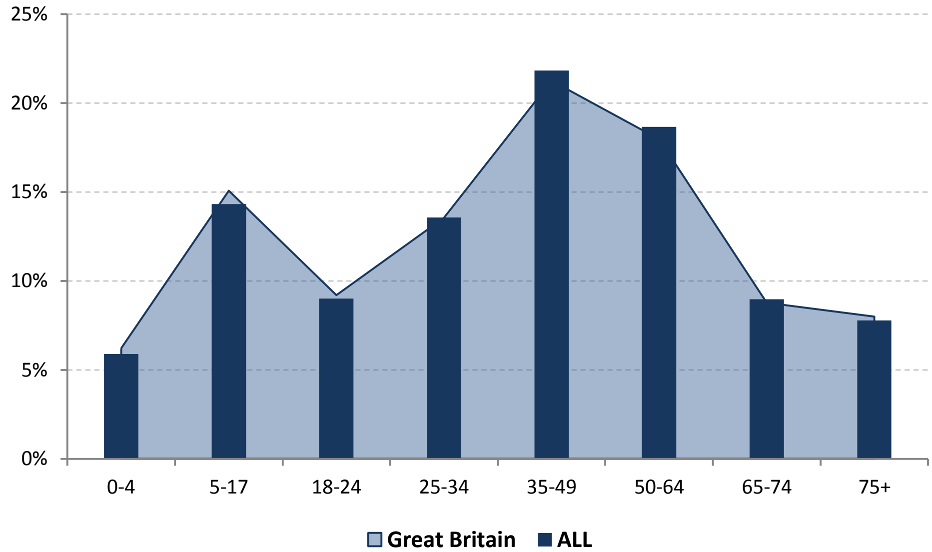
The postcode data from Visit Peak District and Derbyshire also allowed a drive time analysis to be conducted to show how far afield domestic visitors travel from to visit the Peak District. From a central point within the Peak District National Park the analysis shows that the majority of staying visitors will travel 120 minutes or more to visit the area. The reasons for this may include the possibility that visitors travelling from further afield are more likely to book accommodation through a tourist board due to lack of local knowledge.

Figure 40: Drive time analysis of domestic visitors to the Peak District



The age profile of visitors is likely to reflect a high number of middle aged people visiting the area with a peak in the number of 35-64 year olds. The peak in the 5-17 year old category may also reflect a high number of families.

Figure 41: Age profile of visitors to the Peak District



Source: CACI 2012

Most visitors however, are likely to have no children still at home and the household structure will typically be 2-3 people per household.

3.3 SPECIAL INTEREST & NICHE VISITOR MARKETS

There are destinations within Derbyshire that are working to increase coach tourism i.e. Chesterfield.

A coach holiday is defined as any holiday (e.g. at least one night spent away from home) that involves coach transport. In 2011 the volume of the coach market was estimated at 8.44m with a value of £1.9m. TGI data reveal that 6.2% of holidaymakers took a coach tour in the 12 months (2010). Domestic coach tourism takes much of the volume but overseas coach tourism is worth more.

In terms of the types of consumers which take coach holidays only 15% have taken a coach holiday in the last 5 years. There is a clear gender divide in the types of people taking coach holidays with more women than men going on these types of holidays. Consumers from the AB and C1 socio-economic groups are the most likely to say that haven't been on a coach holiday and would not consider it.

Destinations which encourage coach tourism are set to take advantage of an ageing population and the 'budget' positioning of this form of holiday post-recession.

Walking and cycling markets are also likely to be key special interest groups within Derbyshire.

Around 42% of UK adults take part in walking, hiking or rambling regularly or occasionally. Walking, hiking or rambling is popular across all age groups and income brackets. 22% of the population has taken a walking holiday at least once in the last 5 years.

Around 14 % of adults in the UK are regular or occasional cyclers. (3.5m bikes are sold in the UK each year). Around 2.5% of adults in the UK are regular or occasional mountain bikers. There are twice as many male cyclers as there are female. Cycling amongst women however is now seeing growth after years of decline. Cycling is most popular amongst relatively young people with high incomes. 7% of the population has taken a cycling holiday at least once in the last 5 years.

Derbyshire is an attractive destination for many outdoor activities and participation in a number of activities is detailed in Figure 42.

Figure 42: Participation in outdoor activities[6]

Sport/Activity	*% of population taking part at least once a month*
Walking	20.0%
Jogging	17.0%
Cycling	7.9%
Golf	2.8%
Angling	2.2%
Equestrian	0.9%
Mountaineering	0.5%
Snowsports	0.4%
Sailing	0.3%
Canoeing	0.3%
Shooting	0.3%
Rowing	0.1%
Fell Running	0.06%
Orienteering	0.03%
Kite Surfing	0.03%
Caving	0.02%
Snorkelling	0.02%

Source: Mintel

[6] These figures correspond with the Sports England Active People Survey

4 PRODUCT AUDIT

4.1 OVERVIEW

This next section reviews in more detail the facilities which exist for visitors in the area. Information has been gathered through a combination of desk research and site visit audits. Each sub section includes a map as well as a description. The tables which accompany the maps can be requested in a separate excel file.

4.2 ACCESS

Derbyshire and the Peak District are served by a network of major and minor roads which generally provide excellent access to/ from and around the area. The main routes from the north and south are via the M1 and M6 motorways which run along the eastern and western edges of Derbyshire and act as important visitor access 'spines'.

A number of 'A' roads run through the Peak District National Park itself, linking the major urban centres of Manchester, Derby, Sheffield and Stoke-on-Trent with many of the key tourist hubs such as Buxton, Bakewell, Matlock and Belper (primarily the A628, A623, A6, A515, A53, A54 and A537). A network of smaller roads link other towns and villages throughout the area.

By contrast, rail services around the area are somewhat patchy. As Figure 43 shows, rail links are excellent to and from Derby with travel times to and from London just over an hour and a half. Rail links between Derby, Chesterfield and Sheffield are also quick and regular.

Chesterfield also has excellent rail connections with frequent services to London taking just over two hours and with good links to Manchester, Birmingham, Leeds and Glasgow. Services running east and west between Manchester and Sheffield are also regular and quick.

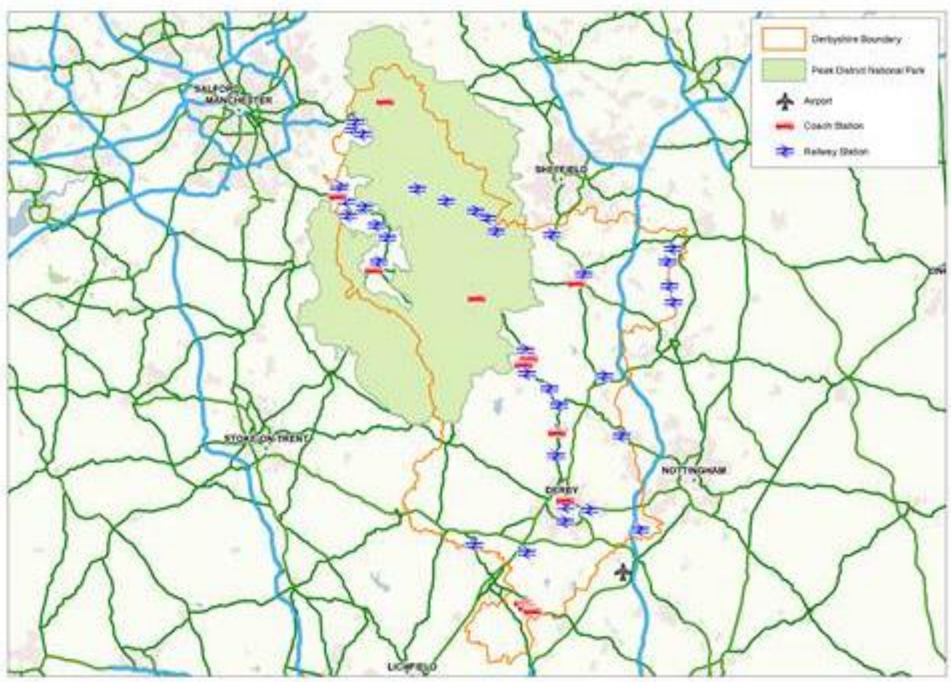
Within the Peak District National Park itself there is a stopping service which runs between Manchester and Buxton operated by Northern Rail. There is also a local stopping service run by Transpennine Express connecting Sheffield and Manchester which calls at a number of stations towards the north of the Park such as Edale.

Arguably, whilst compared to several other National Parks the Peak District has a good rail network, the service is still somewhat lacking. Large parts of the area are without rail links and the services which stop at local stations within the park are slow and infrequent. In many cases, the rolling stock provided by the operators on these services is old, noisy and out-dated. Consultations with stakeholders suggested that this weakness in the offer is limiting the opportunity to attract visitors and to encourage sustainable travel around the area. Proposals to reopen the Matlock to Buxton line are mentioned in the East Midlands Trains strategy but are seen as too expensive to form part of the short or medium terms plans.

There are National Express Coach stations in the major towns and cities of Sheffield, Manchester, Derby, Chesterfield, Matlock and Matlock Bath as well as in Bakewell and Buxton.

East Midlands International Airport, just outside of the county, has direct flights to 90 destinations in the UK, Europe and further afield. Manchester Airport is also within easy reach of the western Peak District with an extensive network of short haul and long haul destinations.

Figure 43: Main Access Points



Source: Colliers International

There is an abundance of cycle and walking routes running through the county which offer easy access from the East of Manchester, Derby and Sheffield. Cycling and walking facilities are reviewed separately later in this section.

The Visit England Brand and Visitor Satisfaction Tracker 2011-12 references the ease of using public transport in the Peak District as a medium level weakness of the area. Whilst public transport is more limited in certain areas within some areas of the National Park, many areas on the edge of the park are reasonably well served by public transport.

In terms of access to information about public transport in the Peak District, this is a significant issue with fragmented and complex public transport information and no integrated information solution in place. This is perhaps one of the reasons why visitor's perceptions of public transport in the VE brand tracker survey were mostly negative.

4.3 ATTRACTIONS

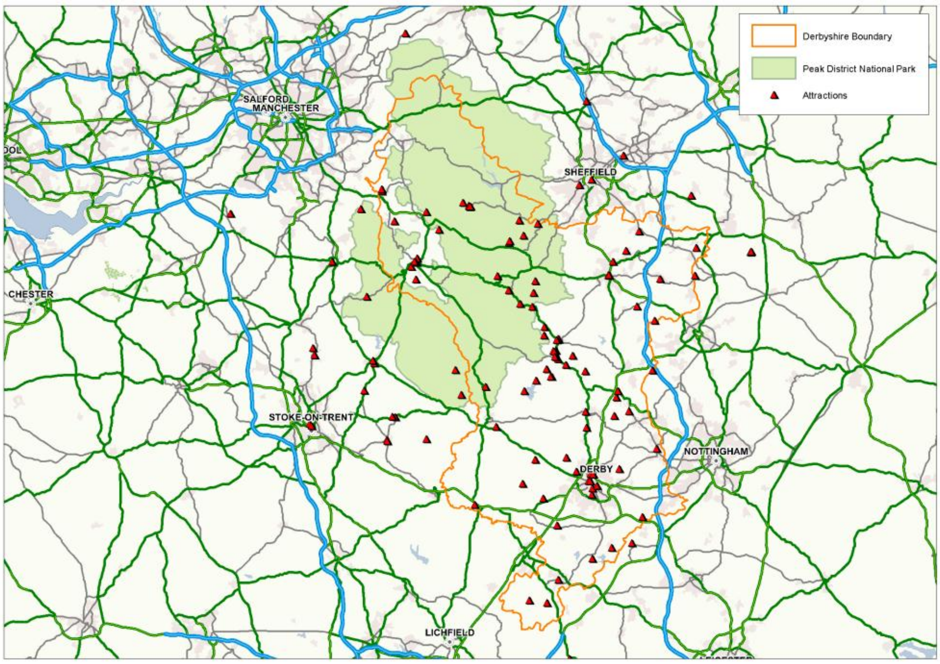
4.3.1 GENERAL ATTRACTIONS

Derbyshire is well known for its heritage attractions and historic houses, the most iconic of these being Chatsworth House. Chatsworth House attracts over 700,000 visitors a year and is a major draw within the region. There are a number of lesser known historic houses and historic sites many of which are owned by the National Trust.

The majority of attractions in Derbyshire charge for entry and in fact all of those located within the Peak District are charging. Many attractions located outside of the park are free, particularly those in larger conurbations like Derby and Chesterfield.

Interestingly the number of visits to charging attractions in Derbyshire increased between 2010-11 whilst visits to free attractions tended to either decline or stay the same.

Figure 44: Visitor Attractions



Source: Colliers International

Many of the major visitor attractions are located along main roads which provide good access. There is less provision towards the north of the county.

Figure 45: Attractions Visitor Numbers

Derbyshire	* = Derby City							
Attraction Sector	*Attraction Name*	*2007*	*2008*	*2009*	*2010*	*2011*	*% Change 10/11*	*Entry Price*
	CHARGED							
Historic Property	Chatsworth	606,689	553,000	652,969	716,616	722,906	0.9%	£16.00
Historic Property	Calke Abbey	113,583	123,000	242,000	238,000	278,111	16.9%	£8.00
Historic Property	Hardwick Hall	136,745	121,959	144,238	163,000	176,992	8.6%	£9.98
Historic Property	Sudbury Hall	0	177,556	165,851	159,178	166,031	4.3%	£7.09
Historic Property	Kedleston Hall	91,663	107,638	135,453	126,141	145,277	15.2%	£8.90
Railway	Midland Railway - Butterley	110,000	0	0	100,000	95,000	-5.0%	£13.50
Historic Property	Bolsover Castle	61,524	64,705	74,518	60,332	69,248	14.8%	£7.80
Historic Property	Haddon Hall	0	54,938	59,028	50,338	53,818	6.9%	£9.50
Historic Property	Hardwick Old Hall	48,701	44,886	48,026	49,937	49,774	-0.3%	£4.80
Historic Property	Peveril Castle	49,334	53,804	54,179	48,477	46,611	-3.8%	£4.30
Visitor Centre	Creswell Crags	0	30,000	0	37,000	40,000	8.1%	£13.00
Museum and/or Gallery	Eyam Museum	0	27,326	29,183	29,467	26,179	-11.2%	£2.00
Railway	Steam Railway	0	0	0	8,000	25,000	212.5%	£10.00
Museum and/or Gallery	Peak District Mining Museum	0	11,824	11,771	10,723	9,852	-8.1%	£3.50
Museum and/or Gallery	Bakewell Old House Museum	0	8,563	8,062	8,380	8,084	-3.5%	£3.00
Visitor Centre	Heage Windmill	0	5,842	5,537	6,016	6,500	8.0%	£3.50
Historic Property	Melbourne Hall and Gardens	0	6,063	5,882	6,316	5,260	-16.7%	£6.50
Garden	The Burrows Gardens	0	3,000	2,000	2,700	2,553	-5.4%	£4.00
Historic Property	Tissington Hall	2,106	0	0	2,428	1,958	-19.4%	£8.50
Historic Property	Wingfield Manor	155	259	237	297	275	-7.4%	£5.30
	FREE							
Place of Worship	Crooked Spire Church	0	0	0	0	120,000	0.0%	£0.00
Visitor Centre	Sharpe's Pottery Museum	50,746	35,552	40,000	40,000	59,699	49.2%	£0.00
Museum and/or Gallery	Derby Museum & Art Gallery*	0	94,399	96,055	75,925	59,608	-21.5%	£0.00
Place of Worship	Derby Cathedral*	0	50,000	55,000	41,000	43,966	7.2%	£0.00
Visitor Centre	National Stone Centre	40,000	40,000	40,000	40,000	40,000	0.0%	£0.00
Museum and/or Gallery	Chesterfield Museum and Art Gallery	22,014	25,372	22,503	24,262	26,350	8.6%	£0.00
Museum and/or Gallery	Silk Mill - Derby's Museum of Industry and History*	0	29,845	38,372	40,063	26,042	-35.0%	£0.00
Historic Property	Pickford's House Museum*	21,176	20,547	20,468	21,473	18,265	-14.9%	£0.00
Museum and/or Gallery	Revolution House	3,851	4,814	2,946	3,958	4,000	1.1%	£0.00
Place of Worship	St Mary's Bridge Chapel*	450	400	8,000	581	726	25.0%	£0.00
Visitor Centre	St John's Chapel & Heritage Centre	650	650	650	650	650	0.0%	£0.00
Museum and/or Gallery	The Roundhouse Gallery	0	800	700	600	600	0.0%	£0.00
Museum and/or Gallery	Torrs Hydro	0	0	500	500	500	0.0%	£0.00
Historic Property	High Peak Junction Workshops	0	2,050	1,276	895	89	-90.1%	£0.00

Source: Visit England

It is worth noting that there are a whole host of smaller niche attractions across the region which adds significantly to the county’s offer. However, more creative ways may need to be found to get these attractions onto the mainstream tourist trail.

There are a 129 attractions listed on the Destination Management System (DMS) provided by Visit Peak District & Derbyshire.

Figure 46: Attractions listed on DMS

	Venue Name	Location
1	Allestree Park	Derby
2	Alton Towers Resort	Staffordshire
3	Ardent Raceway	Derby
4	Arkwright's Cromford Mills	Matlock
5	Bakewell Old House Museum	Derbyshire
6	Barrow Hill Roundhouse Railway Centre	Chesterfield
7	Beehive Farm Woodland Lakes	Derbyshire
8	Belper River Gardens	Ripley
9	Biddulph Grange Garden	Stoke-on-Trent
10	Blackbrook Zoological Park	Staffordshire
11	Blaze Farm	Cheshire
12	Blue John Cavern	Hope Valley
13	Bluebells Dairy	Derby
14	Bolsover Castle	Chesterfield
15	Brindley's Mill & James Brindley Museum	Staffordshire
16	Bryer's Heritage Farm @ Home Farm	Derby
17	Bugsworth Basin	Whaley Bridge
18	Buxton Museum & Art Gallery	Derbyshire
19	Buxton Raceway Ltd	High Peak
20	Calke Abbey	Ticknall
21	Carsington Water Visitor Centre	Ashbourne
22	Caudwell's Mill	Matlock
23	Chatsworth	Bakewell
24	Chatsworth Garden Centre	Matlock
25	Cheddleton Flint Mill & Museum	Stoke-on-Trent
26	Chesterfield Canal	Chesterfield
27	Chesterfield Museum and Art Gallery	Chesterfield
28	Chestnut Centre Otter, Owl & Wildlife	High Peak
29	Churnet Valley Railway	Froghall
30	Clumber Park	Nottinghamshire
31	Consall Hall Landscape Gardens	Stoke-on-Trent
32	Creswell Crags	Whitwell
33	Crich Stand	Matlock
34	Crich Tramway Village	Derbyshire
35	Crooked Spire Church	Chesterfield
36	Darley Park	Derby
37	David Mellor Design Ltd	Sheffield
38	Denby Pottery Visitor Centre	Derbyshire
39	Derby Arboretum	Derby
40	Derby Cathedral	Derby
41	Derby Cathedral Centre	Derby
42	Derby Gaol	Sutton on the Hill
43	Derby Museum & Art Gallery	Derby
44	Derby's Museum of Industry and History	Derby
45	Derwent Valley Mills World Heritage Site	Derbyshire
46	Donington Park	Derby
47	Ecclesbourne Valley Railway	Wirksworth
48	Erewash Museum	Derbyshire
49	Eyam Hall Historic House	Derbyshire
50	Eyam Museum	Hope Valley
51	Foxfield Steam Railway	Staffordshire
52	Freshfields Donkey Village	Derbyshire
53	Gallery in the Gardens	Buxton
54	Gulliver's	Derbyshire
55	Haddon Hall	Bakewell
56	Hall Leys Park	Matlock
57	Hardwick Estate	Chesterfield
58	Hardwick Old Hall	Chesterfield
59	Heage Windmill	Nr Belper
60	Heanor Heritage Centre	Heanor
61	Heights of Abraham	Matlock
62	High Peak Junction Workshops	Middleton by Wirksworth
63	Highfields Happy Hens	Etwall
64	Hope House Costume Museum	Ashbourne
65	Hopton Hall	Wirksworth

Figure 47: Attractions listed on DMS continued......

66	Ilam Park	Nr Ashbourne
67	John King Workshop Museum	Nottingham
68	Kedleston Hall	Derbyshire
69	Kingsley Bird & Falconry Centre	Stoke-on-Trent
70	Langwith Whaley Thorns Heritage Centre	Mansfield
71	Lea Gardens	Lea
72	Leawood Pump	Derbyshire
73	Little Chester Heritage Centre	Chester Green
74	Longshaw Estate	Worksop
75	Lyme Park, House and Garden	Disley
76	Macclesfield Heritage Centre	Cheshire
77	Magna Science Adventure Centre	Rotherham
78	Markeaton Park	Derby
79	Matlock Bath Aquarium	Matlock
80	Matlock Farm Park	Birdwell
81	Melbourne Hall and Gardens	Derby
82	Mercia Marina	Derby
83	Midland Railway - Butterley	Ripley
84	Moorland Discovery Centre	Derbyshire
85	National Sikh Heritage Centre	Derby
86	National Stone Centre	Matlock
87	New Mills Heritage & Information Centre	High Peak
88	Nicholson Gallery and Museum	Stockwell Street
89	Padley Manor, Gatehouse & Chapel	Hope Valley
90	Peak Cavern - 'The Devil's Arse'	Castleton
91	Peak District Mining Museum	Matlock
92	Peak Rail	Derbyshire
93	Peveril Castle	Hope Valley
94	Pickford's House Museum	Derby
95	Pollyanna Pickering Gallery	Oaker
96	Poole's Cavern & Country Park	Derbyshire
97	Pugin Heritage Visitor Centre	Cheadle
98	QUAD	Derby
99	Queen's Park	Chesterfield
100	Red House Stables & Carriage Museum	Matlock
101	Renishaw Hall and Gardens	Sheffield
102	Revolution House	Chesterfield
103	Royal Crown Derby Visitors Centre	Derby
104	Rudyard Lake Steam Railway	Garstang
105	Sealwood Cottage Vineyard	Swadlincote
106	Shardlow Heritage Centre	Shardlow
107	Shardlow Marina	London Road
108	Sharpe's Pottery Museum	Derbyshire
109	Sheffield Botanical Gardens	Sheffield
110	Sheffield Millennium Galleries	Sheffield
111	Sir Richard Arkwright's Masson Mills	Matlock Bath
112	Speedwell Cavern	Derbyshire
113	St Giles' Catholic Church, Cheadle	Stoke-on-Trent
114	Standedge Tunnel & Visitor Centre	Marsden
115	Strutt's North Mill	Belper
116	Sudbury Hall & NT Museum of Childhood	Derbyshire
117	Swains Centre	Derbyshire
118	Tatton Park (NT)	Tatton
119	The Burrows Gardens	Brailsford
120	The Herb Garden & Tea Room	Holmewood
121	The Pavilion Gardens	Derbyshire
122	The Roundhouse	Derby
123	Thornbridge Brewery	Derbyshire
124	Tissington Hall	Derbyshire
125	Torrs Riverside Park	New Mills
126	Treak Cliff Cavern	Hope Valley
127	Tropical Butterfly House	Sheffield
128	Twycross Zoo	Warwickshire
129	Wirksworth Heritage Centre	Matlock

Source: DMS

The National Forest has a number of additional attractions including Rosliston Forestry centre which attracts 190,000 visitors a year, Conkers Discovery Centre and Hicks Lodge Cycle Centre amongst the most popular.

There are also a number of areas which act as attractors in their own right and offer land access to visitors for various activities. These include areas like The Roaches, North Lees and the High Peak.

4.3.2 WATER BASED ATTRACTIONS

The Peak District has a number of large reservoirs which have become significant visitor attractions, drawing large numbers of general visitors as well as watersports and other activity enthusiasts.

Carsington Water near Ashbourne is one of the UK's biggest reservoirs at 750 acres. The site offers a range of watersports and fishing as well as routes for cycling and walking. Visitor facilities are extensive and include a visitor centre, a popular café, shop and events programme. There are a number of other significant reservoirs in Derbyshire such as Ladybower, Derwent and Howden which also provide well used facilities such as visitor centres, cafes and cycle hire facilities.

The county also has a large canal network which in a number of places provides the backdrop for well used visitor activities. Chesterfield, for example, is capitalising on this asset with the development of the £310 million Waterside leisure and residential complex.

The Cromford Canal is a key feature of the world heritage site which spans 14.5 miles through the county. The Trent and Mersey Canal also runs through South Derbyshire.

There are also a number of smaller attractions such as Hathersage open air swimming pool.

There are also a large number of marinas including Barton and Stenson Marina and the expanding Mercia Marina in South Derbyshire all of which provide tourist or visitor berths.

4.4 ACCOMMODATION

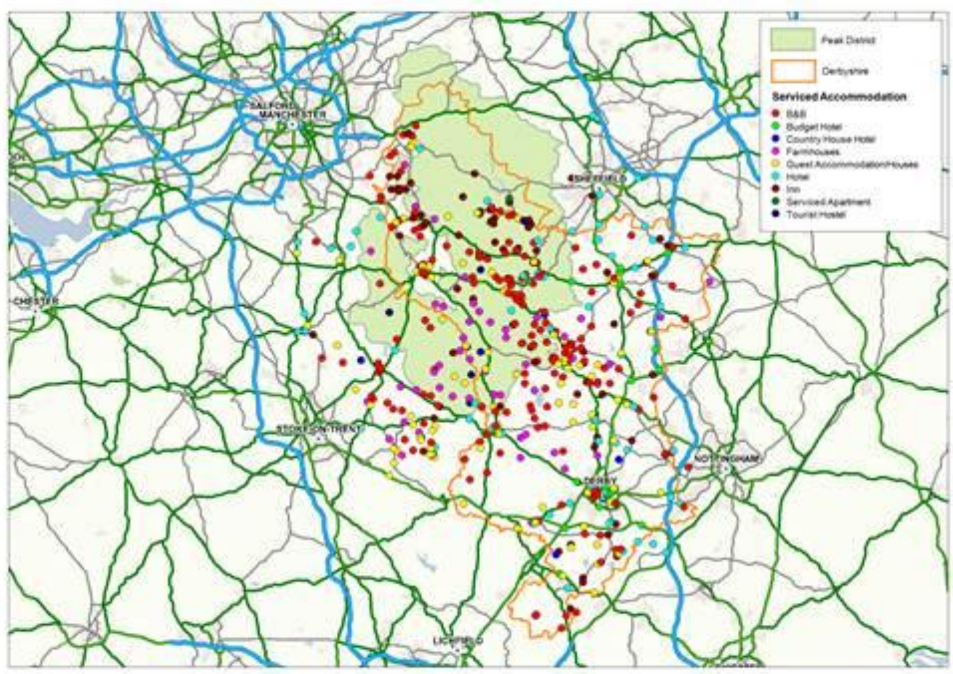
The assessment we have made relating to serviced accommodation in Derbyshire is based both observation and on a database of establishments provided to us by Visit Peak District and Derbyshire.

There is a range of serviced accommodation available in Derbyshire including hotels, B&BS, guesthouses, farmhouses, Inns and serviced apartments.

Figure 48 shows that B&BS are the dominant form of accommodation followed by guesthouses. The mapping exercise has also revealed clusters of serviced accommodation around Derby, Chesterfield, Matlock, Bakewell and Buxton. There is also a reasonably large number of establishments around Glossop.

The serviced accommodation located within Derby and along the M1 corridor is much more likely to include hotels and budget hotels. Unsurprisingly, within the Peak District there is a good supply of B&BS, farmhouses and guesthouses but few hotels. Further to the North of the Peak District there are a number of inns which roughly follow the line of the A623.

Figure 48: Serviced Accommodation



Source: Colliers International/Visit Peak District & Derbyshire

In terms of the quality of the various serviced accommodation establishments, the majority of hotels are 2-3* with a handful of 4* establishments and very few 5* properties. A similar trend is apparent for B&BS and guesthouses although the quality range is much greater. The area offers a handful of very high quality establishments at one end of the spectrum as well as a number of 3-4* and unrated properties.

The Good Hotel Guide 2013 list 16 outstanding establishments in Derbyshire which include hotels, farmhouses and B&B's. The largest of these has 38 bedroom and the smallest 5 bedrooms.

Figure 49: Serviced Accommodation listed in the Good Hotel Guide

	Hotels Listed in the Good Hotel Guide	*Location*	*No. of Bedrooms*	*Description form the Good Hotel Guide*
1	Biggin Hall	Biggin -by-Hartington	20	James Moffat's Grade II listed 17th century building has long been liked by ramblers for its relaxed simplicity and amazingly good value
2	Cathedral Quarter	Derby	38	Near the cathedral, this hotel in Grade II listed buildings has interesting features such as a Scaglioli marble staircase, ornate ceilings, stained glass windows and oak panelling
3	Cavendish	Baslow	24	The staff go out of their way to be helpful at this traditional country hotel on the chatsworth estate
4	Charles Cotton	Hartington	17	This renovated stone-built 17th century coaching inn is run by cheerful helpful staff and hands-on owners..the food is good with some adventurous combinations
5	Chequers Inn	Froggatt Edge	6	In a lovely area for walks straight from the hotel
6	Dannah Farm	Belper	8	This' Derbyshire Dales country B&B is part of a working farm. Many bedrooms have a spa bath; a leisure cabin houses a Finnish sauna, double steam shower and outdoor hot tub
7	Devonshire Arms at Beeley	Beeley	8	'Delightful; first-class service and accommodation; a pleasant stay
8	Fischer's Baslow Hall	Baslow	11	The welcome is always warm; the food is innovative and the service faultless
9	George	Hathersage	24	It is a very happy hotel, giving the impression that the staff really enjoy looking after their guests
10	Grendon	Buxton	5	On a quiet country lane near the town, this B&B is run by hospitable owners…..spacious bedrooms have king sized beds, DVD players and Peak District views
11	Hartington Hall	Buxton	35	Occupying a handsome old manor house on the edge of Dovedale…this upmarket youth hostel is run by the YHA
12	Hodgkinson's	Matlock Bath	8	Most of the comfortable, not luxurious bedrooms have a view over the wooded Derwent valley and craggy limestone crags
13	Losehill House	Hope	21	It has panoramic views over the Hope valley. The solid white-painted house 'exudes style' with comfortable, modern furnishings
14	Manor Farm	Matlock	5	Welcoming and friendly hosts at this excellent B&B in a Grade II listed stone house with historic associations
15	Peacock at Rowsley	Rowsley	16	Generally a very enjoyable and comfortable stay
16	Underleigh House	Hope	5	Down a narrow lane outside a village in the Hope Valley, this popular B&B is well placed for walking in the Peak District

Source: The Good Hotel Guide 2013

Trip Advisor (a consumer led review site) lists 5 of 108 establishments as getting a 5* rating from the people who have stayed there[7]. The CASA hotel in Chesterfield stood out as a particular favourite and ranked No.1. Interestingly, the hotel posts regular responses on Trip Advisor to posts left by customers demonstrating a particularly professional approach. Other hotels of note are the handful of those ‘country hotels’ such as the 4* Breadsall Priory which offer something slightly more unique to the area to its visitors.

Figure 50: 5* Serviced accommodation as rated by Trip Advisor

	Trip Advisor 5 Rated Hotels*	*Location*	*Number of Bedrooms*	*Select Reviews*
1	Casa Hotel	Chesterfield	100	I stayed here for one night and found everything about the hotel splendid in every respect' 'How we wished we could have stayed all week' 'very good experience and will come back!'
2	The Morley Hayes Hotel	Morley	32	The can do attitude and nothing is too is too much trouble seems to be an intrinsic part of the Morley Hayes DNA' 'I'd recommend this hotel to anyone who wants to celebrate a special occasion or just enjoy a relaxing stay in a first class setting with great food and helpful and friendly staff'
3	Peak Edge Hotel	Stonedge	27	Hotel was beautiful, our room even more so. Most beautiful room Ive ever been in' 'They were promoting a 'Chatsworth' mid-week special and agreed to exchange it for tickets to Haddon Hall' 'I would go back every time I am in the Chesterfield Area'
4	Abbeydale Hotel	Chesterfield	12	The hotel is spotlessly clean and very comfortable, a real home from home' ' I will stay here again next time I'm in chesterfield instead of the soulless big brand hotel chains'
5	Coachhouse Hotel	Melbourne	6	I work away most weeks and like to stay somewhere welcoming with character' 'We had the super king-size room which was very clean and comfortable and the breakfast was superb. There is also off-street parking. Well recommended'

Source: Trip Advisor

A comparison of the number of hotels in Derbyshire with well-established destinations like the Lake District, Cornwall and Devon and with destinations

[7] All Tripadvisor information was correct at the time of writing

slightly more similar to Derbyshire like North Yorkshire and Lancashire seems to suggest that Derbyshire is under served, particularly in terms of serviced hotel accommodation.

Figure 51: Number of Establishments compared with other destinations

Area	Total Establishments	Serviced Accommodation: Hotels and similar establishments	Non-serviced Accommodation ("Collective Accommodation Establishments"): Total	Holiday dwellings	Tourist campsites	Other collective accommodation
Derbyshire	**2,077**	**680**	1,397	1,169	181	47
High Peak	514	151	363	303	43	17
Derbyshire Dales	1,067	299	768	663	86	19
South Derbyshire	86	42	44	29	12	2
Erewash	23	21	2	1	1	0
Amber Valley	147	49	98	84	13	1
North East Derbyshire	96	32	64	44	20	0
Chesterfield	48	19	29	26	1	2
Bolsover	21	12	9	5	4	0
Derby (U)	75	55	20	13	1	6
Cumbria	**5,383**	**1,523**	3,860	3,528	236	96
Cornwall (U)	**6,023**	**1,550**	4,473	4,112	327	34
Devon	**6,316**	**1,702**	4,614	4,259	310	45
North Yorkshire	**3,770**	**1,647**	2,123	1,851	211	61
Lancashire	**2,997**	**2,072**	925	696	190	39

Source: Visit England 2012

This finding is reflected in the number of hotel rooms compared to other destinations.

Figure 52: Establishments by number of rooms (compared with other destinations)

County & Districts	Total Establishments (Rooms)	Serviced Accommodation: Hotels and similar establishments	Non-serviced Accommodation ("Collective Accommodation Establishments"): Total	Holiday dwellings	Tourist campsites	Other collective accommodation
Derbyshire	15,066	8,215	6,851	1,032	5,752	67
High Peak	3,478	1,485	1,993	158	1,797	38
Derbyshire Dales	5,643	1,886	3,757	730	3,016	11
South Derbyshire	497	358	139	35	100	4
Erewash	572	571	1	1	0	0
Amber Valley	729	404	325	65	253	7
North East Derbyshire	675	352	323	29	294	0
Chesterfield	831	657	174	2	172	0
Bolsover	426	301	125	5	120	0
Derby (U)	2,215	2,201	14	7	0	7
Cumbria	24,921	12,703	12,218	3,697	7,306	1,215
Cornwall (U)	59,695	15,698	43,997	13,576	29,624	797
Devon	62,281	25,351	36,930	5,370	29,006	2,554
North Yorkshire	39,385	19,301	20,084	4,788	14,081	1,215
Lancashire	43,973	35,996	7,977	1,350	5,788	839

Source: Visit England 2012

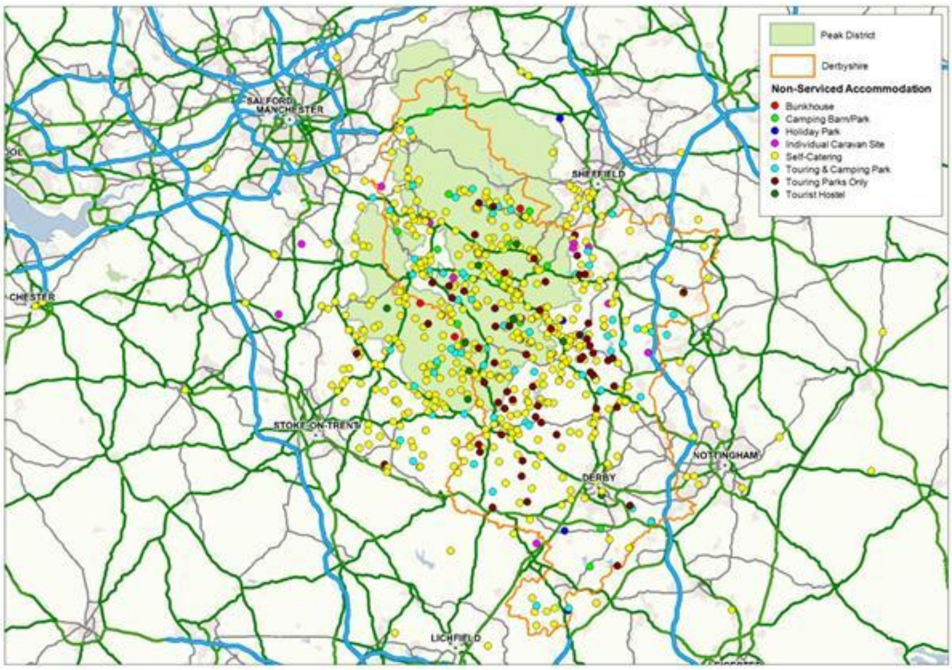
The number of hotel bedspaces is also low compared to other areas. Derbyshire also has lower number of non-serviced rooms and bedspaces compared to other areas but the difference is not as marked within the non-serviced sector compared with the serviced sector.

Figure 53: Establishments by number of bedspaces (compared with other destinations)

County & Districts	Total Establishments (Bedspaces)	Serviced Accommodation	Non-serviced Accommodation ("Collective Accommodation Establishments")			
		Hotels and similar establishments	Total	Holiday dwellings	Tourist campsites	Other collective accommodation
Derbyshire	38,959	16,877	22,082	8,009	12,219	1,854
High Peak	9,393	3,068	6,325	2,162	3,217	946
Derbyshire Dales	15,680	3,983	11,697	4,480	6,829	388
South Derbyshire	1,510	715	795	317	375	103
Erewash	1,153	1,149	4	4	0	
Amber Valley	1,970	900	1,070	476	577	17
North East Derbyshire	1,675	718	957	177	780	0
Chesterfield	1,711	1,281	430	188	172	70
Bolsover	961	676	285	31	254	0
Derby (U)	4,906	4,387	519	174	15	330
Cumbria	80,571	26,880	53,691	25,445	23,385	4,861
Cornwall (U)	270,120	33,722	236,398	88,732	146,028	1,638
Devon	200,837	54,277	146,560	38,803	99,210	7,809
North Yorkshire	125,383	41,435	83,948	18,753	61,985	2,737
Lancashire	116,300	85,204	31,096	12,005	15,218	3,873

The non-serviced accommodation offer is dominated by self-catering properties, particularly within the Peak District National Park. The county is also well served by touring caravan parks and camping sites which are also mainly located with the National Park. It is also worth noting the handful of large holiday parks on the Eastern edge of the Peak District many of which are classed as 5*.

Figure 54: Non-Serviced Accommodation



Source: Colliers International/Visit Peak District & Derbyshire

The north of the Peak District has very little non-serviced accommodation and there is also less towards the M1.

The diversity of the non-serviced accommodation sector in Derbyshire is also something to note i.e. yurts, camping pods etc. There is also an increasing trend towards the purchase of investment properties which are then rented out as non-serviced accommodation to visitors by larger companies such as Hoeseasons and Country Cottages.

Visit England's latest figures for 2012 show a more accurate picture of the volume of visitor accommodation in Derbyshire.

Figure 55: Volume of Visitor Accommodation in Derbyshire

		Serviced Accommodation	Non-serviced Accommodation ("Collective Accommodation Establishments")			
Area	*Total Establishments*	*Hotels and similar establishments*	*Total*	*Holiday dwellings*	*Tourist campsites*	*Other collective accommodation*
Derbyshire	**2077**	**680**	**1397**	**1169**	**181**	**47**
High Peak	514	151	363	303	43	17
Derbyshire Dales	1067	299	768	663	86	19
South Derbyshire	86	42	44	29	12	2
Erewash	23	21	2	1	1	0
Amber Valley	147	49	98	84	13	1
North East Derbyshire	96	32	64	44	20	0
Chesterfield	48	19	29	26	1	2
Bolsover	21	12	9	5	4	0
Derby (U)	75	55	20	13	1	6

Source: Visit England 2012

The data shows that the Derbyshire Dales has the largest volume of visitor accommodation overall and the largest volumes in each category of accommodation. High Peak is also well served but has a far lower proportion of serviced accommodation in relation to non-serviced accommodation. Most areas of Derbyshire lack any great volume of serviced accommodation.

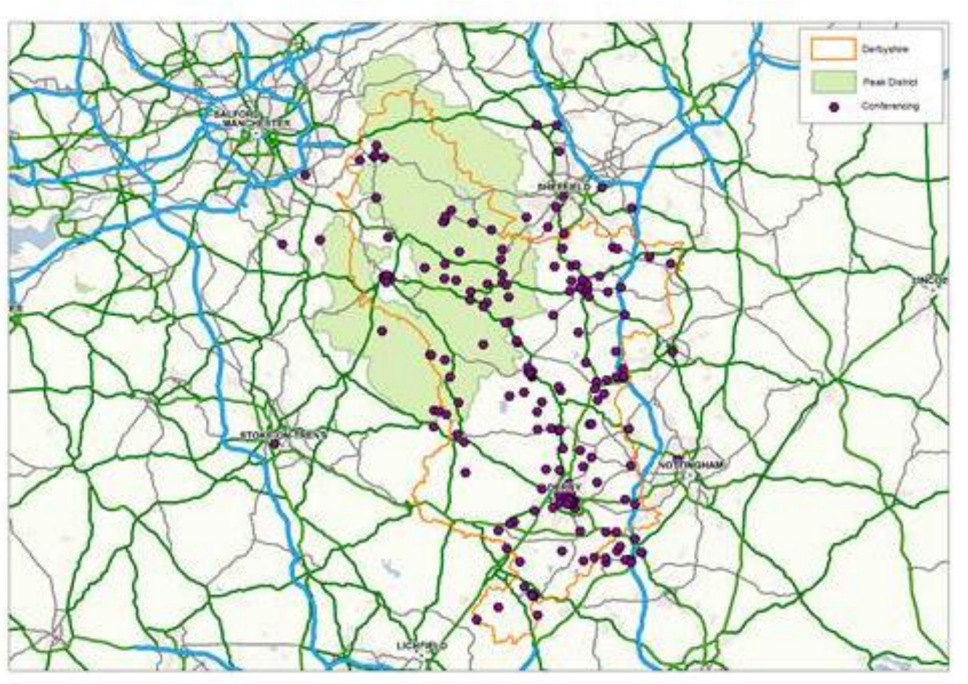
4.5 CONFERENCES & EXHIBITIONS

There are a large number of conference venues in and around Derby which is not unexpected given the number of large hotels in the city and the high proportion of international companies who are based in the area such as Rolls Royce, Bombardier etc.

There are other small clusters which exist primarily in Chesterfield, Matlock and Buxton and near the Alfreton junction off the M1.

There are some smaller venues in the Peak District itself towards the Eastern side in particular. Conference venues tend to be located close to the main road within the park and this is probably why the far north and south of the Peak District has limited provision.

Figure 56: Conference Venues



Source: Colliers International

Notably, Nottingham has a very good conferencing offer and it may be difficult to compete with those cities such as Nottingham which are very close by.

4.6 DESTINATIONS & HUBS

The study area covers a number of large urban destinations as well as smaller towns and village which act as visitor hubs.

Derby is the only city within the study area and is both a destination in its own right (see section 3.2.1) as well as a 'gateway destination' to the Peak District.

The Visit Peak District website identifies 30 towns and villages as offering facilities, services or features of interest to visitors.

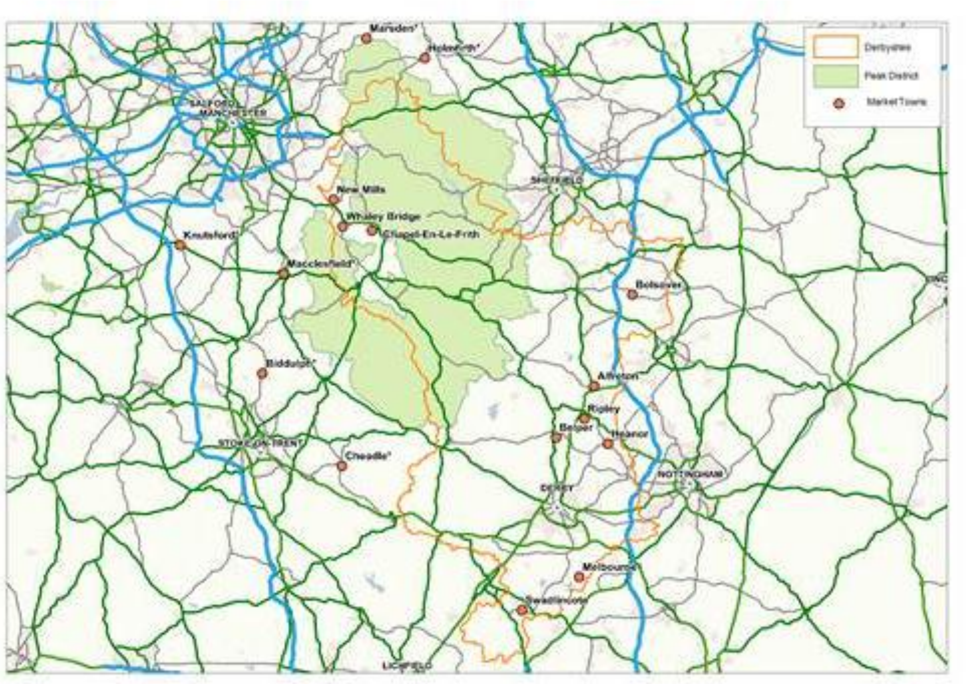
Figure 57: Towns Listed on Visit Peak District.com

	Places mentioned on Visit Peak District's website	*Points of Interest*
1	Ashbourne	Tissington Trail, Pennine Cycleway, High Peak Trail
2	Bakewell	Monsall Trail, Old House Museum, Chatsworth House
3	Castleton	Peveril Castle, Castleton Museum, Blue John (and other) Caverns
4	Chesterfield	Crooked Spire, Chesterfield Museum and Art Gallery, Hardwick Hall, Chestefield Market, Bolsover Castle, Theatres, Trans pennine trail, Canal.
5	Glossop	Manor Park, Longdendale Valley, High Street
6	Winster	Winster Market House
7	Buxton	Opera House, Pavillion Gardens, Devonshire Dome, Buxton Museum & Art Gallery, St Ann's Well, Buxton Festival
8	Eyam	Eyam Museum, Eyam Hall
9	Edale	Kinder Scout, Pennine Way
10	Hartington	Hartington Hall, Tissington Trail & High Peak Trail meeting at Parsley Hay, Manifold Way
11	Melbourne	Melbourne Hall, Melbourne Parish Church, Melbourne Festival
12	New Mills	The Torrs, New Mills Heritage Centre
13	Macclesfield	Gritstone Trail, Macclesfield Forrest, Silk Museum
14	Knutsford	Tatton Park, Knutsford Heritage Centre, Peover Hall and Gardens
15	Congleton	Congleton Museum, Clonter Opera Theatre, Little Moreton Hall
16	Matlock	Peak Rail, River Derwent, Hydro, Gulliver's Kingdom
17	Leek	Alton Towers, Rudyard Lake, Blackbrook Zoological Park
18	Hathersage	David Mellor Round Building, Design Centre, Needle Making Centre
19	Whaley Bridge	Cromford and High Peak Railway, Peak Forest Canal
20	Tideswell	St John the Baptist Church, Tideswell School of Food
21	Wirksworth	The Church of St Mary, Heritage Centre, Steeple Grange Light Railway
22	Hope	Beer Festival, Roman Fort of Navio
23	Hayfield	Sett Valley Trail, Country Show, Shhepdog Trials
24	Cheadle	Alton Towers, Church of St Giles, Indoor Market, Churnet Valley
25	Swadlincote	National Forest, Sharpe's Pottery Museum, Ski Centre, Eureka Park
26	Belper	River Gardens, Amber Valley, North Mill
27	Crich	Crich Tramway Village, Crich Stand
28	Holmfirth	Last of the Summer Wine sites, Cragrats Theatre and Café Bar
29	Bollington	Bollington Festival, Mills
30	Marsden	Standedge Tunnel, Marsden Moor Estate, Pule Hill, Marsden Jazz Festival

Source: Visit Peak District.com

In their printed literature Visit Peak District and Derbyshire also highlight a number of ‘market towns’ of importance.

Figure 58: Market Towns



Source: Colliers International

It is useful to note how these destinations or hubs are perceived by visitors to the area. Unfortunately, since there is no consistent research carried out, the evaluation can only be based on qualitative data from the sort of independent guidebooks that are used by visitors. The following therefore is a summary of comments from the Rough Guide to England.

Figure 59: Places highlighted in The Rough Guide to England

	Places highlighted in the Rough Guide to England as particularly attractive places to visit	*Recommended points of interest*	Comments
1	Derby	Derby Museum & Art Gallery	For years, Derby city centre was really rather dull, but recent attempts to spruce things up have proved very successful and there's one prime attraction in the city centre too, Derby Museum and Art Gallery
2	Ashbourne	Market place, St Oswald's Church, Cockayne Chapel	Ashbourne is an amiable little town, whose stubby, cobbled market place is flanked by a happy ensemble of old red brick buildings
3	Hartington	Biggin Dale cheese shop,	One of the prettiest villages in the Peaks, its easy ramble of stone houses zeroing in on a tiny duck pond
4	Buxton	Buxton Festival, Buxton Festival Fringe, Gilbert & Sullivan Festival, Buxton Opera House, Buxton Museum & Art Gallery, Poole's Cavern	Buxton may have had its doldrums, but now it's on the way up, its centre revamped and reconfigured with care and flair
5	Castleton	Peveril Castle, Peak Cavern, Speedwell Cavern, The Treak Cliff, John Blue Cavern	The agreeable little village of Castleton lies on the northern edge of the White Peak, its huddle of old stone cottages ringed by hills and set beside a babbling brook.
6	Edale	Pennine Way, Kinder Scout, National Park Moorland Centre	There's almost nothing to Edale village except for a slender, half mile trail of stone houses, which march up the main street from the train station with a couple of pubs, an old stone church and a scattering of B&Bs on the way - and it's this somnambulant air that is its immediate appeal.
7	Hathersage	Churches, needle making centre, design museum, country shop	Castleton, has a hard time persuading people not to shoot straight past on their way to the heart of the peaks. This little town is, however, worth at leats an hour of anyone's time.
8	Eyam	Mompessons's Well, Church of St Lawrence, Eyam Hall, Eyam Museum	Long, thin and hilly, Eyam is little more than one main street
9	Baslow	St Anne's Church	Baslow is an unassuming little village, whole oldest stone cottages strong prettily along the river Derwent
10	Chatsworth	Chatsworth House	One of the finest stately homes in Britain, fantastically popular Chatsworth House was built in the seventeenth century by the first Duke of Devonshire.
11	Bakewell	Bath Gardens, All Saints Church, Saxon Cross	Famous pudding and tart apart, Bakewell is an undemanding place today, is main streets too crowded by traffic -and tourists - to be much fun
12	Hassop and Ashford in the Water	No attractions mentioned	Hidden away in the heart of the Peaks, the tiny hamlet of Hassop has a rugged solitary feeling. Miniscule Ashford in the Water is one of the prettiest and wealthiest villages in the peaks.

Source: The Rough Guide to England

Although there is no independent research which shows how visitors to the Peak District use the surrounding towns and cities, feedback from stakeholders has suggested that the following places are acting as gateway destinations:

Derby	Penistone
Sheffield	Rowsley
Manchester	Saddleworth
Nottingham	Stocksbridge
Barnsley	Stoke-On-Trent

In addition, there are a number of other places which consultees have suggested are fulfilling the role of visitor hubs. In some cases these destinations are also attractions in their own right:

Chatsworth Park	Longdendale
Dovedale	Longshaw
Dovestone	Lyme Park
Eastern Moors	Mappleton Lane
Fairholmes	Millers Dale
Goyt Valley	Monsal Head
Langsett Barn	North Lees Estate
Derwent Valley Mills	Parsley Hay
Tittesworth Reservoir	The Roaches
Warslow Estate	Surprise View
Waterhouses	Tissington

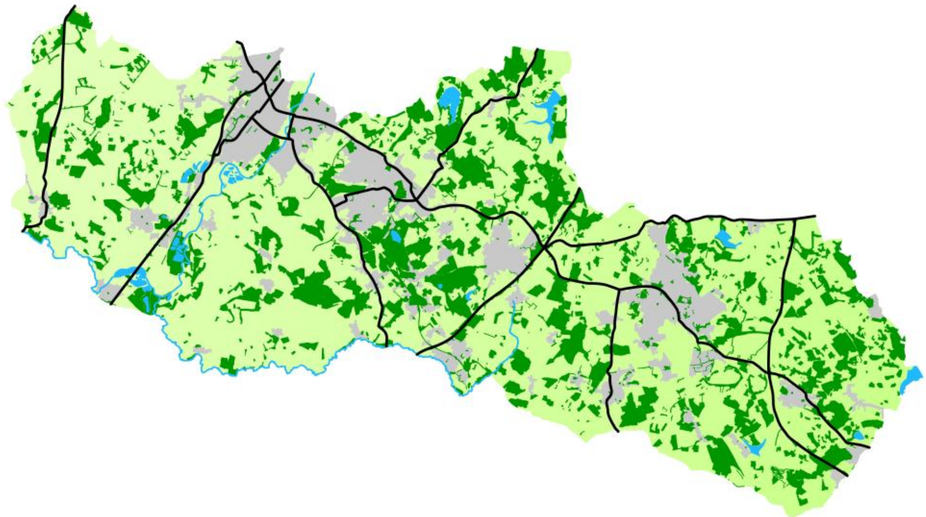
4.6.1 THE NATIONAL FOREST

The area designated as the National Forest covers 200 square miles of the Midlands and includes parts of Derbyshire, Staffordshire and Leicestershire. The main towns within the National Forest include Burton Upon Trent and Swadlincote and Ashby De La Zouch.

The National Forest effectively came into existence in 1990 when the area was chosen from a number of nominations from around the UK. Woodland cover has increased from around 6% in 1991 to 19.5% in 2013.

More than 200,000 people live in the Forest.

Figure 60: Map of The National Forest



Source: The National Forest Company

The National Forest is a diverse area which includes a mix of residential, industrial, commercial and leisure uses.

The leisure uses are already fairly substantial and are increasing in significance. Recreation facilities include woodland paths for walking and cycling and lakes for fishing and other water based activities. Visitor accommodation is varied and includes log cabins, B&Bs, self catering accommodation, hotels and guest houses. Other visitor facilities include visitor centres such as the Rosliston Forestry Centre, attractions such as Conkers, cafes, restaurants and bars and a programme of festivals and events.

Although the National Forest takes in part of Derbyshire and touches the southern edge of the Peak District, it is developing as a distinct visitor destination with a different identity from the National Park. As such it is recommended that it should be viewed outwith the core recommendations of this study which focuses on the Peak District area.

4.7 ENTERTAINMENT AND THE ARTS

There are very clear clusters of venues for entertainment and the arts in Derbyshire.

There are quite a number of theatres, arts centres and cinemas in both Derby and Chesterfield. Buxton Opera House is perhaps the only theatre of any real significance within the Peak District National Park although there are a handful of 'little' theatres/community run theatres.

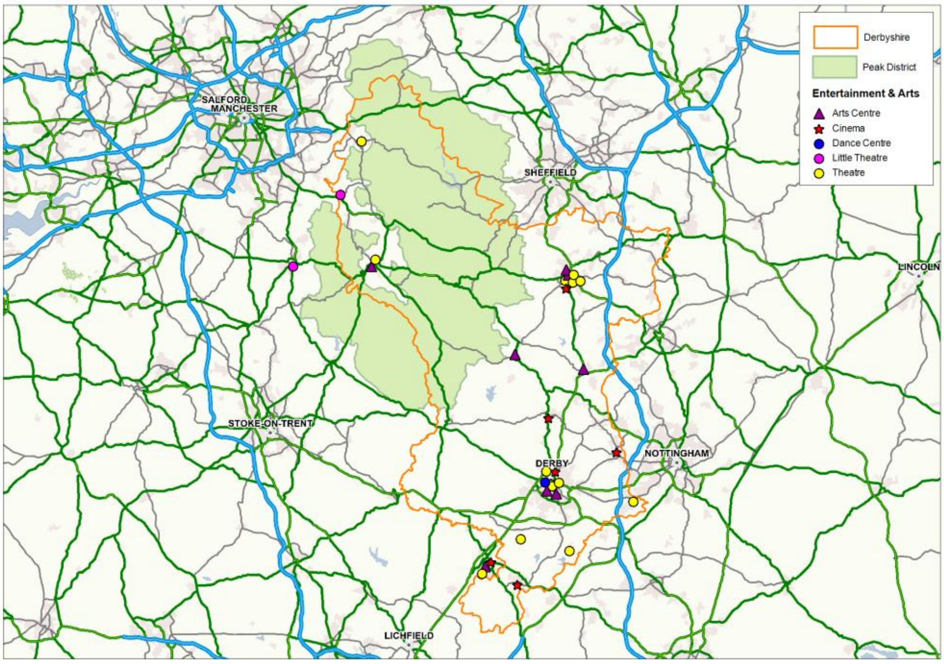
Figure 61: Entertainment & Arts Venues

	Name of Venue	*Location*	*Type*
1	QUAD	Derby	Arts Centre
2	Chesterfield Studios	Chesterfield	Arts Centre
3	Genesis Social Enterprise	Alfreton	Arts Centre
4	The Brewhouse Arts Centre	Burton	Arts Centre
5	The Voicebox	Derby	Arts Centre
6	Enabled Art	Derby	Arts Centre
7	The Grand Pavillion	Matlock	Arts Centre
8	Pavillion Gardens	Buxton	Arts Centre
9	Showcase Cinema	Westfields, Derby	Cinema
10	Odeon Cinema	Derby	Cinema
11	Ritz Cinema	Belper	Cinema
12	Cineworld	Chesterfield	Cinema
13	Cineworld	Burton	Cinema
14	Scala Cinema	Ilkeston	Cinema
15	Odeon Cinema	Swadlincote	Cinema
16	Deda	Derby	Dance Centre
17	New Mills Art Theatre	New Mills	Little Theatre
18	MADS Theatre	Macclesfield	Little Theatre
19	Assembly Rooms	Derby	Theatre
20	Guildhall Theatre	Derby	Theatre
21	Derby Theatre	Derby	Theatre
22	Pomegranate Theatre	Chesterfield	Theatre
23	Partington Theatre	Glossop	Theatre
24	Derby Live	Derby	Theatre
25	Buxton Opera House	Buxton	Theatre
26	The Hasland Theatre Company	Chesterfield	Theatre
27	The Winding Wheel	Chesterfield	Theatre
28	Robert Ludlam Theatre	Derby	Theatre
29	The Duchess Theatre	Long Eaton	Theatre
30	The Glade Theatre	Rosliston Forestry Centre	Theatre
31	Melbourne Assembly Rooms	Melbourne	Theatre
32	400 Hall Repton School	Repton	Theatre

Source: Colliers International

Buxton is known as a centre for the arts and the Opera House, Pavilion Gardens arts centre and the Buxton Festival have all helped to reinforce it as a place providing entertainment and access to the arts. We know from the consultation that there are a large number of creative businesses as well as a strong entrepreneurial spirit in many areas of the Peak District, particularly around Buxton.

Figure 62: Entertainment and the arts



Source: Colliers International

4.8 FESTIVALS & EVENTS

There are over 60 cultural events which take place in Derbyshire, plus a number of sporting events and monthly farmers markets in various locations across the county.

The Peak District has a number of well-established sporting events with new opportunities being developed such as the L'eroica vintage cycling festival and the Tour De France 2014 which is set to pass through Holmfirth and into the northern edge of the Peak District in to Sheffield.

Figure 63: Main sporting events

	Name of Event	*Location*	*Dates*
1	Peak District Walking Festival	Various	Apr-May
2	Chesterfield Area Walking Festival	Various	May
3	National Forest Walking Festival	Peak District National Park	May
4	Peak District Cycling Festival	Various	Sep
5	Autumn Footprints - The Amber Valley and Erewash Walking Festival	Various	Sep
6	The South Pennine Walk and Ride Festival	South Pennines	Sep
7	National Forest 10K and Fun Run	National Forest	Sep
8	Burton Regatta	Burton Upon Trent	Jul
9	Erewah 5K	Long Eaton, Erewash	May
10	Erewash Triathlon	Long Eaton, Erewash	Aug
11	Derby 10k	Derby	April
12	Asian Annual Games	Osmaston Park, Derby	May

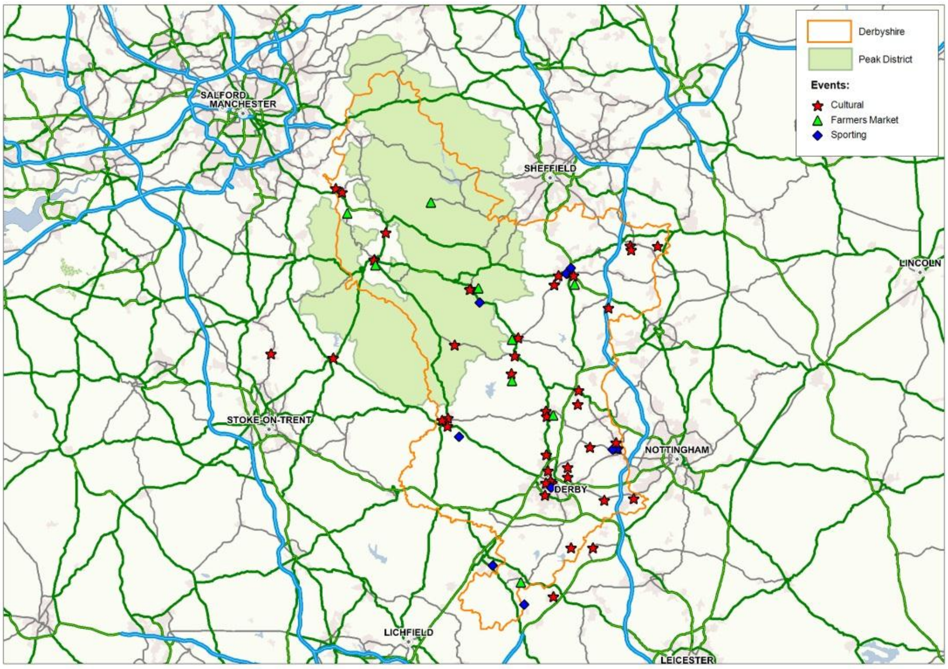
Source: Visit Peak District & Derbyshire

At present the majority of events focus on culture and the arts. Many of South Derbyshire's country houses are used as venues for major events i.e. Elvaston

Castle, Catton Hall and Calke Abbey as well as places in wider Derbyshire such as Chatsworth. In the future there is likely to be growth in sporting events, particularly after of the aquatics centre and the velodrome in Derby. The 2014 Tour de France is also passing through the area.

Festivals and events tend to be concentrated around particular towns and Derby in particular has a very strong cultural programme. The main issue for both Derby City and wider Derbyshire is that there is a lack of a framework for promoting and delivering these events. The large festivals such as Feste and Format for example are managed differently from many of the smaller community festivals and events. The impact of more consolidated approach to all festivals and events in the region could induce knock on benefits for the smaller festivals and could enhance fringe type events in surrounding areas.

Figure 64: Festivals and Events



Source: Colliers International

Aside from Derby, Chesterfield, Ashbourne and Matlock are particular hubs for festivals and events.

Places like Erewash also have a range of smaller events which in areas with no major visitor attractions can be a draw to pull in visitors.

However, the Buxton Festival and fringe is probably the most well-known festival in the area and has national and international profile.

Figure 65: Main Cultural Events

	Name of Event	*Location*	*Dates*
1	Four Four Time	Buxton Opera House, Buxton	Feb
2	Pomegranate New Playwriting Festival	Pomegranate Theatre, Chesterfield	Mar
3	Elemental Force	DerbyLive, Derby	Mar
4	Planet Circus	DerbyLive, Derby	Mar
5	Belper Passion	Methodist Church, Belper	Mar
6	Format Festival	QUAD, Derby	Mar
7	Leeks Arts Festival	Various, Leek	May
8	Chesterfield Community Arts Festival	Various, Chesterfield	May
9	Belper Arts Festival	Various, Belper	May
10	Draycott Festival of Arts and Gardens	Draycott	May
11	ID Fest	Derby Quad, Derby	May
12	Ashby Arts Festival*	Ashby-de-la-Zouch	May
13	Bakewell Arts Festival	Bakewell	Jun
14	Holymoorside & Walton Arts Festival	Holymoorside, Chesterfield	Jun
15	Bakewell International Day of Dance	Bakewell	Jun
16	Limestone Journeys Festival	Creswell Crags	Jun
17	Bolsover District Festival	Bolsover	Jun
18	Ashbourne Festival	Ashbourne	Jun
19	Asbourne Arts Festival	Ashbourne	Jun
20	Fringe Festival	Ashbourne	Jun
21	Long Eaton Carnival	Long Eaton	Jun
22	Ilkeston Carnival	Ilkeston, Erewash	Jun
23	Acoustic Festival	Derby	Jun
25	Derbyshire Pride	Derby	Jun
25	The Big 1	Chaddesden Park	Jun
26	The Allestree Weekend	Allestree Park, Derby	Jun
27	Buxton Fringe Festival	Various, Buxton	Jul
28	Buxton Festival	Various, Buxton	Jul
29	New Mills One World Festival	High Lea Park, New Mills	Jul
30	Ripley Music Festival	Ripley	Jul
31	Stainsby Festival	Stainsby, Chesterfield	Jul
32	Indietracks Festival	The Midland Railway Centre, Ripley	Jul
33	Biddulph Festival	Biddulph	Jul
34	Bakewell Carnival Week	Bakewell	Jul
35	Doves Holes International Beer & Jazz Festival	Doveholes	Jul
36	International Gilbert and Sullivan Festival	Various, Buxton	Jul
37	Summer Sounds	Ilkeston, Erewash	Jul
38	Oakwood Gala	Oakwood Park, Derby	Jul
39	Edge-Lit	QUAD, Derby	Jul
40	DEparture Lounge	Derby Theatre	Jul
41	Caribbean Carnival and Parade	Market Place, Derby	Jul
42	South Asian Arts Festival	Normanton Park, Derby	Jul
43	Fantastiq	QUAD, Derby	Aug
44	Y Not Festival	Pikehall, Nr Matlock	Aug
45	Matlock Bath Illuminations	Matlock Bath	Aug
46	Darley Park Concert	Darley Park, Derby	Sep
47	New Mills Community Festival	New Mills	Sep
48	Derby Feste	Derby	Sep
49	Wirksworth Festival	Wirksworth	Sep
50	The Melbourne Festival Concerts and Performace Programme	Melbourne	Sep
51	Erewash Festival of Light	Erewash	Oct
52	Derby Folk Festival	Assembly Rooms, Derby	Oct
54	Bolsover Festival of Brass	Heritage High School, Clowne	Oct
55	Chatsworth Road Festival	Brampton, Chesterfield	Oct
56	Ilkeston Charter Fair	Ilkeston, Erewash	Oct
57	Derwent Poetry Festival	Masson Mills, Matlock Bath	Nov
58	Buxton Adventure Festival	Pavilion Arts Centre, Buxton Opera House	Nov
59	Off the Tracks Festival	Castle Donington	May & Aug-Sep
60	Summer Nights	Derby	Summer

Source: Visit Peak District & Derbyshire

There are also some well-established farmers markets in Derbyshire, the most well-known of which are shown in Figure 66. The local markets are particularly well regarded, in part due to the high quality local produce available.

Figure 66: Farmers Markets in Derbyshire

	Location of Market	*Times*
1	Bakewell	Last Saturday every month
2	Belper	Second Saturday every month
3	Buxton	First Thursday of the month
4	Castleton	First Sunday of the month
5	Chesterfield	Second Thursday of the month
6	Matlock	Third Saturday of the month
7	Swadlincote	Third Saturday of the month
8	Whaley Bridge	Second Saturday every month
9	Wirksworth	First Saturday of the month

The well dressing events which are strongly associated with the Peak District and (said to originate in Tissington) are held in the summer months all over Derbyshire. Traditionally, these festivals involve decorating wells, springs or other water sources with designs created from flower petals. The well dressings offer a type of event which is unique to Derbyshire.

Overall, The Visit England brand and satisfaction tracker research 2011-12 shows that the availability of festivals, music, sporting and cultural events is seen as a low level weakness of the Peak District. However, this finding may have more to do with a lack of visitor awareness of what is on offer rather than a lack of product in this area.

4.9 NIGHTLIFE

Unsurprisingly, the nightlife offer is strongest in the big cities and towns in the area.

Derby has a large number of bars and pubs as well as an excellent reputation for real ale. Sadler Gate has a particular reputation for its bars as well as good quality independent eateries. The city also has a number of clubs, of which Zanzibars is the largest and there are several live music venues featuring different genres of music. The Lonely Planet guide also mentions Ye Olde Dolphin, Brunswick Inn, The Brewery Tap and Old Silk Mill as places to sample real ale and live music.

There is little nightlife in the smaller towns with the Peak District and it is mainly pubs and inns which are mentioned in the Lonely Planet and Rough Guides.

Buxton supports a small hub for night life which according to the Lonely Planet ‘centres on the pubs and restaurants around market place and along the High street’. Barbarella’s is noted as a ‘sleek retro wine bar’ whilst Project X is mentioned for its live music.

Chesterfield also has a busy nightlife based around restaurants, bars and its theatres.

4.10 ACTIVITIES & SPORTS

Cycling and walking are popular outdoor activities in the region, particularly in and around the Peak District.

The National Park is one of the pilot areas in Department of Transport's Cycling Towns and Cities scheme and the Authority has developed extensive plans to improve the infrastructure for both road and mountain biking.

At present, the Park offers over 65 miles of trails, most of which are suitable for cycling, walking and horse riding. Three long distance routes pass through the Park; The Transpennine Trail, the Pennine Cycleway and the Pennine Bridleway. There are also currently six shorter traffic free trails including the recently reopened 8.5m section of the Monsal Trail and Tunnels, running from Bakewell to Buxton.

Figure 67: Main Trails

Route	*Distance (m)*
National Long Distance Trails	
Transpennine Trail	207 (total)
Pennine Cycleway	355 (total)
Pennine Bridleway	130 (total
Peak District Traffic Free Routes	
High peak trail	17
Tissington trail	13
Manifold Tracks & Dove Valley	9
Route 54A	10
Monsal Trail	8.5
Upper Derwent Valley	12

Source: Colliers International

A number of on road touring routes of differing lengths and levels of difficulty are also signed and promoted within the Park, aimed at more experienced road bikers.

There are a number of cycle hire centres and cycle hubs within the Park including three operated directly by the Park Authority at Ashbourne, Parsley Hay and Fairholmes at Derwent Reservoir. The recently extended Hassop Cycle Hire Centre is operated by a private sector partner and offers bike hire, electric bike hire, bike maintenance, a café, gift shop and play area. Places like Parsley Hay, Miller's Dale and Middleton Top are also located along trails and are potentially significant for development.

The Park Authority's future plans include an ambition to create a 26km traffic free route from Matlock Station to Bakewell which would join up with the existing Monsal Trail to Buxton. The plans also recognise a need to improve the network of bridleways for mountain bikers and to introduce more circular routes and routes linked to the urban areas.

The Thornhill trail is another National Park Authority owned trail in the Hope Valley which has potential to connect the Hope Valley with the Upper Derwent Reservoirs and Fairholmes should the required funding be available.

Beyond the National Park, Derbyshire County Council promotes a number of cycleways which run along old railway lines, waterways and green corridors.

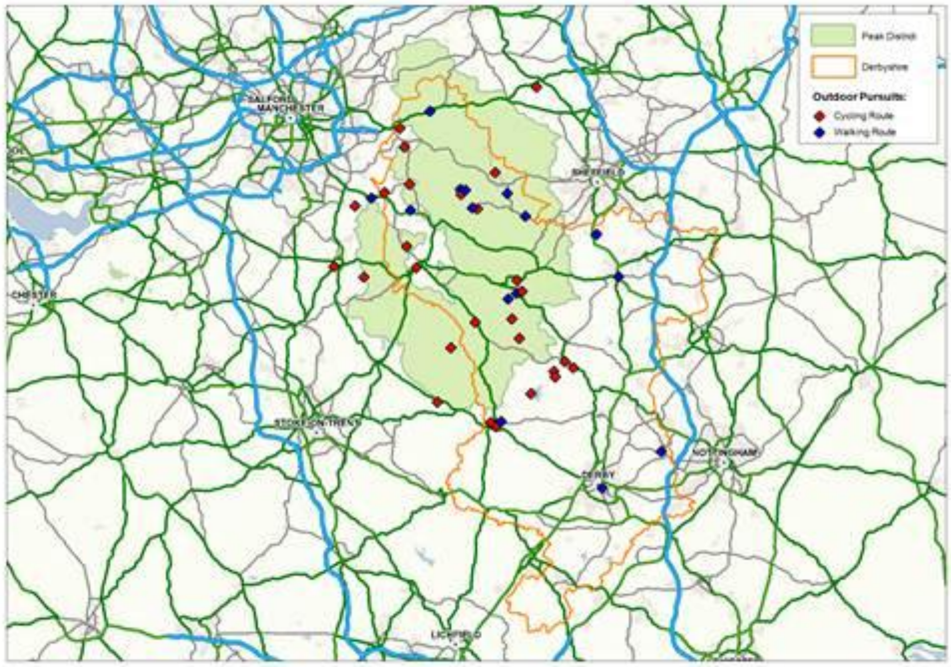
Chesterfield also has an integrated network of trails which run through the town and are linked to the Transpennine trail through the Southern Spur which runs along the Cuckoo Way (the Chesterfield Canal towpath).

Derby is a Sustrans National Cycle Network Hub and Cycle Derby has produced four route maps for cyclists to explore the city. In addition they have identified 5 short and 3 longer distance routes which can be followed on and off road to take in areas of interest.

The National Forest promotes cycling on quiet roads and purpose built trails including the Conkers Circuit and the Ashby Woulds Heritage Trail. The Hicks Lodge National forest Cycling Centre offers a range of off road trails for cyclists with different levels of skill. The National Forest long distance trail (75 miles) is also due to launch in 2014.

Figure 68 shows the most popular starting off points for the major cycling trails and long distance walking routes in the county.

Figure 68: Cycling and Walking Trails



Source: Colliers International

The Peak District National Park is recognised equally as an important area for walking, providing 202m[2] of open access land and 1,867m of rights of way. Long distance routes include the Pennine Way National Trail and the Trans Pennine Trail which is part of the 2,500m E8 European walking route. Many of the cycling routes identified above are promoted as accessible routes for walkers of different abilities and the Park offers regular Ranger led guided walks throughout the year.

Other sports for which the area is particularly noted include:

- Horse riding – all 65m of trails above can be used by horse riders and there is an extensive network of bridleways for more challenging rides including the long distance Pennine Bridleway. There are facilities for horse box parking and tethering on the Tissington Trail and Longdendale Trail.
- Caving – the Titan Cave at Castleton is the UK's highest natural cavern. Caving days are offered from a number of activity centres around the area.
- Rock climbing – the climbing is considered to be so good in the area that many recreational climbers chose to live and work around the Peak District. Stanage Edge near Sheffield and the Roaches in the Staffordshire Moorlands are nationally recognised for climbing.
- Airsports – Mam Tor near Castleton is also recognised nationally for hang gliding and paragliding and Derbyshire and Lancashire Gliding Club near Hathersage offers a range of airsports around the Peak District.

- Fishing – river fishing in the Wye, Derwent and Dove Rivers is recognised as some of the best in the UK. Coarse fishing is offered on Rudyard, Ladybower and Carsington Reservoirs.
- Motor Sports – the National Forest has a particular reputation for motor sports at the Donnington Park Racing Circuit. Tank driving is offered at Measham near Swadlincote.

4.11 RETAIL

Using CoStar Focus data we have identified that there are 2,709 units occupied by 2+ employees in Derbyshire. The location of these units is show in the following table;

Figure 69: Retail Units by Town

	Town	*Number of Retail Units (2+ employees)*
1	Derby	892
2	Chesterfield	489
3	Alfreton	175
4	Swadlincote	127
5	Buxton	125
6	Matlock	131
7	Ilkeston	133
8	Belper	93
9	Ashbourne	96
10	Glossop	92
11	High Peak	74
12	Ripley	75
13	Bakewell	67
14	Dronfield	57
15	Hope Valley	31
16	Heanor	52
	TOTAL	2,709

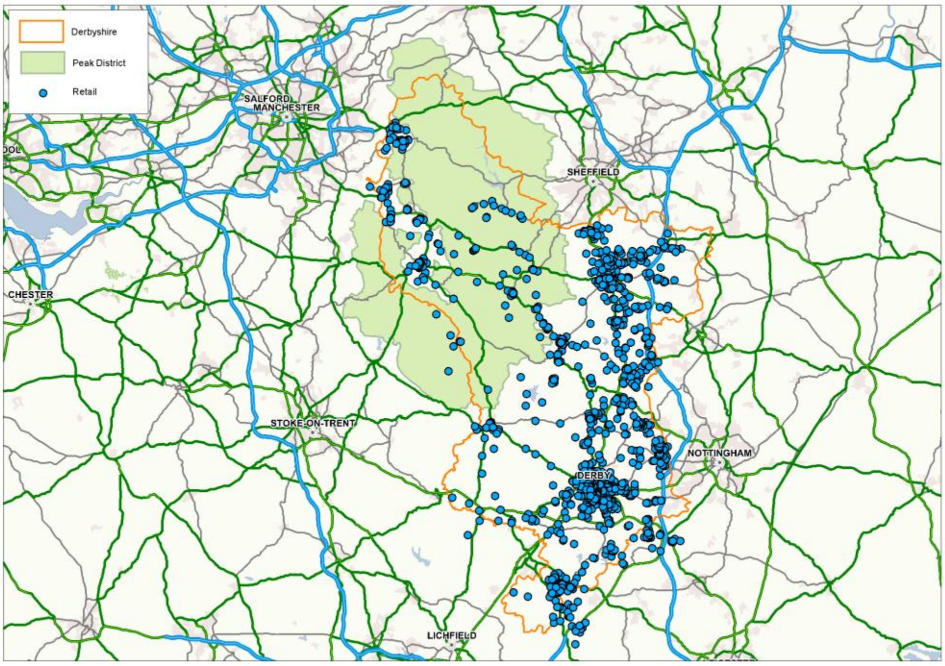
Source: CoStar Focus

There are a further 514 single employee retail units listed in the county.

As might be expected, the independent retail offer much like the overall retail offer is concentrated in key towns and cities like Derby where the Cathedral Quarter offers a point of contrast to more mainstream retail at Westfields.

Chesterfield also has a very good overall retail and independent retail offer in the Market Place and along Chatsworth Road which is one of the main routes into the Peak District. Chesterfield's historic Market Hall is undergoing a £4 million redevelopment. Opening in October 2013, the market hall will provide 45 internal and external retail units, 22 offices, a central café/coffee shop and conference facilities. This will further enhance the independent shopping offer in the town.

Figure 70: Retail



Source: Colliers International

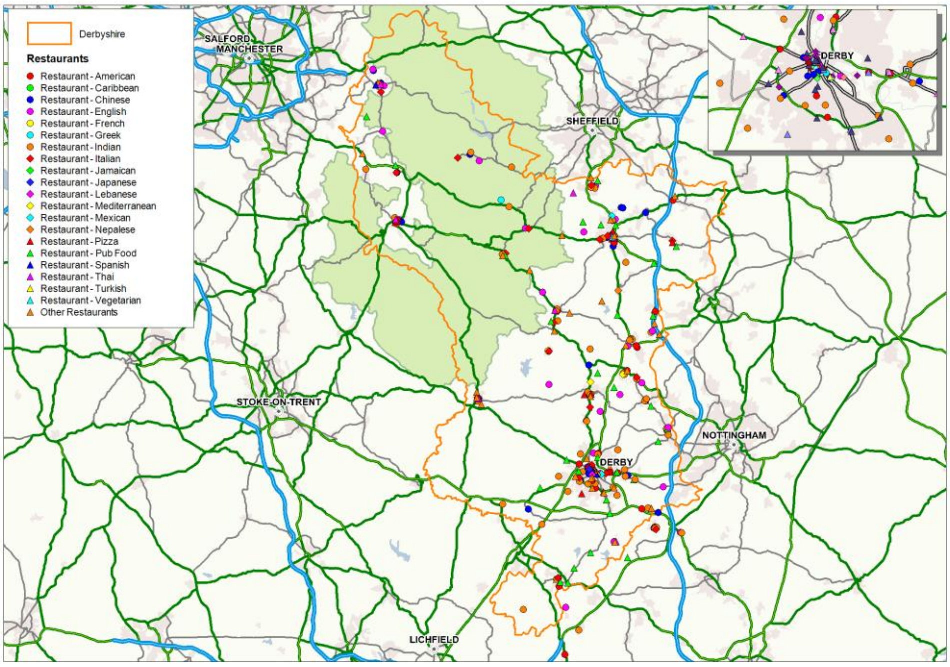
The strength of many of the smaller tourist hubs in Derbyshire lies in its independent retail offer however, it is recognised that the quality and lack of focus on good customer services can be variable in these places. Buxton in particular is a place that has had a high number of recent retail closures.

However, there are a number of ideas being put forward to address this variation in quality, notably the establishment of a retail academy by The University of Derby in Buxton.

4.12 FOOD & DRINK

The largest cluster of restaurants is in and around Derby where there are a particularly high number of Indian restaurants. There are smaller clusters of restaurants in many of the main towns.

Figure 71: Restaurants Derbyshire



In order to get a clearer picture of where the good quality restaurants and pubs are and to identify and destination food shops we have used the Good Food Guide 2013 and the Good Pub Guide 2013. Figure 78 shows all of the restaurants listed in the Good Food Guide.

Derby has a number of good restaurants, as does the area around Bakewell including The Devonshire Arms, Fischer's at Baslow Hall and Rowleys.

Figure 72: Restaurants listed in the Good Food Guide

	Name of Restaurant	*Location*	*Cuisine*	*Average £*	*Quotes - Good Food Guide*
1	The Dining Room	Ashbourne	Modern European	40	finely honed seasonal food
2	Fischer's Baslow Hall	Baslow	Modern European	72	a seducative package indeed
3	Rowley's	Baslow	Modern British	28	lively village brasserie
4	The Devonshire Arms	Beeley	Modern British	28	well-to-do country inn
5	The Lighthouse Restaurant	Boylestone	Modern British	-	the food is delicious , with beautiful flavours and delightful presentation
6	The Samuel Fox Inn	Bradwell	Modern British	25	cockle-warming country pub
7	Non Solo Vino	Chesterfield	Italian	39	trailblazing italian wine shop-cum-resturant
8	Darleys	Darley Abbey	Modern British	35	tourist hot-spot with capable food
9	Zest	Derby	Modern British	25	capable local restaurant
10	Masa	Derby	Modern European	-	a cavernous bar and restaurant - the many tiered dining gallery reaching towards the ceiling
11	Mumbai Chilli	Derby	Indian	-	smart, contemporary Mumbai Chilli is worth a visit for good Tandoori's
12	The Old Vicarage	Ridgeway	Modern British	65	a beacon of natural -born cooking
13	Red Lion Bar & Bistro	Stone Edge	Modern British	27	souped-up pub classics

Source: The Good Food Guide 2013

There are slightly more high quality eateries listed in the AA guide, however, just 3 achieve 3 rosettes.

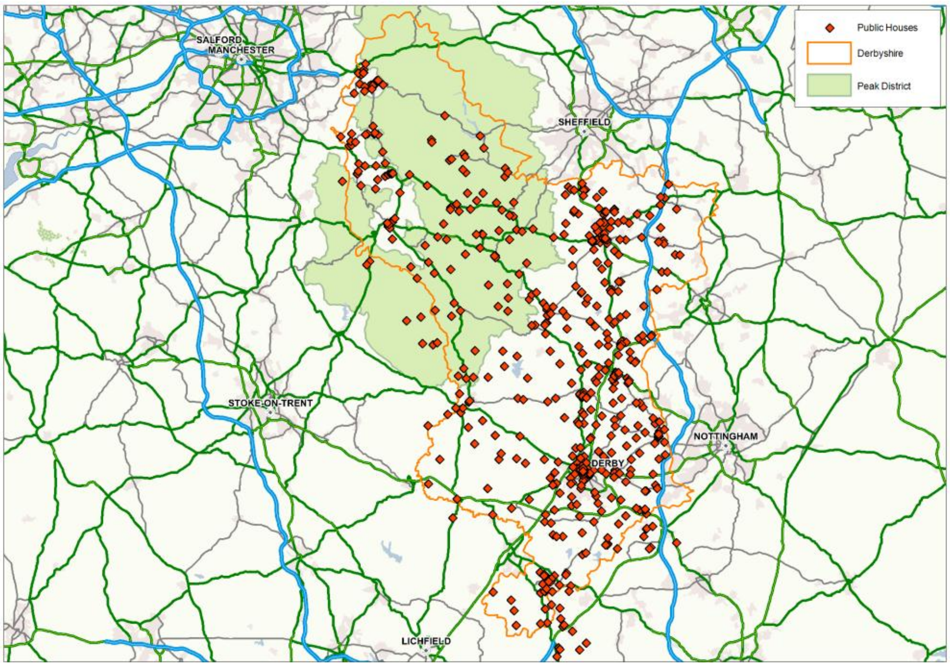
Figure 73: Restaurants listed in the AA Guide

	AA Guide Listed Restaurants in & around Derbyshire	*Location*	*Number of Rosettes*
1	Peak Edge Hotel at the Red Lion	Chesterfield	1
2	Piedaniel's	Bakewell	1
3	Santo's Higham Farm Hotel	Higham	1
4	The Chequers Inn	Froggatt Edge	1
5	Breadsall Priory Marriott Hotel Country Club	Breadsall	1
6	The Black Cow	Dalbury	1
7	The Plough Inn	Hathersage	1
8	Best Western Lee Wood Hotel	Buxton	1
9	Nonnas	Sheffield	1
10	Copthorne Hotel Sheffield	Sheffield	1
11	Risley Hall Hotel & Spa	Risley	1
12	Hotel Van Dyk	Clowne	1
13	Three Queens Hotel	Burton Upon Trent	1
14	The Mill Wheel	Hartshorne	1
15	Staindrop Lodge Hotel	Sheffield	1
16	The Royal Oak	Long Whatton	1
17	Stones Restaurant	Matlock	2
18	The Devonshire Arms at Beeley	Beeley	2
19	Cavendish Hotel	Baslow	2
20	Callow Hall Hotel	Ashbourne	2
21	The Shoulder at Hardstoft	Hardstoft	2
22	Casa Hotel	Chesterfield	2
23	The Morley Hayes Hotel	Morley	2
24	The Maynard	Grindleford	2
25	Darleys Restaurant	Darley Abbey	2
26	Masa Restaurant	Derby	2
27	George Hotel	Hathersage	2
28	The Samuel Fox Country Inn	Bradwell	2
29	Three Horseshoes Inn & Country Hotel	Leek	2
30	Rafters Restaurant	Sheffield	2
31	Losehill House Hotel & Spa	Hope	2
32	Restaurant Gilmore at Strine's Farm	Uttoxeter	2
33	The Priest House Hotel	Castle Donnington	2
34	The Bay Tree	Melbourne	2
35	Best Western Premier Yew Lodge Hotel & Spa	Kegworth	2
36	Whitley Hall Hotel	Sheffield	2
37	The Wortley Arms	Wortley	2
38	The Woodhouse	Loughborough	2
39	The Peacock at Rowsley	Bakewell	3
40	Fischer's Baslow Hall	Baslow	3
41	East Lodge Country House Hotel	Rowsley	3

Source: AA Guide

Derbyshire has a large number of pubs of variable quality.

Figure 74: Pubs in Derbyshire



Source: Colliers International

Those pubs which are listed in the Good Pub Guide are shown in Figure 75.

There are quite a lot of pubs which are listed in the guide as ‘worth a visit’; they are mainly in the Peak District and around Derby following the line of the M1. However, those pubs which were listed as ‘Good Pub Guide Recommended’ and therefore of exceptional quality were almost all within the boundaries of the Peak District National Park.

Derbyshire is particularly well-known for its artisan beers and local micro-breweries and because of this together with the special character of many of the counties pubs the reputation of pubs in the area is going from strength to strength.

Figure 75: Good Pub Guide recommended pubs

	Good Pub Guide Recommended Pubs	*Location*	*Awards*	*Quotes - Good Pub Guide*
1	Bear	Alderwasley	1*, wine award, beer award	Unspolit country inn with beamed cottagey rooms, good range of real ales and a peaceful garden
2	Old Poets Corner	Ashover	Beer award, stay award, value award	A fine range of interesting real ales and ciders in characterful village pub with enthusiastic owners, hearty, reasonably priced food
3	Devonshire Arms	Beeley	Food award, beer award, stay award, wine award	Contemporary twist to lovely old interior; local beers, good wine list, interesting carefully sourced food; attractive comfortable bedrooms
4	Olde Gate	Brassington	1*	Lovely interior, candlelit at night, country garden
5	Barrell	Bretton	-	Remote dining pub with traditional décor and friendly staff
6	Church Inn	Chelmorton	beer award, value award	Convivial traditional inn beautifully set in High Peak walking country - good value
7	Coach and Horses	Fenny Bentley	Value award	Former coaching inn with pretty country furnishings, roaring open fires and food all day
8	Crispin	Great Longstone	Value award	Spotless traditional pub with emphasis on good value pubby food; good drinks choice too
9	Eyre Arms	Hassop	-	Comfortable, neatly kept pub, with pretty views from the garden
10	Plough	Hathersage	Food award, wine award, stay award	Welcoming dining pub usefully placed for exploring the peak district, with good food, beer and wine, waterside garden and bedrooms
11	Lantern Pike	Hayfield	Value award	Friendly retreat from the surrounding moors of Kinder Scout, with reasonably priced food, bedrooms
12	Cheshire Cheese	Hope	Beer award, value award, stay award	Cosy multi level stone pub with good real ales in attractive Peak District village, bedrooms
13	John Thompson	Ingleby	Beer award, food award, stay award	Own-brew pub that strikes the right balance between attentive service, roomy comfort and good value lunchtime food
14	Barley Mow	Kirk Ireton	Beer award, stay award, value award	Character-laden welcoming old inn that focuses on real ale and conversation, bedrooms
15	Ladybower Inn	Ladybower reservior	Beer award	All-day food in comfortable proper pub nestling above reservior in good walking country, bedrooms
16	Bulls Head	Monyash	-	Unpretentious local with tasty home cooking
17	Lathkil	Over Haddon	Beer award	Traditional pub well placed for Lathkil Dale wih super views, good range of beers and decent food
18	Devonshire Arms	Pilsley	Wine award, beer award, stay award	Simple yet stylish country inn, good all round, nice place to stay
19	Flying Childers	Stanton in Peak	Beer award, value award	Top-notch beer and inexpensive simple bar lunches in warm hearted unspoilt pub - a delight
20	White Horse	Woolley Moor	Wine award	Attractive old dining pub with good food, pretty countryside

Source: The Good Pub Guide 2013

Many pubs also offer rooms/visitor accommodation in Derbyshire. This is of variable quality on the whole.

Figure 76: Inns with Rooms

	Name	Location	Classification	Bed Spaces
1	Bentley Brook Inn	Ashbourne	3 STAR INN	23
2	Peakstones Inn	Alton	3 STAR INN	20
3	Ye Olde Cheshire Cheese Inn	Castleton	3 STAR INN	20
4	The Melbourne Arms	Melbourne	3 STAR INN	15
5	Devonshire Hotels and Restaurants	Skipton	3 STAR INN	14
6	Bulls Head Inn	Alton	3 STAR INN	12
7	Red Lion	Matlock	3 STAR INN	11
8	Roebuck Inn	Chapel-en-le-Frith	3 STAR INN	11
9	Dusty Miller Inn	Barlborough	3 STAR INN	10
10	The Queen Anne Inn	Nr Tideswell	3 STAR INN	4
11	Lantern Pike Inn	Little Hayfield	3 STAR INN	10
12	The George	Youlgrave	3 STAR INN	8
13	The Charles Cotton Hotel	Hartington	4 STAR INN	36
14	Yorkshire Bridge Inn	Bamford	4 STAR INN	31
15	Devonshire Hotels and Restaurants	Skipton	4 STAR INN	28
16	Pack Horse Inn	New Mills	4 STAR INN	24
17	The Rising Sun	Nr Castleton	4 STAR INN	24
18	Ye Olde Nag's Head	Cemetery Road	4 STAR INN	20
19	The Ashford Arms	Ashford in the Water	4 STAR INN	18
20	Millstone Inn	Hathersage	4 STAR INN	16
21	The Grouse & Claret	Rowsley	4 STAR INN	16
22	Batemans Mill Country Inn & Restaurant	Old Tupton	4 STAR INN	15
23	Moorfield Arms	Mellor	4 STAR INN	10
24	The Chequers Inn	Hope Valley	4 STAR INN	10
25	Scotsman's Pack Inn	Hathersage	4 STAR INN	9
26	The Mill Wheel	Ticknall Road	4 STAR INN	8
27	The Old Hall Inn	Chinley	4 STAR INN	8
28	The Poachers Arms	Hope	4 STAR INN	8
29	Royal Hotel	Dungworth	4 STAR INN	6
30	The Bulls Head Inn	Eyam	4 STAR INN	6
31	The Church Inn	Buxton	4 STAR INN	6
32	The Manifold Inn	Nr Buxton	4 STAR INN	10
33	The Plough Inn	Hathersage	4 STAR INN	0
34	The Samuel Fox Country Inn	Stretfield	5 STAR INN	8
35	The Devonshire Arms (Buxton)	Fairfield	AG	10
36	The Lawns Hotel	Chellaston	NG	42
37	The Boundary Lodge	Broadmeadows	NG	28
38	The Olde House	Newbold	NG	28
39	The Peacock	Bakewell	NG	26
40	The Mackworth	Mackworth	NG	26
41	Rambler Country House	Hope Valley	NG	24
42	The Crown Inn	Higham	NG	18
43	Harleys Bar	Staveley	NG	18
44	The Kings Arms Hotel	Chapel-en-le-Frith	NG	18
45	Ye Olde Crown Hotel	Waterhouses	NG	17
46	The Sycamore Inn	Birch Vale	NG	16
47	Bear Inn	Alderwasley	NG	16
48	Jodrell Arms	Whaley Bridge	NG	16
49	Pads leisure Ltd-The Cross Inn	Nr Waterhouses Leek	NG	16
50	The Queens Head & Public House	BUXTON	NG	16
51	The Unicorn Inn	Newton Solney	NG	16
52	Waltzing Weasel	Birch Vale	NG	15
53	The Lord Shrewsbury	New Road	NG	15
54	Square and Compass	Darley Dale	NG	14
55	Hollybush Inn Hotel	Matlock	NG	13
56	The Lord Nelson Inn	Ambergate	NG	12
57	Alton Bridge Inn	Alton	NG	12
58	Devonshire Arms	Peak Forest	NG	12
59	Ye Olde Bowling Green Inn	Bradwell	NG	12
60	Shoulder of Mutton	Bradwell	NG	11
61	The Derwent Hotel	Whatstandwell	NG	11
62	The Cheshire Cheese Inn	Hope	NG	10
63	Jug & Glass	Lea	NG	10
64	The Crewe and Harpur Arms	Swarkestone	NG	10
65	The Peaks Inn	Castleton	NG	10
66	The Boot Inn	Repton	NG	9
67	The Peels Arms	Padfield	NG	8
68	George & Dragon	Belper	NG	8
69	The Famous Shoulder	Pilsley	NG	8
70	The Lord Nelson	School Drive	NG	7
71	The Printers Arms	Birch Vale	NG	7
72	The Bulls Head	Hartshorne	NG	6
73	Bell Inn	Smalley	NG	6
74	Crown & Mitre	New Smithy	NG	6
75	Little Mill Inn	High Peak	NG	6
76	The Kings Head	Duffield	NG	6
77	The Shady Oak	Whaley Bridge	NG	6
78	The Navigation Inn	Overseal	NG	5
79	Vine Tavern	New Mills	NG	4
80	Angel Hotel	Spinkhill	NG	3
81	Woodroffe Arms	Hope	NG	-
82	Castle Hotel	Castleton	NG	-
83	Duckmanton Hotel	Duckmanton	NG	-
84	Highwayman	Eastmoor	NG	-
85	Snake Pass Inn	Ashopton Woodlands	NG	-
86	Strutt Arms Hotel	Derby Road	NG	-
87	The Lamb Inn	Congleton	NG	-
88	The Queens Head Hotel	Congleton	NG	-
89	The Torrs	New Mills	NG	-
90	Boat House Inn	Matlock	NI	-
91	Crispin Inn	Great Longstone	NI	-
92	Miners Standard	Winster	NI	-
93	Tavern at Tansley	Tansley	NI	-
94	The Plough Inn	Flagg	NI	-
95	The Queens Arms	Bakewell	NI	-
96	The Star Inn	Tideswell	NI	-

Source: VPD

Destination food shops tend to be located outside of the Peak District with Chesterfield and Derby having a particularly good offer. In Derby places like Jack Rabbit Kitchen and the Derby Pyclet Company and in Chesterfield the likes of Fredrick's of Chesterfield and Northern Tea are popular with visitors.

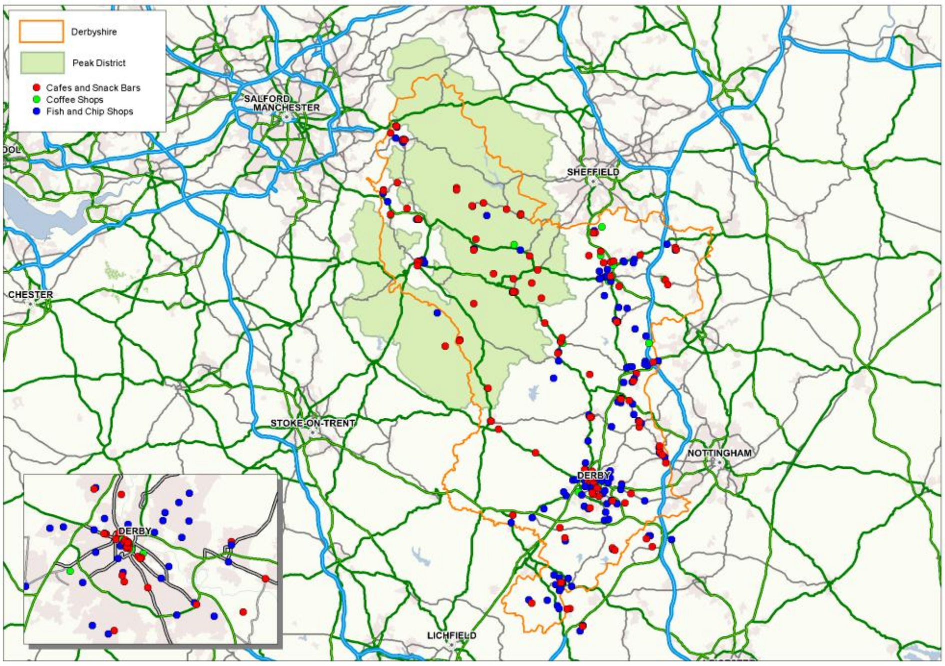
Figure 77: Destination Food Shops

	Name of Shop	*Location*	*Type*
1	Jack Rabbits Kitchen	Derby	Deli & Café
2	Fresh Basil	Belper	Deli & Café
3	Riverside Herb Centre	Hathersage	Deli, Herb Shop, Cafe
4	Brown & Green	Derby	Deli & Groceries
5	Jack Rabbits The Peoples Grocer	Derby	Café, Deli, Food Hall
6	Bluebells	Spondon	Farm Shop, Café, Ice Cream Parlour
7	Hackwood Farm Shop and Cafe	Radbourne	Farm Shop & Café
8	I Should Cocoa	Belper	Chocolate Shop & Cafe
9	Cameo Cupcakes	Derby	Cup Cake Shop
10	Chatworth Farm Shop	Bakewell	Farm Shop
11	The Loaf	Crich	Bakery, Deli & Café
12	Quirky Cookies and Cakes	Duffield	Cake Shop
13	Amber Valley Wines	Belper	Food & Drink
14	Northern Tea	Chesterfield	Tea Shop & Café
15	Frederick's of Chesterfield	Chesterfield	Ice Cream Parlour & Café
16	Marsh Green Farm Shop	Kelstedge	Butcher, Deli, Grocer, Farm Shop, Café

Source: Colliers International

There are a large number of cafes in the Peak District with coffee shops and fish and chip shops[8] located towards the larger urban centres.

Figure 78: Café's, Coffee Shops and Fish and Chips



[8] The CoStar Focus database identifies 'Fish and Chip Shops' as a separate food and drink category – Colliers International are NOT highlighting these as a particularly important part of the food and drink offer per se.

Source: Colliers International

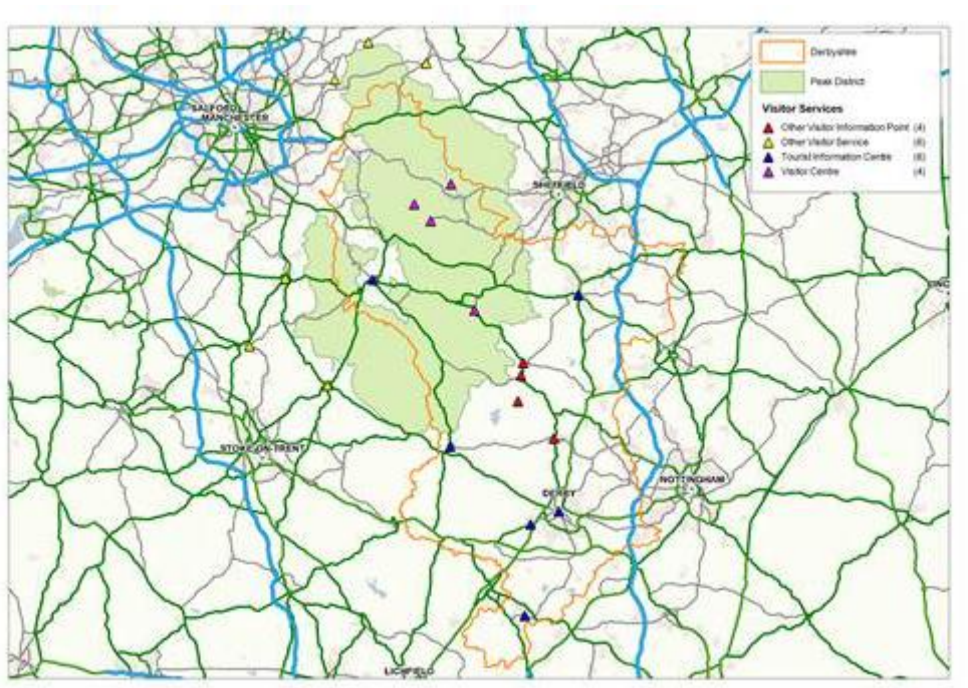
On the whole the food and drink offer in the county is going from strength to strength with quality local produce and an emphasis generally on good food and drink via events such as the recently established Derbyshire Festival of Food and Drink and the Derbyshire Food and Drink Awards which recognises the quality of the offer in the county.

4.13 VISITOR SERVICES

There is some consensus that the traditional model of the Tourist Information Centre (TIC) may need to be reviewed. In Derbyshire there are a number TIC's owned and run by various different bodies (councils, the National Park Authority). There are also a host of other models already in existence in Derbyshire such as Tourist Information Points (TIPs) and visitor centres.

All of these services offer something slightly different which is in part related to the fact that they are all run by different organisations. The TICs located within the main tourist hubs attract significant visitor numbers. For example Buxton TIC attracts over 500,000 visitors and Bakewell over 180,000 visitors per year. Generally however TICs require significant levels of funding from the organisations running them and generally struggle to run on a commercial basis. TICs in smaller locations such as Edale and North Mill in Belper usually sit within buildings which offer other services as well as information provision.

Figure 79: Visitor Services



Source: Colliers International

Some TIC's are volunteer run which raises a number of other issues such as the difficulty of recruiting and retaining volunteers and how to streamline the costs associated with running TIC's when staff wage costs are already at a minimum (usually the largest cost a TIC has to cover). Other TIC's are run by their local authority or the National Park.

4.14 SUMMARY

A comparison of our audit to the Visit England Destination Brand and Satisfaction Tracker 2011-12 add a further dimension to an analysis of the destination. The Visit England research is based on visitor perceptions of the Peak District and therefore the findings differ in some aspects from our findings. The reasons for the differences may be due to visitors not always being aware of the full extent of what is on offer to them in the area.

Based on visitor perceptions the research summarises a number of strengths and weaknesses for the area. These are;

High Level Strengths

- Unspoilt countryside

Medium Level Strengths

- Interesting towns and villages to visit
- Easy to find useful information about the destination when planning the trip
- Easy to book your trip/different parts of your trip in advance
- Welcoming and friendly people

Low Level Strengths

- Clean and tidy environment
- A place where I feel safe and secure

High Level Weaknesses

- None

Medium Level Weaknesses

- A destination that is easy to get to by public transport
- Easy to get around by public transport

Low Level Weaknesses

- Easy to find useful information about the destination when you're there
- Opportunities to eat/drink local food and produce

- Availability of festivals, music, sporting and cultural events

Interestingly, transport issues, festivals and events and opportunities to get local food and produce are all seen as weaknesses. Our analysis suggests that in each of these areas there are strengths but also opportunities for improvements to be made.

5 CONSULTATIONS

5.1 APPROACH & CONSULTEES

As part of the study, consultations took place with a wide range of stakeholders from the public, private and not for profit/ charitable sectors. The meetings, some of which were with individuals, others in groups, sought the opinions of those working in or with a particular interest in the visitor economy.

Organisations included people from; hotels and accommodation; visitor attractions and museums; retail; food and drink providers; cultural venues; event organisers; Local Authorities; the Destination Management Organisation. (A full list is provided in the appendix).

Discussions asked consultees to comment on the strengths and weaknesses in the visitor economy offer in the area and development opportunities which may or may not already be in the pipeline.

The sessions generated a significant amount of debate with a good level of consensus overall, as well as one or two areas where individuals' opinions differed.

The following captures the main themes which emerged for the area as a whole as well as thoughts about a number of destinations and hubs. Since the discussions invited participants to focus on anything that they felt was relevant or important, the following themes and destinations emerged from the debate and were not 'imposed' by the interviewers.

This is not intended to be present a complete list of all of the points which were raised since the meetings covered a very wide range of topics. Instead it focuses on those issues and points which were raised most often and were generally felt to be the most important overall.

Potential opportunities are identified in italics.

5.2 KEY CONSULTATION FINDINGS – THEMES

5.2.1 VISITOR ATTRACTIONS (CONSULTATION FINDINGS)

Generally there was a strong feeling that visitor attractions, including commercial attractions and museums, are important draws for any destination.

Most stakeholders feel that the area has a number of very strong, well known attractions which pull visitors from a wide area.

Chatsworth, which attracts over 700k visits annually to the house and gardens as well as large numbers for events, is seen as a particular strength. The Farm Shop is also an attraction in its own right.

Indeed, the area generally is thought to have a good portfolio of stately homes and houses which includes, amongst others, Hardwick Hall, Bolsover Castle, Renishaw Hall and Roche Abbey, operated by the National Trust and English Heritage, local authorities and private owners.

The Derwent Valley Mills World Heritage Site was also seen as a potential major draw although at present there is a limited amount to see and thus little joined up promotion.

Cromford Mill has an ambitious four stage development plan with the first phase due to open in 2014 and fundraising is underway for the second stage. This will provide an early focus for the visitor offer within the World Heritage Site.

A number of respondents (particularly those based in and around Derby) see the Silk Mill redevelopment as providing a major new attraction although the plans are for a staged redevelopment linked to the large fundraising target.

Overall, there is a feeling that Derwent Valley Mills as a whole should 'think big' and needs to have long term plans for a mixed offer which brings the buildings back into sustainable use, creating a distinctive visitor trail. The challenge of raising the necessary funds from public and private sources however, is widely recognised.

In addition, a small number of other attractions emerged as potential unique assets for the area which are yet to be fully exploited. These included Creswell Crags, which has particular historic significance but requires development funding to exploit the opportunity, and the Joseph Wright collection within the Derby Museum and Art Gallery which is to be toured internationally.

The Buxton Museum could be developed as part of the wider regeneration of the town (see 5.3.3).

A number of participants felt that, with the exception of Chatsworth, not enough is being done to link the major attractions with the rest of the visitor offer, for example through accommodation packages and links to the destinations and hubs. Marketing by the individual attractions is fragmented and there is a lot of duplication which could be reduced to free up resources to provide a wider reach.

Many consultees described the Peak District National park as the biggest attraction. This is covered in 5.3.1 below.

5.2.2 EVENTS (CONSULTATION FINDINGS)

The area is seen by stakeholders as offering a strong and varied events programme with some suggesting that the area 'punches above its weight' in terms of cultural and music events and festivals.

Derby city's events programme, including Feste, Forum and Deda, is seen as very important, both in terms of drawing visitors to the city and in generating positive media coverage. The public sector funding cuts are particularly significant to the events programme and some of the established cultural events are currently potentially under threat.

A number of people feel however that the city's events programme needs to be extended to create more animation and activity across the whole year. There is a feeling that visitors can turn up at certain times of year when nothing is happening and be confronted with a 'sterile' or 'lack lustre' experience in the city.

The Buxton Festival is seen by many people as very important, particularly in terms of raising the profile of the area and drawing in new visitors. At present the opera and music elements of the programme draw a wider audience than the literary festival which tends to attract a more local audience.

Many people, particularly those in and around Buxton, recognise that at present the accommodation stock in the town is limiting the potential of the festival and that the plans for the new and improved hotel stock (see 5.2.4) will allow more to be made of the event which is growing in recognition.

A number of other festivals and events also have good recognition, in some cases to particular markets. Those mentioned included Y Not?, the Darley Park Classical Music Festival, the Derbyshire Literary Festival, the Stainsby Festival (folk music), the Ilkeston Charter Fair (the oldest and largest street fair in Europe) and the Belper Music Festival.

As with the attractions, several consultees feel that the opportunities for linking festivals and events to the wider destination offer is not being fully exploited. Some also feel that because the wider destination lacks definition, this limits the extent to which the area can develop a reputation as a vibrant place for events and festivals. In particular, the Chatsworth events programme, although seen as very important, is thought to be quite self-contained, benefiting Chatsworth and some accommodation providers but not being exploited fully by the wider destination.

In addition to the established events programme, there is an aspiration to create a major iconic new event within the National Park. L' Eroica is a light hearted heritage cycling 'race' where participants dress up in traditional cycling clothes and ride retro bikes along scenic routes. Lavish local food is all part of the experience. Funding is being sought to bring the event to the Park, linking with the development of the cycling offer in the Peaks.

The Festivity Group is seen as a valuable forum for bringing together all of the promoters of festivals throughout Derbyshire although the lack of funding is now a critical issue.

Two new sports venues, a velodrome and a multi sports area will be opening in Derby in the next few years and these will present opportunities for the city to attract other major, high profile sports events.

In addition, many events attract primarily day visitors and there is a feeling that if events could be extended and promoted as more than a day visit then this might help attract more staying visitors to the area.

5.2.3 CULTURAL & MAJOR VENUES (CONSULTATION FINDINGS)

The importance of cultural venues in Derby was discussed widely and many consultees agree that there is a need for a bigger performance venue, capable of holding up to 1,500 people. Over the last seven or eight years there have been a number of reports produced looking the different options. The Assembly Rooms site is seen as potentially the most realistic option.

Some people anticipate that once the two new sports venues (the velodrome and multi sports venue) are completed in the city, the new cultural venue may become the priority. This may enable the required capital funding to be found. The issue of on-going revenue funding is seen as an important one however, particularly amongst the existing venue operators.

Some people also commented that the promotion of the cultural venues is too fragmented and that the offer would be stronger if there was more promotion of the city's cultural offer as a whole.

Culture Derbyshire, the delivery mechanism for the Derbyshire Partnership Forum, is potentially a valuable and powerful partnership for the sector as a whole which could enable to development of both venue development and the cultural offer as a whole.

A number of people mentioned conferencing, particularly those based in Derby. Most feel that the city is well provided for through hotels and other venues and that the new sports venues may add new flexible spaces. A new theatre, if it is built, should also be versatile and able to host conferences and potentially exhibitions.

Within the National Park area, there are a small number of potential development schemes for hotels with conferencing facilities although securing funding appears to be a problem for commercial developers at present. The Marquis of Granby site near Bamford was mentioned as one scheme where work had started and stalled but may resume at a later date.

5.2.4 ACCOMMODATION (CONSULTATION FINDINGS)

Perceptions about the range and quality of accommodation varied in different parts of the area.

Derby is seen as having a good range of branded hotels, particularly 3* and budget properties although there were some comments that the rates were not always competitive enough. A number of hotel operators in the city went as far as saying that in fact there is now an over-supply of hotels in Derby.

Several hotels in the city are heavily dependent on business travellers during the week and find it more difficult to fill rooms at weekends.

Although some packages are arranged for example linking accommodation to festivals and events, many consultees feel that more could be done to promote leisure breaks all year round, linking hotels to cultural events and attractions. Some people feel that a barrier is the fact that at present there is no collective forum which links all of the hotels with the attractions and venues although Visit Derby is seen to be doing a good job at developing this area.

In Buxton there is general agreement that the hotel accommodation is very limited at present although there is a good mix of self-catering accommodation and camping and caravanning provision around.

The reopening of the Crescent as a 5* spa hotel is one of the most eagerly anticipated schemes. The building will include the hotel, a restaurant and café, a visitor centre, some independent retail and the natural spa which will be available for use by non-residents. The developer also has plans to upgrade the Old Hall Hotel (which he now owns) to a 4* property and to convert the George to 3*.

Most consultees in and around the town believe that other aspects of the Buxton offer, such as retail and food, will need to 'raise its game' in order to take advantage of the opportunity.

Elsewhere within the Park, it is felt that the quality of accommodation is mixed and includes some excellent high end properties as well as some which are tired and in need of upgrading. Budget hotels around the area are generally doing well, particularly in Glossop which appears to attract both business and leisure travellers.

The area around Matlock, Matlock Bath and Leek was mentioned several times as having a poor accommodation stock at present. Bolsover was mentioned as lacking any volume of accommodation and the Amber Valley was recognised as another place with a lot of middle of the range stock. The Derbyshire Dales was seen as lacking a 'destination hotel' whilst South Derbyshire and The National Forest was one of the few places where good quality accommodation stock was seen to be growing.

Several people mentioned that Chesterfield has a surprisingly good hotel stock, including the interesting Casa. More could be made of the potential of the town to act as a gateway to the Park, potentially particularly targeting the family market.

In rural areas as well as in the bigger towns and Derby, it is felt that some of the pubs could be upgraded to offer attractive rooms but in many cases tenanted landlords are not able or willing to invest to make this happen. The Breweries would need to be persuaded of the value if this is to happen.

Overall, it is felt that there is a lack of appropriate accommodation to support the festivals and events and that more cycling friendly accommodation will be needed to support the cycling development plans.

5.2.5 PUBLIC TRANSPORT & ACCESS (CONSULTATION FINDINGS)

Public transport to the major destinations and to the edges of the area is seen as good or excellent. Road links are also generally thought to be very good in most places. Events at Chatsworth can cause congestion around Bakewell although there is little that can be done in addition to the traffic management which the venue already puts in place. Chesterfield can also experience congestion as a gateway to the Peak District.

The M1 also becomes congested at times and there is going to be disruption for 18 months from the roadworks between J28 and J31. *Visitors need to be given good information and public transport alternatives.*

Public transport within the Park however is widely seen as poor. The train services which do run (see 4.2) are infrequent, overcrowded and expensive. There is very little capacity for carrying bikes which is likely to limit the cycling development ambitions.

The improvements which may be made to the Manchester to Buxton line would be an important step.

Many consultees believe that transport operators need to be brought more activity into the visitor economy forums and there should be a particular focus on the Hope Valley and Derwent Valley Lines.

Cycle racks could be installed on buses.

South Derbyshire has also recently introduced a National Forest 'Hopper Bus' which links the main attractions with the main towns. The Arriva service runs along an existing route and is supported by residents but is marketed towards tourists and has proved successful in terms of dispersing tourists to different areas within the local authority. This type of scheme is something that could be looked at more widely within Derbyshire as a whole.

The idea of getting access and transport to be viewed as part of the visitor experience was a popular one whereby visitors are encouraged to use a multitude of different and fun modes of transport along their journey such as cycling and steam railways. This would help address the issue of the dominance of cars currently coming into the park.

5.2.6 PARKING (CONSULTATION FINDINGS)

There was refreshingly little discussion about parking (a topic which dominates most destination consultations elsewhere!)

Parking in Derby, some suggested, is quite expensive.

Parking in Buxton is insufficient and rather chaotic. This will need to be addressed in light of the Crescent development and the regeneration of the town which this will bring.

There are a number of car parks run by different organisations across the county i.e. councils, The National Park Authority and some consultees asked the question of whether there was an opportunity for more joined up thinking in relation to how these are run and managed which might amount to a cost saving/reduction in resources.

There is also seen to be lack of parking provision in some towns for coaches – Belper being a prime example of this.

5.2.7 RETAIL (CONSULTATION FINDINGS)

Derby has seen a step change in its retail offer since the opening of Westfield and whilst it is generally used by residents and those living nearby, it has improved the opportunity to promote the city as a short break destination.

Saddler Gate is seen as a strong independent area within the city although issues such as Sunday closing and a rowdy evening crowd were mentioned as negatives.

The Market Hall is seen as presenting an important opportunity to create a very distinctive retail offer in the city. The building is extremely fine and already has a number of artisan businesses such as Derby Pikelet. Several consultees talked about how more should be made of the Market as a visitor draw, encouraging more high quality and unusual businesses and entrepreneurs to take units. Investment would be needed in the building to take advantage of the opportunity.

Some concerns were also mentioned surrounding the number of voids in some areas of Derby such as Albion Street just outside Westfields. *There is a need to engage some of the big landlords, the owners of some of the void units to ensure that they are not left empty and encouraging a continuous visitor flow throughout all areas of the city. It is felt that the LEP could play a key role in negotiations to this end.*

The Gateway in Chesterfield is primarily used by locals but helps the town in its gateway role.

The East Midlands Designer Outlet, which became an outlet village in 2001, currently attracts around 2.7m visits annually, mainly from the surrounding urban areas. The retail offer has typically focussed on budget and mid-market brands although there are investment plans to increase the number of high end names and to introduce new facilities such as conferencing to take advantage of the excellent market catchment and access. The operator, McArthur Glen also has ambitions to grow international visits, exploiting the proximity to East Midlands airport.

A number of the market towns are seen as having a high quality independent offer which is attractive to visitors. Glossop in particular has a reputation for independent high quality food shops as well as other small but interesting outlets. Vacancy rates are just 6%, below the national and regional averages. *The indoor market is currently seen as somewhat disappointing but could be developed into an interesting and quirky addition to the town.*

It is recognised that the retail offer in Buxton, which is largely independent, needs to be improved and the University's Retail Academy presents and important opportunity.

Indeed across the area there are a number of initiatives which it is felt will be very beneficial in the medium term in improving the retail offer. In the High Peaks and Staffordshire there is an initiative to encourage landlords to develop smaller units which are appropriate for start-up and craft retailers. Derbyshire Retail Help is working with town teams to develop and improve independent retail.

All of these initiatives need to be linked in to the visitor economy since it is such an important part of the offer. Some consultees talked about the 'dangers' of independent shops being closed on the Sundays and the damage this does to destinations. Retailers need to see themselves as part of the visitor offer but also need support to ensure that this is viable for them.

5.2.8 THE DESTINATION (CONSULTATION FINDINGS)

One of the most significant issues, raised by most consultees, was the lack of definition for the 'destination'. Clearly Derby and some of the larger towns have a profile in their own right. The area as a whole however has indistinct boundaries and is branded in a number of different ways with signs on roads and motorways offering a confusing sense of arrival.

Most people believe that the Peak District should be the overarching destination brand and that the use of the Derbyshire Dales and the Staffordshire Moorlands for example dilutes the opportunities presented by the magnificence of the National Park.

This single brand should be promoted consistently.

5.2.9 OTHER THEMES (CONSULTATION FINDINGS)

The following summarises the other topics or issues which were mentioned by consultees:

- *There is a general lack of research about visitors to the area, particularly in and around the park. Good primary research would be extremely useful in helping to understand who visits, where they stay, what they do and how they travel around.*

- *Broadband coverage is still poor in many areas in the park. This is expected by visitors these days and needs investment.*
- *Brown signs are good in some places and poor in others. Brown signs off the M1 are confusing in terms of branding. The Derwent Valley Mills WHS needs better signage throughout.*
- *Tourism is nearly always fragmented because it involves so many businesses and organisations from different sectors. The LEP can play a role in providing greater cohesion and joining up the relevant sectors, dealing with the infrastructure issues etc.*
- *The impact that the new planning regulations will have on tourism is still unknown. The sector needs to be ready to respond.*
- *The inference that the current model of TIC's is outdated and what the relevant adaptations/new models might be.*
- *The need to address the predominance of day visitors and seasonal imbalance via improvements and additions to the tourism product.*
- *The need to develop well defined packages for visitors which leads them around the area using a joined up approach which includes a consideration of transport, attractions, visitor accommodation and smaller places of interest which need to be highlighted on a visitor route.*

5.3 KEY CONSULTATION FINDINGS – DESTINATIONS & HUBS

5.3.1 PEAK DISTRICT NATIONAL PARK (CONSULTATION FINDINGS)

The National Park is widely recognised as the 'jewel' in the area. Although it is very well used, particularly by people living in the conurbations which surround it, it is felt that it lacks the clear identity that the Lake District, for example, enjoys. This is partly because the boundaries 'bleed' into so many different cities and counties.

The problem is exacerbated by the proliferation of brands that are used to describe it and there are lots of examples of parts of the area being badged in different ways on high profile road signs and brown signs. Different organisations also refer to it in different ways.

If agreement could be reached about a common name which would be used consistently, this would be a major step forward. It would allow the marketing through all channels to be much more effective. Reaching agreement and delivering consistency however is recognised as a big challenge.

The fact that the National Park is so accessible to such large numbers of people is both a strength and to some extent a weakness. It offers enormous potential to develop the visitor economy but tends to attract very large numbers of day visits. It will always be difficult to persuade people to stay overnight when it is so easy to get home.

A number of opportunities were suggested for growing overnight stays. New, interesting accommodation, a dynamic events programme, a stronger food and drink offer and off peak packaging with good deals were all seen as key.

It was also acknowledged by some that although the National Park Authority provides excellent landscape management and that Visit Peak District is effectively promoting the area, there isn't a body responsible for and resourced to deliver destination management. Responsibility falls across a number of different authorities leading to an inconsistent approach. There are clearly very significant resource implications involved however so this is very unlikely to be resolved in the short or medium term, if ever.

It was also felt that the Park should be attracting more international visits. All of the national parks should work collectively to market to the most realistic overseas markets, working with VisitBritain.

5.3.2 DERBY CITY (CONSULTATION FINDINGS)

Derby is seen as having both substantial strengths as well as important weaknesses. The city centre has benefitted from significant regeneration in recent years, with the Westfield shopping centre development seen as a particular tipping point.

Amongst the strengths regularly mentioned were: the relatively strong economy and high average wages; the pleasant 'Spanish feel' night time economy, particularly in summer; the safe but rather bohemian areas on the edge of town; the events programme; the cultural offer; and the real ale pubs. A number of individual businesses were also mentioned as being excellent including some restaurants and bars and Cathedral Quarter hotel. Saddler Gate was quoted as both a strength and a weakness.

Weaknesses included the lack of a USP (unique selling point); the difficulties of getting on to the 'short break destination list'; dead spaces on Sundays, particularly around Saddler Gate and the Museum and Art Gallery; the lack of investment in the Museum and Art Gallery and the fact that the Silk Mill is currently closed.

Two significant issues are felt to be the lack of city centre living and the paucity of city centre employment. Many major employers (apart from the Council) are located outside of the city centre and most residents live in the suburbs or beyond. These factors combined limit the demand for restaurants and bars and almost certainly have implications for cultural and entertainment venues. Manchester, by contrast, has a much larger stock of city centre offices and a significant number of city centre apartments. As a result, restaurants, cafes and bars enjoy a day time into evening trade and those living and working in the city, particularly young professionals, will often stay out socialising and taking advantage of the evening economy. This is recognised in Derby's development strategy and remains an important long term goal. Clearly, there would be a subsequent positive impact on the visitor economy if this is achieved.

A number of development opportunities emerged from discussions:

- *Introduce a city bike scheme*
- *Implement a river bus service*
- *Encourage a 'pavement culture' with more outdoor eating and drinking to add vibrancy*
- *Add more wayfinding signs. (The new ones are excellent but more are needed)*
- *Invest in the Market Hall. Turn it into a Borough Market type experience*
- *Use the new sports venues to attract high profile events*
- *Make more of the gateway to the Peak District role*
- *Develop the Silk Mill as a major attraction*
- *Extend the events programme to provide animation all year round*
- *Encourage more joined up working between hotels, cultural venues, and retailers etc.to sell the city's offer better.*
- *Invest heavily in the city as a short break destination, working with East Midlands airport and potentially Doncaster Sheffield airport.*

5.3.3 BUXTON (CONSULTATION FINDINGS)

Buxton has a number of outstanding assets. The built environment, which still retains much of the original Georgian and Victorian architecture, is thought to be particularly attractive and the setting within the National Park presents a unique opportunity.

The town has been through a long period of decline but is now being regenerated and there is a growing feeling of optimism. The restoration of the Crescent is bringing a number of tangible and intangible benefits, some of which can already be seen. For example, a new microbrewery and a brassiere have recently opened and there has been an increase in the number of good quality independent shops which have opened up.

The location of the University within the town is also seen as extremely important. The University now occupies the striking former hospital building in the town centre which was previously disused. It is now open to the public and includes a café as well as various facilities and services which are provided by students as part of their training. The presence of students within the town is helping to sustain restaurants, bars and entertainment venues and since most courses run over two years, students are around throughout the year.

Most consultees agree that there is still a need for improvement however. The accommodation stock is currently poor and retail vacancies, although dropping, are still having a negative impact on the town centre.

The festivals and events programme has a growing national reputation but tends to appeal to an older, affluent market. There is little in the annual programme that is populist or appeals to younger visitors.

Overall, there is a sense that the town has a brand which is traditional and staid and which appeals to the grey market. It does not draw a diverse mix of visitors and potentially hinders the University in its ambition to establish an international reputation.

Suggestions for improvements included:

- *Invest in the indoor market which is currently only open Thursday to Saturday.*
- *Put training in place to allow businesses to 'up their game' to support the investment in the Crescent.*
- *Encourage investment in the Victorian facades and shop fronts, some of which are tired and tatty.*
- *Extend the events and festivals programme to include events which draw wider audiences.*
- *Take advantage of the Crescent to market the town and particularly the festivals nationally and internationally.*
- *Work with the transport operators to improve links from Manchester Airport and Manchester and Sheffield cities,*

5.3.4 CHESTERFIELD (CONSULTATION FINDINGS)

Several consultees (not just those working in Chesterfield) feel that Chesterfield has untapped potential as a gateway to the Peak District.

The town has ambitions to become a contemporary destination as well as a historic market town and visitor numbers are growing, albeit from a fairly modest base. It has excellent road and rail access from the north and the south and provides quick and easy access into the heart of the Peaks.

It has a number of existing strengths. The Market Hall has had significant investment and the canal has been restored. There is a good mix of independent and branded restaurants, including a good selection of eateries which are attracting younger people. The town also has a good reputation for its bars, wine bars and real ale pubs but there is a will to improve the evening economy further.

The annual Walking Festival takes advantage of the town's rural hinterland, the Transpennine Trail passes through the centre and there is an integrated network of cycle trails and routes. The Art Trail is an interesting feature. Some consultees mentioned extending the existing events and festivals programme.

The Chesterfield Canal was also seen as offering opportunities for the maximisation of development.

The Casa Hotel was mentioned a number of times as a contemporary and rather ‘funky’ budget property that is well suited to the city break and short break market.

Generally there is a feeling that it should be promoted more assertively and that the businesses need to be better connected into the visitor economy so that they can see the potential and can develop to take advantage of the opportunity.

5.3.5 THE NATIONAL FOREST (CONSULTATION FINDINGS)

The National Forest has ambitious plans which include the development of more leisure and recreation facilities within the designated area.

The focus is on sustainable activities and facilities and the offer currently includes a number of cycling, walking, watersports and horse riding facilities.

There is also a good range of visitor accommodation which includes the forest lodges within the Rosliston Forestry area, jointly owned by Derbyshire District Council and Forest Enterprises.

At present, the majority of visits are thought to come from local people and day visitors from the major cities in the surrounding area. There is an intention however to grow the number of overnight trips, exploiting the central location and excellent access.

Attractions, particularly Conkers, will play an important part in achieving this and plans are currently being developed to increase the number of visits to the centre.

Whilst the National Forest provides some similar facilities to the Peak District, it has a very different and distinct character. Over the longer term it has the potential to be exploited as a unique destination which is easily accessible within the central belt of England.

The National Forest has the potential, over time, to become a destination in its own right. It should consider developing its own destination development strategy and considering ways in which it can increase its profile as distinct from the Peak District National Park.

5.3.6 OTHER DESTINATIONS & HUBS (CONSULTATION FINDINGS)

- *Castleton is an important visitor hub that provides most of the services, facilities and attractions that visitors need. Public transport links could be better and some of the businesses could benefit from investment although there has been improvement in recent years.*

- *New Mills is something of a hidden gem. The Millennium Walkway is an interesting but little known feature. Tor Vale Mill is a privately owned Grade 2* listed building. The owner has recently relocated his business there and has plans to develop some of the unused space into holiday accommodation which could link well with the cycle and walking trails. He is also in discussion with the Youth Hostel Association.*
- *Glossop has a strong independent retail offer and the mills have potential for development as visitor accommodation as well as business units for creative industries.*
- *Ilkeston and Long Eaton are not really recognised or promoted as visitor destinations although both have some potential. The Ilkeston Charter Fair which takes place each October is one of the largest in Europe and has potential as a draw for the autumn breaks market. The Long Eaton Triathlon is growing in popularity and taps into the increasing popularity of adventure sports.*
- *Ashover lacks accommodation but is reasonably close to the Designer Outlet and offers some excellent restaurants. Joined up marketing with McArthur Glen could encourage attract and disperse.*
- *The Roaches and Dove Valley are not widely recognised as part of the Peak District but have good recognition and are well used, particularly by outdoor and activity markets. They should be better integrated into the Peak District brand.*
- *Derwent Valley Mills and Belper mainly draw day visits but can offer a number of attractions including the Crich Tramway Museum, Denby Pottery and the Midland Railway. These should form part of the short break offer, particularly targeting families and shoulder season breaks.*
- *Bolsover has a major asset in the castle but there is a challenge in terms of how to link the draws of the castle to the town. In order for this to happen there needs to be more work in terms of upgrading the offer within the town and encouraging standardised opening hours.*

5.4 SUMMARY & IMPLICATIONS FROM CONSULTATIONS

The consultations have identified a wide range of development opportunities and gaps, some of which are already being developed by the public and private sectors and others which are longer term prospects or aspirations. In some cases these opportunities relate to individual venues, in others to wider destination development requirements. There are particular infrastructure gaps around public transport.

In addition to the physical development opportunities, there is a general sense that more should be made of existing assets through joined up working, better promotion, reduction in duplication (of marketing and resources) and staff training.

The peripheral parts of the area could be used more as part of the ‘attract and disperse’ ambition, focusing in some cases on particular markets.

The overarching finding however is the need for a consistent destination brand for the area and whilst it is recognised that achieving this will be difficult and may require intervention at very senior level from the LEP, would be the single biggest achievement which could result from this study.

The implications will be explored in the second stage of this report.

6 TOURISM IMPACT ASSESSMENT

6.1 INTRODUCTION

Outlined below is a baseline assessment of the value of tourism to the sub-regional economy. Three principal measures of value have been considered: consumer spending; economic contribution (gross value added); and tourism related employment. The methodology adopted to assess the value of tourism has been informed by guidance produced by VisitEngland[9] and the Tourism Intelligence Unit at the Office for National Statistics (ONS).[10]

6.2 CONSUMER SPENDING

6.2.1 OVERVIEW

In line with VisitEngland guidance, the level of tourism-related consumer spending has been calculated in relation to four basic components:

- inbound (overseas) visitor spending;
- domestic outbound visitor spending;
- domestic overnight visitor spending; and
- domestic day visitor spending.

The level of expenditure has been calculated for Derbyshire as of the year 2011, where feasible, to provide consistency across each component of spending.

6.2.2 INBOUND (OVERSEAS) VISITOR SPENDING

Information in terms of inbound visitor spending has been sourced from the International Passenger Survey. The key indicators for Derbyshire are outlined in Figure 80 . Overall it is estimated that, as of 2011, the total spend of inbound visitors within the sub-region amounted to approximately £78.5 million. The number of visits by overseas residents was around 200,000.

Of the total spend from inbound visitors to Derbyshire, 33% was attributable to business trips, with a further 33% generated from visits to friends and relatives. Only 14% of inbound visitor spend was from people holidaying in the sub-region. The average spend per visit was also lowest for those who were in Derbyshire for the purposes of a holiday (£280.7 per visit).

[9] VisitEngland ( ), *What is Tourism Worth: Understanding the Value of Tourism at Regional and Sub-Regional Level.*

[10] ONS (2011), *The Sub-Regional Value of Tourism in the UK in 2008.*

Figure 80: Inbound visitor spending, 2011

	Visits (000s)	*Nights (000s)*	*Average duration*	*Spend (£m)*	*Average spend (£)*
Business	60.9	572.9	9.4	26.0	426.3
Holiday	38.5	266.2	6.9	10.8	280.7
Other	10.2	194.8	19.1	12.6	1,233.9
Study	1.2	46.6	39.6	3.2	2,757.4
VFR	89.3	725.2	8.1	25.9	290.2
TOTAL	200.0	1,805.6	9.0	78.5	392.4

Source: International Passenger Survey, ONS

6.2.3 DOMESTIC OUTBOUND VISITOR SPENDING

As identified in VisitEngland guidance, although commonly overlooked, spend by domestic outbound visitors within the sub-region on goods and services such as travel to the airport is a further source of expenditure supporting the local tourism economy. It therefore needs to be considered as part of assessing the overall value of the tourism economy.

[The most recent source of data for domestic outbound visitor spending at the county level is from the International Passenger Survey for 2008.[11] HM Treasury GDP deflators have been applied to provide an indicative figure for 2011, although it should be noted that this does not take into account any potential change in the volume of spend.]

In total, allowing for inflation and assuming the volume of spend has remained broadly constant since 2008, it is estimated that domestic outbound visitors spent £27.0 million on goods and services within Derbyshire in 2011.[12]

6.2.4 DOMESTIC OVERNIGHT VISITOR SPENDING

The Great Britain Tourism Survey (GBTS) provides information on the volume and value of all domestic overnight tourism, with data available at the county and local authority levels. Set out in Figure 81 are the key indicators for Derbyshire and its component districts.

Overall, overnight visitors to Derbyshire in 2011 were estimated to have spent around £256.0 million in the sub-region. Based on a total number of trips equating to approximately 1.9 million, this represents an average expenditure per trip of £134.1. The largest proportion of visitor spend was in Derbyshire Dales (35%), followed by Derby (26%).

[11] Awaiting confirmation from VisitEngland
[12] Source: International Passenger Survey, ONS – adjusted to 2011 price base

Figure 81: Domestic overnight visitor spending, 2011

	Trips (000s)	*Nights (000s)*	*Average duration*	*Spend (£m)*	*Average spend (£)*
Amber Valley	116.0	271.0	2.3	9.0	77.6
Bolsover	41.0	110.0	2.7	6.0	146.3
Chesterfield	217.0	427.0	2.0	26.0	119.8
Derby	513.0	1,215.0	2.4	66.0	128.7
Derbyshire Dales	552.0	1,679.0	3.0	89.0	161.2
Erewash	36.0	82.0	2.3	4.0	111.1
High Peak	385.0	1,099.0	2.9	52.0	135.1
North East Derbyshire	5.0	10.0	2.0	-	-
South Derbyshire	23.0	46.0	2.0	2.0	87.0
Unspecified	25.0	93.0	3.7	2.0	80.0
Derbyshire	1,909.0	5,032.0	2.6	256.0	134.1

Source: Great Britain Tourism Survey, VisitEngland

Based on 2-year averages (for 2011 and 2012), an estimated 38% of domestic overnight visitor spend was on accommodation. Other items notable items of expenditure included ravel costs (19%), eating and drinking out (18%), shopping (15%) and entertainment (6%).

6.2.5 DOMESTIC DAY VISITOR SPENDING

Information on domestic day visitor spending is provided by the Great Britain Day Visits Survey (GBDVS). A detailed annual report produced by VisitEngland, Visit Scotland and Visit Wales sets out data at the county level in relation to number of visits and expenditure. Data is also available for some local authorities, although not all those within the Derbyshire.

As outlined in Figure 82, total domestic day visitor spending in 2011 within Derbyshire is estimated to have amounted to £673 million. There were 23.0 million visits, with an average spend of approximately £29.27.

Figure 82: Domestic day visitor spending, 2011

	Visits (000s)	*Expenditure (£m)*	*Average spend (£)*
Derbyshire	23,020	673.83	29.27

Source: Great Britain Day Visits Survey, VisitEngland, Visit Scotland and Visit Wales

VisitEngland has provided a breakdown of domestic day visitor expenditure within Derbyshire by broad category, based on 2-year averages (for 2011 and 2012). An estimated 46% of visitor spend was on eating and drinking, with 26% on transport and 16% on 'special' shopping (non routine). A further 11% was on entrance charges, with the remainder (1%) being on other items.

6.2.6 SUMMARY OF VISITOR SPENDING

A summary of visitor spend within Derbyshire, outlining each of the four main components, is set out in Figure 83. Overall, it is estimated that in 2011 there was some £1,035 million of visitor expenditure within the sub-region. The largest proportion of this was generated by day visits (67%).

Figure 83: Total visitor spending, 2011

£m	*Inbound (overseas) visitors*	*Domestic outbound visitors*	*Domestic overnight visitors*	*Domestic day visitors*	*TOTAL*
Derbyshire	78.5	27.0	256.0	673.8	1,035.3

Source: Great Britain Day Visits Survey, VisitEngland, Visit Scotland and Visit Wales

6.3 ECONOMIC CONTRIBUTION

Within VisitEngland's guidance on understanding the value of tourism at the regional and sub-regional level, the economic contribution of the sector is measured through calculating the direct gross value added (GVA) generated by tourism.[13] This provides an indication of the proportion of tourism activity within the sub-region that contributes to economic growth.

For the purposes of this assessment, it has not been possible to undertake a bottom-up analysis of the demand and supply side of the tourism sector within Derbyshire. As such, a benchmark ratio has been calculated in terms of consumer expenditure and GVA, based on data produced by the Tourism Intelligence Unit.

Using information on the size of the tourism economy within Derbyshire in 2008, it is estimated that the ratio of direct GVA to visitor expenditure is 0.39:1. In other words, for every £1 of visitor spend, 39p of direct GVA is generated within the local economy. On this basis, the tourism sector in Derbyshire is estimated to have generated £402 million of direct GVA.[14]

[13] GVA is defined by ONS as: "the difference between output and intermediate consumption for any given sector/industry. That is the difference between the value of goods and services produced and the cost of raw materials and other inputs which are used up in production."

[14] As well as the direct GVA impact of tourism (for example, visitor spend on accommodation), there will also be indirect effects via businesses' supply chain expenditure. This is considered in Section 6.5.

Figure 84: Total GVA, 2011

	Total visitor spend (£m)	*GVA:visitor spend ratio*	*Total GVA (£m)*
Derbyshire	1,035.3	0.39:1	401.9

6.4 TOURISM-RELATED EMPLOYMENT

6.4.1 OVERVIEW

The standard approach to estimating tourism-related employment is to use information from ONS's Business Register and Employment Survey (BRES). This can be used to provide employment data for individual tourism-related industries at a local authority and county level. The appendix outlines the tourism industries as defined by the UN World Tourism Organisation (UNWTO).

The UNWTO definition of the tourism sector can be considered to provide a broad measure of tourism-related employment. It includes industries such as hotels and travel agencies as well as taxi operation and take-away food shops.

For a number of the industries encompassed within the UNWTO definition, only a proportion of the employment supported will be directly related to tourism activity. Therefore, for the purposes of this baseline assessment, a narrow measure of tourism employment has also been provided, using average GVA per employee data derived from the Annual Business Survey (ABS).

6.4.2 TOURISM-RELATED EMPLOYMENT – BROAD MEASURE

Based on data from the BRES and applying the UNWTO definition, the total number of people in Derbyshire employed in tourism-related industries in 2011 was 31,525. Some 29,843 were classed as employees, of which 12,909 (43%) were in full-time jobs and 16,932 (57%) were in part-time employment.

At the local authority level, Derby contained the largest number of people employed in tourism-related industries. However, this is principally reflective of the fact that Derby is the main employment location in sub-region. Derbyshire Dales had the largest proportion of people employed in tourism-related industries, representing 11% of total employment.

Figure 85: Tourism-related employment – broad measure, 2011

	Employees	*Full-time*	*Part-time*	*Employment*
Amber Valley	3,467	1,393	2,074	3,623
Bolsover	1,352	523	829	1,423
Chesterfield	2,713	1,086	1,627	2,892
Derby	9,060	4,379	4,681	9,382
Derbyshire Dales	3,827	1,658	2,168	4,104
Erewash	2,850	1,118	1,731	3,016
High Peak	2,450	1,022	1,428	2,663
North East Derbyshire	2,146	844	1,302	2,282
South Derbyshire	1,978	886	1,092	2,140
Derbyshire	29,843	12,909	16,932	31,525

Source: BRES, ONS

6.4.3 TOURISM-RELATED EMPLOYMENT – NARROW MEASURE

As discussed above, not all employment in tourism-related industries will be dependent on visitor activity. So as to provide a measure of tourism-related employment that more strictly corresponds to the estimates of visitor expenditure and GVA set out in Sections 6.2 and 6.3, data from the ABS has been used to calculate average GVA per employee benchmarks.

For the main tourism industries, at a two digit Standard Industrial Classification, GVA per employee ratios have been calculated and then aggregated, based on the breakdown of employment within the sub-region, to provide an overall GVA per employee ratio for tourism-related employment in Derbyshire. This has then been applied to the estimate of GVA set out in Figure 85.

Based on this measure of tourism-related employment, it is estimated that in 2011 there were around 14,208 people employed in Derbyshire as a direct result of visitor expenditure. Of these, 13,450 were classed as employees, with 5,818 (43%) working full-time and 7,632 (57%) in part-time employment (see Figure 86).

Figure 86: Tourism-related employment – narrow measure, 2011

	Employees	*Full-time*	*Part-time*	*Employment*
Derbyshire	13,450	5,818	7,632	14,208

6.5 SUMMARY

6.5.1 DIRECT TOURISM IMPACTS

Figure 87 sets out a summary of the key measures of tourism's value to the sub-regional economy. Based on the above analysis, tourism is estimated to have resulted in £1,035 million of visitor spend within Derbyshire in 2011, generating £402 million of GVA. Employment in tourism-related industries stood at 31,525, with 14,208 jobs directly supported by visitor expenditure.

Figure 87: Summary of direct tourism impacts, 2011

	Total visitor expenditure (£m)	*Total GVA (£m)*	*Total employment – broad measure*	*Total employment – narrow measure*
Derbyshire	1,035.3	401.9	31,525	14,208

6.5.2 INDIRECT TOURISM IMPACTS

In addition to the direct effects outlined above, there will also be indirect impacts of tourism activity on other sectors of the economy, principally through supply chain expenditure. In order to provide an approximation of the scale of these indirect effects, reference has been made to STEAM data for Derbyshire, from which expenditure and employment multipliers can be derived.

In terms of Derbyshire, the STEAM data suggests an expenditure multiplier of 1.40 and an employment multiplier of 1.24. Figure 88 shows the direct and indirect impact of tourism within Derbyshire on the basis of these multipliers.

Figure 88: Summary of direct and indirect tourism impacts, 2011

Derbyshire	*Total visitor expenditure (£m)*	*Total GVA (£m)*	*Total employment – broad measure*	*Total employment – narrow measure*
Direct	1,035.3	401.9	31,525	14,208
Indirect	415.4	161.3	7,633	3,440
TOTAL	1,450.7	563.1	39,158	17,649

There will also be induced effects arising from the spending of income obtained by people employed as a result of the direct and indirect impacts outline above. However, as part of this study, it has not been possible to determine a suitably robust measure of the induced impacts of tourism within Derbyshire and therefore it has been excluded from the analysis.

6.5.3 COMPARISON WITH OTHER APPROACHES

An alternative assessment of the value of tourism within Derbyshire is provided by STEAM data for the sub-region. In addition, ONS's Tourism Intelligence Unit has published a paper on the sub-regional value of tourism, setting out 2008 data at the county level. Figure 89 shows the estimates of tourism's value identified by each of these sources, compared to the estimates provided in this report.

Figure 89: Comparison of tourism estimates

	STEAM data (2011)	*ONS, TIU (2008)*	*Colliers, AMION analysis (2011)*
Visitor expenditure (direct - £m)	1,076.3	1,185.0	1,035.3
GVA (direct - £m)	-	460.0	401.9
Employment (direct)	21,752	40,800	14,208 – 31,525

7 NEXT STEPS

The aim following consultation with the client and key stakeholders on the findings of this stage 1 report will be to agree any significant edits to the stage 1 work and then to begin to apply the main findings to stage 2 of the work.

Stage 2 will identify more precisely the gaps in the tourism product and provision within the county and make recommendations on specific interventions and investments which could and should be made in order to address these gaps.

Accompanying our initial recommendations there will be a suggested monitoring and evaluation methodology which will serve as a tool to keep track of the success and impact of any future investments made into the visitor economy.

APPENDIX

1 CONSULTATIONS

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Frank Horsley, Head of Economic Regeneration, Derbyshire County Council

Paul Wilson, Director of Planning and Regeneration, Derbyshire Dales District Council

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Sarah Mcleod, CEO, Arkwright Society

Richard Tuffrey, Architect, High Peak Borough Council

Trevor Osborne, Chairman, The Osbourne Group

Ian Wall, General Manager, Creswell Crags

Kenny Murray, Centre Manager, East Midlands Designer Outlet

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David Eccles, Head of Economic Development and Regeneration, Bolsover/North East Derbyshire District Council

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Adam Buss, Director Derby Quad and Chair or Derby Tourism Cluster

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Amelia Horne, Owner, Jack Rabbits Kitchen/Discover Derby Ambassador

Martin Reid, Owner, The Derby Pyclet Company/Discover Derby Ambassador

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Keith Jeffrey, CEO, Derby Quad

Peter Ireson, Director, Derby Live

Stephen Munn, Director, Deda

Ann Wright, Festivities Group Manager, Derbyshire County Council/Derbyshire Arts

Ian Parkin, Director, Parkin Heritage and Tourism

Rupert Carr, Director, Birchall Properties

2 TOURISM INDUSTRIES (UNWTO DEFINITION)

Products	Industries
1. Accommodation services for visitors	1. Accommodation for visitors
2. Food and beverage serving services	2. Food and beverage serving activities
3. Railway passenger transport services	3. Railway passenger transport
4. Road passenger transport services	4. Road passenger transport
5. Water passenger transport servcies	5. Water passenger transport
6. Air passenger transport services	6. Air passenger transport
7. Transport equipment rental services	7. Transport equipment rental
8. Travel agencies and other reservation services	8. Travel agencies and other reservation services activities
9. Cultural services	9. Cultural activities
10. Sports and recreational services	10. Sports and recreational activities
11. Country-specific tourism characteristic goods	11. Retail trade of country-specific tourism characteristic goods
12. Country-specific tourism characteristic services	12. Other country-specific tourism characteristic activities

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