Stage 2 Report: Derbyshire Recommendations

PART OF D2N2 TOURISM IMPACT STUDY

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PREPARED BY COLLIERS INTERNATIONAL & AMION

PREPARED FOR THE D2N2 LEP

COLLIERS INTERNATIONAL PROPERTY CONSULTANTS LIMITED

Company registered in England and Wales no. 7996509
Registered office:
50 George St
London W1U 7DY

Tel: +44 20 7935 4499
www.colliers.com/uk

chrismelia@amion.co.uk

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Director	C Melia

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1 EXECUTIVE SUMMARY

1.1 INTRODUCTION

This is the second stage of a two stage study on behalf of the D2N2 LEP. It covers the Derbyshire and Peak District area.

The first stage provides a baseline assessment of the existing tourism offer. This report identifies the gaps in the current offer and makes recommendations about investment priorities which could be made to improve the experience across the area.

The recommendations should inform the Destination Management Plan for Visit Peak District and Derbyshire (VPD).

The recommendations fall into two categories; those which can be implemented by VPD and other public bodies, and those which need to be brought forward by private and third sector bodies. In the latter case, the purpose of this report is to recommend that suitable support is provided to these schemes when it is possible to do so.

1.2 CURRENT POSITION

The area is made up of a number of distinct destinations: Derby city, the Peak District National Park, the rest of Derbyshire and The National Forest. Within each of these there are a number of destination towns and villages.

The Derbyshire/ Peak District area has access to an extremely large day visit market, being located in one of the most populous areas of the UK. There is however relatively few overnight trips compared to other similar counties with national parks, such as Cumbria.

Spend levels from both day and staying visitors are also comparatively low.

The area has a good number of strengths including (inter alia): excellent access to the ‘gateway’ cities and towns; stately homes of national and international repute, including Chatsworth; some very popular market towns and villages; a growing reputation for cycling and some excellent cycling trails and multi-use sports arena.

There are also a number of weaknesses such as: poor public transport links within the National Park; a lack of hotel stock within the National Park, particularly branded hotels; some tired towns and villages that are nevertheless popular visitor hubs; variable quality of retail and food and drink.

The biggest weakness however is the inconsistent branding that is applied to the area and which adds to the lack of clarity amongst visitors about what and where the destination is.

1.3 PLANNED INVESTMENTS

There are committed developments of over £807m in the pipeline which will improve the overall visitor offer.

These developments include: the redevelopment of The Crescent in Buxton as a 5* spa hotel; a major new activity resort outside Chesterfield; a new train station at Ilkeston; the first phase of a major redevelopment of Cromford Mills; further investment in the cycling infrastructure in the National Park and a new velodrome/multi use sports arena in Derby City.

1.4 RECOMMENDATIONS

The following table summarises the recommended investments to be delivered by the public sector. They have been grouped by delivery partner and categorised as High, Medium or Low deliverability. The relative potential impact is also shown. In some cases High deliverability actions may only deliver a Low impact but are easy to achieve and therefore should be addressed relatively quickly. Other actions which are High potential impact are very challenging and may involve a number of factors which can't be controlled. For this reason, some have been classified as Low deliverability.

Action	***Category***	***Deliverability***	***Relative Impact***
Visit Peak District			
Public transport – rail improvements	Access	H	H
Public transport – Hopper bus	Access	M	M
Public transport – cycle friendly buses	Access	M	M
Public transport – integrated information	Access	L	L
Serviced accommodation development (of a very specific type of accommodation which would have a high impact)	Accommodation	H	H
Accommodation (variable quality)	Accommodation	H	M
Gateway cities & towns promotion	Destinations & Hubs	M	L
Destination development strategies	Destinations &	H	H

Action	Category	Deliverability	Relative Impact
– market towns	Hubs		
Visitor research	Destinations & Hubs	H	H
Expand Derbyshire food & drink programme	Food & Drink	M	L
Visitor information review	Visitor Services	H	M
Place branding and signage	Visitor Services	M	M
Brand	Other	H	H
Mobile & broadband connectivity	Other	L	L
Derby City Council			
Coach Parking	Access	L	L
Dedicated conference venue	Conferences & Exhibitions	M	H
New theatre, Derby	Entertainment & the Arts	M	M
Strategy for sustainability, cultural venues	Entertainment & the Arts	H	H
Outdoor events spaces	Festivals & Events	M	M
Pavement culture, Derby	Night time Economy	M	M
Promote purple flag	Night time Economy	L	L
Develop Derby City as cycling friendly	Activities and Sports	H	M
Retail improvements Derby	Retail	M	H
Derby Market Hall development	Food & Drink	M	M
Derbyshire County Council			
Buxton Museum re-development	Attractions	L	L
Cycle trails	Activities	H	M

Action	***Category***	***Deliverability***	***Relative Impact***
Cycle hubs	Activities	H	M
Development of trails along WHS	Activities	M	L
Archaeological Way	Activities	H	L
PDNPA			
Cycle friendly business support	Activities	H	M
Chesterfield BC			
Pavement Culture, Chesterfield	Night time Economy	M	M
Northern Gateway Development	Retail	H	H
Open Market	Chesterfield	H	M
High Peak Borough Council			
Glossop Town Hall Development	Conferences & Exhibitions	L	L
Retail improvements, Buxton	Retail	H	M
Indoor market development	Retail	M	M
South Derbyshire District Council			
Rosliston Forestry Centre	Attractions	M	M
Staveley Town Council			
Staveley Hall development	Attractions	H	M
Derbyshire Arts Partnership			
Co-ordinated festivals programme	Festivals and Events	M	M

The other recommended actions (aside from the above) are to be led by a range of non-public sector bodies or a combination of the two but should be supported by the public sector where appropriate.

2 INTRODUCTION

2.1 BACKGROUND

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. It provides a robust evidence base against which future development decisions can be made.

The second stage is based on the findings from the first stage. It identifies the gaps in the current offer and makes recommendations about how these could be filled and by which organisations.

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 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.

2.2 THIS REPORT

This is the second stage report for Derbyshire and The Peak District.

It should be read in conjunction with the first stage of the work.

It is important to recognise that that the potential actions included in this report fall into two different categories – those which can be initiated by Visit Peak District and Derbyshire or another public agency or organisation, and those which will need to be brought forward by a private sector or third sector organisation.

In the first instance, this report provides the basis for a strategy and action plan for the destination.

In the second instance, this report supports those initiatives which are seen as beneficial to the destination as a whole. It can be used as a basis to provide whatever assistance is required by the developer, whether at planning, funding or delivery stage.

To assist in this, the report also provides a ‘toolkit’ or a model for assessing the economic impact of any future developments and whether they will provide an acceptable return on investment.

This report includes:

- An assessment of the gaps in the current offer, based on the first stage of work;
- A summary of planned developments;
- Recommendations for actions which could address the gaps or market opportunities;
- A toolkit for assessing the likely impact of future developments.

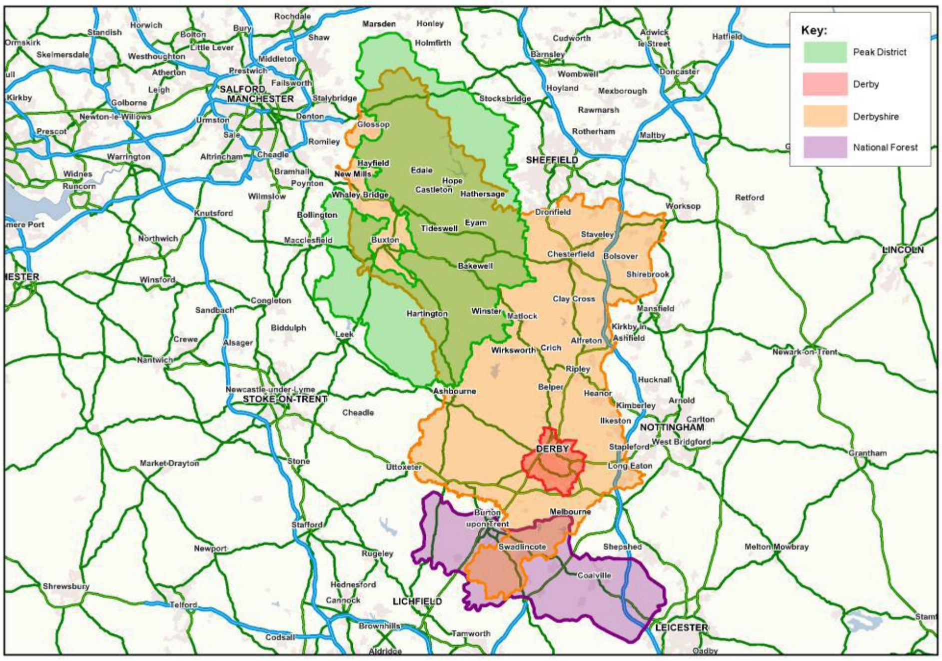
3 MARKET SUMMARY

3.1 AREA COVERED

The area covered in this report includes the city of Derby and the county of Derbyshire. It also includes the Peak District National Park which takes in parts of Cheshire, Staffordshire, South and West Yorkshire.

The area has very different characteristics in different parts and therefore in assessing gaps and opportunities the area has been subdivided into the following:

- Derby city
- Peak District National Park
- Derbyshire (outside the National Park)
- The National Forest



Source: Colliers International

3.2 MARKET

Stage 1 of the work gives a comprehensive overview of the market within the study area. The following table summarises the key statistics relating to the volume and value of visits in Derby City and Derbyshire;

Figure 1: Summary of Volume and Value of Tourism

	Volume of Visitors		*Spend (£)*	
Type	*Derby*	*Derbyshire*	*Derby*	*Derbyshire*
Residents (2011)	248,752	769,686	-	-
Domestic Day Visits (2011)	-	23,020,000	-	674,000,000
Domestic Staying Visits (2009-2011)	513,000	1,900,000	66,000,000	256,000,000
International Staying Visits (2012)	-	169,000	-	63,000,000
Totals	**761,752**	**25,858,686**	**66,000,000**	**993,000,000**

Source: Visit England, ONS, IPS

The area attracts a large number of domestic day visits from the significant resident catchment of over three quarters of a million people.

Figure 2: Comparison of visitor volumes and value with Cumbria

	Volume of Visitors		*Spend (£)*	
Type	*Derbyshire*	*Cumbria*	*Derbyshire*	*Cumbria*
Residents (2011	769,686	499,858	-	-
Domestic Day Visits (2 year averages)	24,100,000	17,100,000	645,840,000	602,140,000
Domestic Staying Visits (2009-11)	1,909,000	3,782,000	256,000,000	788,000,000
International Staying Visits (2012)	169,000	216,000	63,000,000	77,000,000
Totals	26,947,686	21,098,000	964,840,000	1,467,140,000

Souce: Visit England, ONS, IPS

Compared to Cumbria, for example, Derbyshire attracts more lower spending day visits. Average day visit spend in Derbyshire is around £27 per trip whilst day visitors to Cumbria spend £35 per trip. Cumbria also attracts more domestic staying and international visits. In Derbyshire the average spend of a person on a domestic staying trip is £134 whilst in Cumbria it is £208. The average spend per international visit is £373 in Derbyshire and £356 in Cumbria.

4 PRODUCT AUDIT SUMMARY

The stage one report includes an audit of the existing product offer in the area, grouped under twelve headings.

The following summarises the key strengths and weaknesses identified in the stage one report.

Strengths	***Weaknesses***
Access	
Excellent road access north and south, good road access within the National Park.	Fairly limited rail access within the National Park. Poor quality of service and rolling stock.
Excellent rail access to major cities and some of the larger towns.	Generally poor connectivity between different forms public transport.
Good access from two international airports. Manchester airport is the key one with East Midlands mainly outbound.	Limited connectivity by public transport from the airports into the National Park.
Very good cycle network within the National Park with further investment planned.	Poor connectivity between public transport and cycling.
	Bus network is not effectively publicised towards visitors but peak connections does however have a website and provide bus timetables to TICs
Attractions	
Good range of charged attractions within the National Park.	Cultural attractions are under threat from withdrawal of funding.
Some houses and stately homes of international and national repute.	World Heritage Site requires significant investment to meet expectations.
Derby has a reasonably good cultural offer as do Buxton and Chesterfield.	
A good range of smaller, niche attractions which are suitable for adult and family markets.	
Accommodation	

Strengths	***Weaknesses***
Good range of self-catering accommodation within the National Park.	Overall there is a lack of serviced accommodation within the National Park, particularly in the 4*-5* categories.
Good range of branded hotels in the gateway cities of Derby, Sheffield and Manchester with additional properties in towns e.g. Chesterfield and Knutsford.	Occupancy rates and achieved room rates in Derby and Sheffield are below the UK regional average which will limit further new investment. Rev Par however, is the main issue.
Good selection of camping and caravan sites with some unusual types of accommodation in some places.	The quality of independent accommodation is varied and many require investment.
Major investment in the accommodation stock in Buxton will begin shortly. The Crescent will be the only 5* hotel in the National Park area.	
Conferences & Exhibitions	
Good supply of meeting facilities in Derby and other gateway cities.	Other cities in the surrounding area have a much stronger conferencing offer than Derby e.g. Manchester, Nottingham and Leicester.
	Lack of residential conferencing of a larger scale within the National Park.
Destinations & Hubs	
Large and varied ring of cities around the National Park with a good urban offer (accommodation, food, bars, night time offer etc.).	Some towns are looking quite tired and in need of investment in the public realm and buildings e.g. Buxton, Bakewell.
Good mix of towns and villages around and within the National Park.	Opening hours of retail and some food outlets are varied and don't always match visitor demand.
Some major attractions and reservoirs also important visitor hubs with visitor centres and catering.	A lack of agreement on which towns and villages are true visitor hubs which affects the marketing messages given to visitors
	There is a lack of research on how

Strengths	***Weaknesses***
	visitors use destinations and hubs in the Peak District and how they move around the area
	Another issue is lack of visitor economy awareness of the smaller industry partners. Particularly if they are needed to be Ambassadors.
Arts & Entertainment/Events	
Overall there is a good mix of major ‘destination’ events and local ‘colour and character’ events.	Cultural venues in Derby are under threat from reduced funding.
Chatsworth has an international and national profile for its events programme and draws large numbers of visitors into the area for its arts and other events.	Some events are under threat because of public sector funding cuts.
A good range of local artists/producers and local gallery’s/arts centres.	Derby lacks a fit for purpose large scale venue which compares with those available in cities of a similar size.
	A lack of joined up thinking about events particularly between city and county
Nightlife	
The county has a particularly strong reputation for its real ale pubs and bars and microbreweries.	There is a lack of a pavement culture in Derby and Chesterfield and other bigger towns which stops there being a positive buzz in the evenings.
The food offer in many places is good and utilises local produce.	Some of the bigger towns are perceived as sleepy in the evenings.
Activities & Sports	
The National Park is developing a particular strength in cycling.	The additional facilities such as the trails will require on-going revenue to maintain them. This may prove difficult in the future.
The area has a good reputation for climbing, fishing and air sports.	Some of the cycling trails are not yet linked up to the towns and cities and so

Strengths	***Weaknesses***
	many visitors are accessing them by car, adding to the environmental damage to the National park.[1]
Generally there is a good mix of events which are accessible to a wide mix of users (i.e. not too extreme or elite).	Capacity at places like Ladybower reservoir and Hassop station is not adequate at busy times.
There are a number of operators and hire facilities serving the needs of active visitors and a good spread of accommodation which offers facilities for outdoor sports participants.	
There are a growing number of bigger sporting events which are raising the profile of the area for outdoor activities especially cycling and walking events.	
Retail	
The new Westfield Centre in Derby has been a significant improvement to the offer within the county.	The quality of the independent retail is variable especially in some of the bigger towns like Buxton and Bakewell.
Some other bigger towns have a varied mix of branded and independent retail.	Shops are often closed on Sundays, a key visitor day.
There are some unusual and interesting retail clusters for example at Cromford Mill and Chatsworth.	Derby University's proposed Retail Academy in Buxton requires funding.
The area offers a strength in factory shops/manufacturing e.g. Denby Pottery, Royal Crown Derby etc.	There are a number of long term voids in places like Derby where shops have closed down but landlords will not release the tenants from their contracts enabling new shops to move in.
The Cathedral Quarter BID area in Derby is a strong retail area with individual character	Many of the threats facing the retail sector in town centres nationally are also visible in Derbyshire
Food & Drink	
Chesterfield and Derby have a number of destination food shops.	The market in Derby could benefit from investment.

[1] This will be addressed to some extent by the DfT 2014/2015

Strengths	*Weaknesses*
Chatsworth is a major food destination and a number of pubs and hotels owned by the estate have an excellent reputation.	The promotion of pubs as a unique, high quality asset for Derbyshire could be improved.
Overall there is a good and varied mix of restaurants, cafes and specialist food shops.	
A good supply of high quality local produce – the Environmental Quality Mark award helps to give outstanding suppliers recognition	
Visitor Services & Other	
Introduction of the Peak Explorer app is a step which has been taken to move towards a more sustainable method of providing information	The area lacks a recognised brand and suffers from inconsistent signage.[2]
	TICs have been closing and are often not available on Sundays. There are few TIPs.

[2] Feedback has been noted that the DVMWHS branded signs are an improvement and have improved recognition and awareness of the World Heritage Site.

5 PLANNED DEVELOPMENTS

The following summarises developments for which planning permission has been granted and all or most of the required funding is in place.

The total known value of planned developments is around £807m.

Figure 3: Planned Investments

Name of Investment	*Location*	*Description*	*Proposed Completion*	*Status*	*Value(£m)*
		Access			
New Train Station	Ilkeston	Approved March 2015 opening of Coronation St, line to Nottingham but not to Derby. £4.5m investment from the new station fund from the Department of Transport. Total cost £6.5m with some funding from DCC and EBC. 2 Platforms, 150space car park.	2014	Submitting planning application	6.5
Hipper Canal Route Development	Chesterfield	Funded and will be done in 12-18 months. Will be a more integrated off road cycle network – will take people out into the PD straight from the train in Chesterfield.	2014/15	Underway	-
Midland Railway	Butterley	Looking to develop the site further and are applying for stage 1 HLF funds	-	Applying for funding with HLF	1.5

		Attractions			
Gateway Project	Derwent Valley Mills	Repair of Cromford Mills Building 17, a Grade I Listed building "at risk", and conversion to create a northern Gateway on the ground floor for visitors to the Derwent Valley Mills World Heritage Site (DVMWHS) and on the four upper floors a Creative Cluster of managed workspace units	Jul-14	Funding secured for first stage	4.5
Denby Pottery	Denby	Planning permission for re-development to include more retail units, adventure park, garden centre, 80 bed hotel etc in village style development which will be done in stages over the next 4 years – funded by Denby.	2017	Planning approved	
Old Hall Barn	Dronfield	15th century manor house set in 1.2 acres of landscaped park has received stage 1 HLF funding and is currently bidding for stage 2 to develop the house into a resource centre providing learning and information activities for heritage, natural history and the arts as well as a specilist centre for digitisation of archives and town and district visitor information centre	2015	Stage 1 HLF funding secured, stage 2 pending	1.2
Bolsover Castle	Bolsover	English Heritage are investing in the site heavily through providing additional car parking both onsite and in the town centre, the re-presentation of the little Castle in 2014/15 and the introduction of a playground at the castle	2014	Funding secured	1.5
		Accommodation			
Peak Resort	Unstone, Chesterfield	£300m holiday park development on reclaimed opencast mine land to include; 212 apart/hotel, 250 lodges, 26 bed golf hotel, a range of outdoor activities	2016	Planning approved and funding secured	300
Buxton Crescent Hotel & Spa	Buxton	Redeveloped into a 5* luxury 79 bed hotel and spa in partnership with The Trevor Osborne Property Group, CP Holdings Limited, Danubius Hotels, High Peak Borough Council and Derbyshire County Council with major funding from the Heritage Lottery Fund. Interpretation centre and retail also included in the scheme	2015	Underway/funding gap	32.4
Refurbishment of The George Hotel	Buxton	Restoration of the hotel	-	Subject to completion of the Crescent	-
Marquis of Granby	Bamford	The Marquis of Granby will be a high class boutique hotel with 121 bedrooms, a functions venue, conferencing and meeting rooms, spa, restaurant and bar	-	Stalled due to funding difficulties	-
Derwent Arms	Bamford	Conversion of a former pub into a boutique hotel	-	Underway	-
Tetron Point Golf Course/Hotel Development	Swadlincote	Driving range opens early 2014, 18 hole golf course soon afterwards, operator sought for hotel and scoape for further development beyond this	2014	Underway	20

		Entertainment & The Arts			
Network of arts centres	Derbyshire	A lack of a trail for arts enthusiasts	-	Current Arts Council bid, which will create a short break offer centred around arts	-
Assembly Rooms	Derby	New roof currenty being constructed	2013	Underway	50
Chesterfield Theatres	Chesterfield	£495K of arts council funding secured and £255K from Chesterfield BC to develop facilities at The Winding Wheel and Pomegranate Theatres in 2014	2014	Funding secured	0.75
		Festivals & Events			
L Eroica Cycling Festival	Various	Vintage cycling festival	2014	Funding required	-
		Activities & Sports			
Destination Pedal Peak District	Various	£7.5m from department of tranport and public funding to complete links between Tissington/High Peak Trail and Buxton, and Matlock and Bakewell. A new cycle link between Hathersage and Castleton, a new Y shaped link between Stoke-On-Trent and the Peak District, to link Sheffield and Barnsley to the Transpennine trail (Little John Trail). Completion of Monsal Trail.		Funding secured	7.5
Longdendale Trail	Hadfield	working on cycle access	-	Unknown	-
Sett Valley Trail	New Mills	working on cycle access	-	Unknown	-
Velodrome/MUSA	Derby	27.5m stadium at Pride Park, 250-metre cycling track, a 12-court sports hall, a gym, multi-function rooms, a spinning room and a café	2014	Underway	27.5
Aquatics centre	Derby	£50m pool development	2015	Underway	50
The National Forest Way	Swadlincote	75 mile waymarked long distance trail traversing the Forest launches 2014	2014	Unknown	
Cycle Hub	Derby	150 (check) cycle parking spaces, physio, repair centre with shop plus café	Summer 2014	Funding gap	0.29

		Retail			
Expansion of East Midlands Designer Outlet	South Normanton	Want to double park in next 3 years - 100k sq ft F&B and higher end brands, conference facilities on first floor	-	Planned	-
Chesterfield Waterside	Chestefield	£300m scheme, houses and apartments, offices, shops, cafes, bars around canal basin, open spaces. Outline planning permission has been granted and funding secured for the infrastructure for the 1st phase.	10 years	Construction to start end 2013	300
		Other			
Derby Magistrates Court	Derby	The Grade II listed building will be transformed into serviced office accomodation, a cafe and new home for the city's local studies library	2014	Unknown	3
Bolsover Town Public Realm and Infrastructure	Bolsover	ERDF funding now secured to improve the public realm and street furniture to make the town more attractive to visitors who come to the town to visit Bolsover castle	2015	Funding secured	0.75
Total known investment					**807.39**

6 RECOMMENDATIONS

6.1 INTRODUCTION

The following recommendations are based on the current market assessment, product audit and stakeholder consultations.

In some cases, the required actions can be initiated by Visit Peak District and Derbyshire or other public bodies. In other cases, the action will need to be initiated by a private sector or third sector organisation. The role of the public sector in these cases will be to provide funding (where available), to assess planning applications or to provide other expertise and guidance to the project.

Although it is not possible at this stage to assess the likely cost and economic impact of each recommendation, an assessment has been made of the relative impact of each. High impact investments therefore are likely to deliver a high impact relative to the other recommendations.

6.2 ACCESS

Although access to and from the gateway cities and towns by road, rail and air is generally very good, there are weaknesses in all forms of public transport within the National Park. Issues identified include: rail services are infrequent and the rolling stock used is very old; bus services are infrequent in many areas; connectivity between all forms of public transport is poor; information is not provided across different forms of transport and is therefore incomplete and there is a failure to provide a frequent link between the hubs and the attractions.

A visitor survey conducted by the Peak District National Park Authority[3] suggests that at present around 85% of all visitors to the National Park currently travel by car, which at peak times in particular impacts negatively on the visitor experience as well as the environment. Unless these weaknesses can be addressed, it is unlikely that any significant modal shift can be achieved.

RAIL IMPROVEMENTS

Northern Rail run the two rail services which operate within the National Park, the Manchester to Buxton line and the stopping service between Manchester and Sheffield. Both of these services are slow and infrequent and the rolling stock used is usually very old, noisy and uncomfortable. Encouraging Northern Rail to invest in the services is clearly not going to be quick although it will be important to ensure that representatives from Northern Rail become part of the Peak District Destination Management Partnership so that they can work with other partners to exploit the opportunities presented by visitors.

[3] Peak District National park Authority Travel Survey 2012

An initial meeting should be arranged involving Northern Rail, VPD, the Peak District National Park Authority and Derbyshire County Council's Public Transport Unit to understand the priorities and opportunities from each organisation. Regular dialogue should be established for the future.

The Midland mainline service which also connects to the Peak District, Chesterfield, Derby and Sheffield is recognised as another rail link with potential for improvement but it is recommended that there is a focus on the delivery of the Northern Rail lines in the first instance because the potential gains to be made from improving these services will have the biggest impact.

Lead delivery partner: Visit Peak District (VPD)/DCC

Deliverability: High

Impact: High

BUS SERVICE IMPROVEMENTS

Improving the frequency of bus services within the National Park is unlikely to deliver any significant benefit to visitors or to prove financially viable. There are however some good examples of specific bus services that have been tailored to meet the specific needs of visitors.

NATIONAL FOREST HOPPER BUS – DERBYSHIRE

The Hopper Bus links major attractions in South Derbyshire with key towns.

Hourly services run from Leicester throughout the region.

The service is used by residents as well as tourists which helps with the year round viability of the service.

Bus operator Arriva Midlands teamed up with Leicestershire County Council, the National Forest Company, North West Leicestershire District Council and South Derbyshire District Council to launch reduced fares, vouchers for attractions and activity packs for children.

In the first instance, potential opportunities within the Peak District would need to be discussed with current bus operators in the area as well as with the National Park Authority which has recently conducted a survey into transport use within the Park.

Peak Connections provide services to and from many of the major tourist hubs but a service which is more specifically marketed to visitors and stops at individual attractions as well as key towns could be developed.

Some stakeholders feel that a Hopper Bus would be particularly beneficial if run along the world heritage site hubs.

Lead delivery partner: Visit Peak District (VPD)

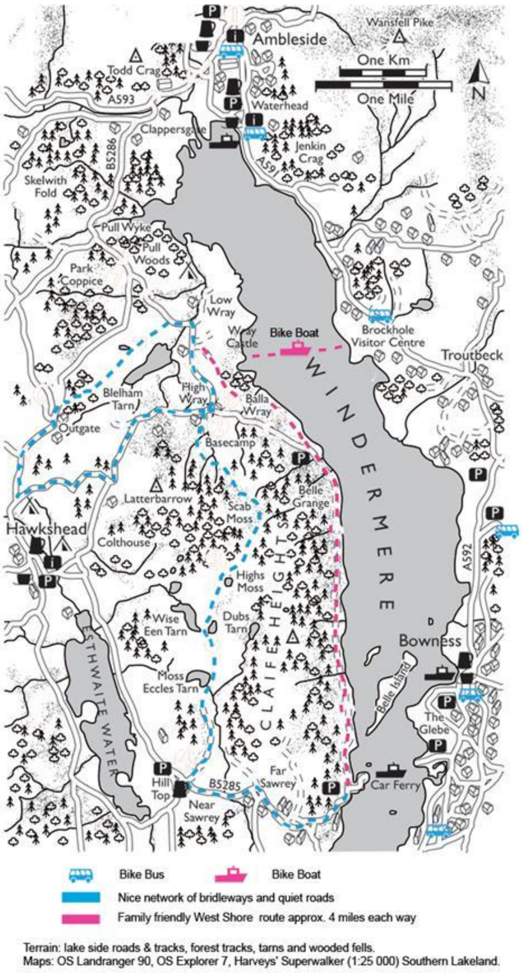
Deliverability: Medium

Impact: Medium

INTEGRATED TRANSPORT

Lack of integration between different modes of transport is an issue in the rural areas of Derbyshire. In particular, the difficulties of carrying bikes on public transport to and within the National Park is likely to be a barrier to growth in cycling both as a mode of transport and a leisure activity.

BIKE BUS SERVICE - LAKE DISTRICT



Many buses operating in the Lake District are kitted out to be able to carry bikes on racks or on board.

The 800 Bike Bus however, which runs between a number of major tourist hubs, has been specifically designed to meet cyclists needs and can carry up to 12 bikes on an on board cycle rack. The service runs at weekends and bank holidays between May-July and daily between July-Sept. Information about rides which can be taken from the Bike Bus stops has been produced.

Windermere Cruises also run a bike boat service between Brockhole, the Lake District Visitor Centre and Wray Jetty on the West Shore of Lake Windermere.

Opportunities for introducing cycle friendly bus routes should be discussed with the current operators and the PDNPA.

Lead delivery partner: Visit Peak District (VPD)

Deliverability: Medium

Impact: Medium

INTEGRATED TRANSPORT INFORMATION

Visitors would benefit from timetable information which links different modes of public transport throughout the area.

A consolidation website would be needed which draws down information from different operators. This would need to be agreed with Northern Rail and the bus operators. This service is available to an extent via travellineeastmidlands.co.uk but the site is not marketed to tourists. This could be achieved by wrapping the site with branded information and integrating links to the VP site

Other initiatives which would encourage use include a free downloadable app with integrated timetable information.

Lead delivery partner: Visit Peak District (VPD)

Deliverability: Low

Impact: Low

OTHER OPPORTUNITIES

The Friends of Cromford Canal have been investigating options to reopen the Butterly canal tunnel which has recently been designated as a Scheduled Ancient Monument. The tunnel forms part of a potential 'transport lovers cluster' which includes Peak Rail at Matlock and Crich Transport Museum. Significant levels of funding would be required.

Lead delivery partner: Friends of Cromford Canal

Deliverability: Low

Impact: Low

Designated coach parking is needed in Derby City and in towns across Derbyshire including Belper amongst others which is part of the World Heritage Site.

Lead delivery partner: Derby City Council/DCC

Deliverability: Low

Impact: Low

6.3 ATTRACTIONS

Visitor attractions are a very important part of the visitor offer in most areas. Some attractions, like Chatsworth, are destinations in their own right, playing a significant role in drawing visitors into the region. Most attractions however are part of the overall experience and are seen by visitors as one of a number of features or attributes which make the area appealing.

With the exception of stately homes and theme parks, many visitor attractions are run by charitable trusts or local authorities on a not-for-profit basis. Indeed most cultural and heritage attractions require on-going revenue support from the public purse in order to remain viable.

For this reason, it is very rare that a new visitor attraction is developed. When it does happen, it is usually a small scale operation run largely by volunteers. The exceptions are where an existing museum or organisation develops a new facility, or where a company decides to develop a 'showcase' for a particular brand.

Overall the area has a large range of attractions of all sorts. The Peak District National Park has a particular strength in stately homes but also offers a good mix which includes heritage railways, wildlife parks, visitor centres, galleries and small museums. Elsewhere in Derby and Derbyshire there is also a wide range which includes theme parks in Matlock Bath, Creswell Crags, parks, gardens, museums, arts centres and the mills which form part of the Derwent Valley Mills World Heritage Site.

The opportunities which have been identified as offering potential for development in most cases involve existing attractions or sites which could play a more significant part in the visitor offer of the area.

In most cases, any action required will be led by the operator. The assistance required is generally support for funding applications which will be brought forward when suitable opportunities arise.

DERBY SILK MILL

The Silk Mill in Derby is the site of the world's first factory. It is at the southern end of the Derwent Valley Mills World Heritage Site.

Between 1974 and 2011 the mill was open to visitors as Derby's Industrial Museum. It closed in 2011 when Derby Museums, the Trust which runs the Silk Mill, the Derby Museum and Gallery and Pickford's House, was facing funding cuts.

The Trust is now planning to reopen the Mill and is inviting volunteers to take part in a programme which will design and fit out the ground floor of the building. Plans for the other floors are yet to be developed and finalised.

The Trust has been seeking funding from a range of grant giving bodies including the Heritage Lottery Fund. Given the vast scale of the building however, significant amounts of money will be necessary to create sustainable uses throughout.

Given the historical significance of the building, as well as its anchor location at one end of the World Heritage Site, it is agreed that any suitable funding applications should be viewed favourably. The overall ambition is to create a high quality attraction in the city.

Lead delivery partner: Derby Museums

Deliverability: High

Impact: Medium

BUGSWORTH BASIN

The Bugsworth Canal Basin is at the head of the Peak Forest Canal and on the edge of the National Park. It is a Scheduled Ancient Monument and is considered to be a site of particular significance in the country's industrial heritage. It was restored over four decades by teams of volunteers and was formally opened in 2005.

It is owned by the Canal and River Trust although the Inland Waterways Protection Society (IWPS) has a 50 year lease to restore, manage and operate the basin.

The basin is currently used by people on canal boats and is a stopping point for walkers using the canal tow path. The experience however is limited to a small amount of outdoor interpretation about the basin's history and a nearby pub, The Navigation Inn.

Given the strategic location of the site as well as the significance of its heritage, it is felt that the area should offer better visitor facilities including potentially a visitor centre and café and visitor parking.

This opportunity would need to be driven by the Canal and River Trust potentially with the support of the IWPS. Initial discussions are required to understand the owner's intentions for the site.

Lead delivery partner: Canal & River Trust

Deliverability: Medium

Impact: Medium

ROSLISTON FORESTRY CENTRE

The Rosliston Forestry Centre was the first visitor centre to be created within The National Forest and is owned jointly by South Derbyshire District Council and Forest Enterprise (part of the Forestry Commission).

The site provides a range of activities and services including holiday accommodation in forest lodges, an outdoor arena, cycle hire, cycle and walking trails, fishing, a children's play area, activity programmes and a café. The centre is also available for private hire and for weddings.

The National Forest has ambitions to increase its profile as visitor destination. The majority of users are local people from Derbyshire and Leicestershire although the holiday accommodation at Rosliston is used by both by visitors from the West Midlands as well as by people from elsewhere in the UK.

The site has been developed incrementally since it first opened and now generates a small annual surplus. The owners have plans to extend the corporate and private hire facilities in order to improve the long term sustainability of the site.

Lead delivery partner: South Derbyshire District Council

Priority: Medium

Impact: Medium

CROMFORD MILLS

The Cromford Mills complex was built in the 1700s by Sir Richard Arkwight and provides an important insight into the history and significance of textile manufacture. The entire complex which comprises 10 former mill buildings is Grade 1 listed.

The Mills are at the northern end of the Derwent Valley Mills World Heritage Site and along with Silk Mill in Derby (which is currently closed), they offer visitor access to the historic mill buildings.

The complex is owned and managed by the Arkwright Society.

The current offer includes an interpretive exhibition in Building 1, tours around the site and village, interpretation around the site, events, an education programme, some independent retail and a café. Parts of the site are available for private hire for meetings and events.

A £48m masterplan has been developed for the complex which aims to create a sustainable future for the buildings. It will be delivered in stages.

The first phase will provide a World Heritage Site gateway centre and managed workspaces in Building 17. The second part will introduce a new 80 bed Youth Hostel which will be developed in conjunction with the YHA.

The second phase will expand the existing café, convert the Mill Managers House into self-catering accommodation and create a new archive.

The final phase will create a new heritage centre telling the history of the site and restore the aqueduct.

To date funding has been secured from a range of sources including the Heritage Lottery Fund and The Monument Trust and work has begun on the first phase with a scheduled opening date of autumn 2014. Fundraising for the subsequent stages will be on-going.

Lead delivery partner: The Arkwright Society

Deliverability: High

Impact: High

TRANSHIPMENT WAREHOUSE, WHALEY BRIDGE

The Transhipment Warehouse is a disused building, owned by the Canal & River trust, which sits on the Canal Basin at Whaley Bridge. The canal runs through the ground floor of the building.

The Grade II* listed building has particular heritage significance because of the role that it played in linking road and water transport. It is also a local landmark.

Finding sustainable uses for the building is challenging for many reasons including its size and the fact that it has water running through it. Over the last 10 years however there have been a number of studies looking into potential future uses although recently the project has been gathering momentum, fuelled in part by the impact that the BBCs relocation to Salford has had on the area.

Potential uses include introducing a café, events and arts space, office accommodation and a new community building alongside.

Lead delivery partner: Canal & River Trust

Deliverability: Medium

Impact: Medium

DERBY ARM PROJECT

The Derby and Sandiacre Canal Trust is undertaking a regeneration project to reopen the 12.5 mile waterway of the Derby Canal over 20 years. Outline planning permission was granted for the canal line in 2011.

The scheme includes plans for a 180ft boat lift near Pride Park stadium to move boats from the canal to the River Derwent. The Arm is similar to the Falkirk Wheel in Scotland which lifts boats between two canals.

The cost of the Arm is estimated at around £10m - £15m based on costs for the Falkirk Wheel.

Lead delivery partner: Derby and Sandiacre Canal Trust

Deliverability: Low

Impact: Medium

STAVELEY HALL

Staveley Hall is a Grade II listed property, owned by Staveley Town Council. The Hall, which was created as a grand country house, was designed by John Smythson who also designed Bolsover castle. At one time it was owned by the Cavendish family of Chatsworth.

Only part of the original house now remains and although it is in a poor state of repair it houses the Town Council's offices as well as the offices for a number of charitable organisations. The stable block provides further office space as well as a self-contained flat. The historic gardens are now largely overgrown although parts of the grounds are now occupied by a garden centre.

A £4.5m development plan for the Hall will restore the building and gardens and create a centre for heritage, arts and community uses. It will include an interpretation centre and café as well as office space and meeting rooms for private hire and weddings. The stables will be refurbished and re-let as offices. A charitable trust has been set up to manage the fundraising and development work although it is intended that once the work is completed, the Hall will be run by a community trust.

To date £3m has been secured from various sources including the Heritage Lottery Fund. A further £1.5m is needed.

Lead delivery partner: Staveley Town Council

Deliverability: High

Impact: Medium

OTHER OPPORTUNITIES

The Rolls Royce Heritage Trust manages collections in Derby and Hucknall which are available to review by appointment. The Trust was started and consists of ex and current employees of Rolls Royce. The collection is used mainly for learning purposes by schools, special interest groups and employees of Rolls Royce. If the Trust (or any other party) brings forward a scheme for a permanent Rolls Royce museum within Derby this would be viewed as a valuable visitor draw for the city. Initial discussions with the Trust however suggests that they (and Rolls Royce) would be keen to support alternative forms of interpretation around the themes of industrial heritage as they feel there are more creative and sustainable ways of exploring the theme.

Lead delivery partner: The Rolls Royce Heritage Trust

Deliverability: Low

Impact: Low

The Mercia Marina is located on the Trent and Mersey Canal. In addition to berthing facilities it offers a tea room, chandlers, boat hire and boat trips. The site is already considered a destination for visitors, mainly those travelling by boat. Given its location and existing facilities, it has the potential to be developed into a more substantial visitor destination with additional accommodation, retail and restaurants. Planning applications for developments which enhance the visitor experience could be supported.

Lead delivery partner: Mercia Marina

Deliverability: Low

Impact: Low

The painter Joseph Wright from Derby has a significant profile internationally and Derby Museums are developing plans to tour some of his works from their collection around the world and to develop international links. This would create opportunities to raise the city's profile. This would be more likely to be successful if the new visitors who are attracted back to Derby city are able to visit a state of the art facility/museum when they return.

Lead delivery partner: Derby Museums

Deliverability: Medium

Impact: Low

The Buxton Museum and Art Gallery is a small free museum in the centre of Buxton. The developer behind The Crescent Hotel and Spa believes that the museum could be redeveloped as part of the regeneration of the town. There will be a small heritage centre within The Crescent and links could be made between the two.

Lead delivery partner: Derbyshire County Council/High Peak Borough Council

Deliverability: Low

Impact: Low

Torr Vale Mill in New Mills is a Grade II listed former cotton mill on the bank of the River Goyt. The large complex of buildings sits alongside the Millennium Walkway and is visible from the Hope Valley railway line.

A preservation trust is currently trying to find sustainable uses for the building which could include visitor related uses.

Belper North Mill is also at a similar stage of development and the trust is trying to find suitable funding to preserve and develop the building for visitor related uses.

Lead delivery partner: Preservation Trusts

Deliverability: Medium

Impact: Low

6.4 ACCOMMODATION

As might be expected, there are different gaps and opportunities in the accommodation stock in the National Park compared to the cities and other areas of the county.

Derby, Sheffield and Manchester all offer a good range of branded hotels as do some of the larger towns such as Chesterfield and Knutsford.

Derby hotels however achieve low occupancy and low average room rates compared to most other regional cities. Actions to address this are included in the Conference & Exhibitions and Festivals & Events sections. Availability at weekends creates an opportunity for good value leisure breaks however.

Figure 4: Core Cities Hotel Statistics

2013	*Derby*	*Nottingham*	*Leicester*	*Sheffield*	*Birmingham*	*Liverpool*
Occupancy	68%	67%	67%	72%	68%	70%
Average Room Rate	£49	£53	£54	£54	£63	£62
RevPar	£34	£35	£36	£38	£43	£43

2013	*Leeds*	*Newcastle*	*Bristol*	*Exeter*	*York*	*Manchester*
Occupancy	73%	72%	73%	77%	78%	78%
Average Room Rate	£60	£62	£64	£62	£66	£71
RevPar	£44	£45	£47	£47	£52	£55

Source: STR Global

The National Park has a reasonably large supply of self- catering properties but very little serviced accommodation and the size of the accommodation stock in the National Park will always be limited. Overall, compared to most other comparable counties, Derbyshire has far fewer properties in all categories but particularly serviced accommodation.

SERVICED ACCOMMODATION DEVELOPMENT

Many destinations outside of the major cities have taken a proactive to approach to attracting hotel development. It is particularly useful in rural destinations which are often off the radar for hotel chains when considering expansion.

Accommodation strategies provide a detailed assessment of the existing supply including occupancy levels and room rates achieved, as well as an analysis of likely demand from tourist and business audiences. A list of potential sites is then identified, usually including opportunities for new development as well as expansion/ refurbishment options for existing properties. The information is presented as a prospectus. A list of potential developers and operators is then drawn up for each site and approaches are made to the most viable prospects. (Examples can be found for Lincolnshire and the Isle of Wight amongst others).

Based on the evidence above, it is likely that an accommodation strategy for the Peak District would be very beneficial.

Lead delivery partner: VPD

Deliverability: High

Impact: High

ACCOMMODATION QUALITY

The strategy could also address the variable quality which is found in the existing stock and make recommendations for improvements. Initiatives which have proved successful elsewhere have included funding schemes to incentivise investment in properties and training initiatives.

Lead delivery partner: VPD

Deliverability: High

Impact: Medium

6.5 CONFERENCES & EXHIBITIONS

A very wide range of venues are used to house conferences and exhibitions. At one end of the spectrum there are dedicated purpose built conference centres (such as the IECC in Liverpool), at the other end there are relatively small flat floor venues used primarily for local exhibitions and functions. In between there are venues offering different combinations of rooms and seating options.

DEDICATED CONFERENCE VENUE, DERBY

Derby, unlike many other regional cities, does not currently have a dedicated conference centre although there are a number of commercial facilities in hotels as well as public venues such as the Assembly Rooms which are used for a range of events.

There are a number of factors which together determine the likely demand for dedicated conference centre:

- Size of the resident population
- Size and profile of the university (or universities)
- The local business base – size and sectors
- Competition – from neighbouring cities, from university venues etc.
- Availability of suitable hotel accommodation

Derby has a number of factors which suggest that there might be demand for conferencing facilities. There is a large resident population, a university with over 13,000 students, a strong business sector/business tourism potential and a good range of available hotel beds. Negatively however, a number of neighbouring cities such as Nottingham and Leicester already offer good facilities.

A feasibility study would be required to assess the demand, considering in particular demand from the University for Association conferences and from the major businesses.

It is important to note that most dedicated conference centres require on-going revenue support and this would need to be considered along with the potential benefits to the city when making an assessment for the city. Any study should also consider the need to better promote the smaller scale venues which already exist perhaps through the existing service 'The Conference Works'. Derby would also benefit from enhanced sales activity, especially in order to compete with other destinations.

Lead delivery partner: Derby City Council

Deliverability: Medium

Impact: High

GLOSSOP TOWN HALL

Glossop Town Hall is one of a number of heritage venues in Glossop for which the Town Council and High Peak Borough Council are trying to identify sustainable uses.

The Town Hall has been identified as potentially providing a multi-purpose exhibitions and events space which would serve both community and tourism uses.

Lead delivery partner: High Peak Borough Council

Deliverability: Low

Impact: Low

6.6 DESTINATIONS & HUBS

The first stage report identified that there are three different types of visitor hubs in this area: gateway cities and towns; destination cities, towns and villages; other hubs.

Gateway cities and towns are the major urban areas which are used as a base by visitors to the National Park and which provide accommodation and other services. They include cities such as Sheffield, Derby and Manchester and towns like Knutsford, Chesterfield and Belper. These places are of course also visitor destinations in their own right as well as gateways.

Destination cities, towns and villages are places that visitors head for to eat and drink, shop, stroll and possibly stay. They include Derby, Chesterfield, Bakewell, Buxton and Matlock Bath amongst others.

Other visitor hubs are the major visitor centres and destinations such as Carsington Water and Chatsworth Park.

In terms of investment priorities, all of these destinations and gateways are important in different ways and therefore warrant on going investment and development.

GATEWAY DESTINATIONS

The key priorities in terms of the gateway destinations involve connectivity with the Peak District National Park (although each of course will need to remain vibrant and appealing in its own right). Public transport and access priorities linking the gateways with National Park are indicated above.

In addition, there is a need to continue to ensure that there is cross promotion between the gateway accommodation providers and gateway destinations and the Peak District. Specific joint marketing campaigns could be developed to exploit the shared opportunity.

Lead delivery partner: VPD

Deliverability: Medium

Impact: Low

DESTINATION CITIES, TOWNS & VILLAGES – STRATEGIES & SME SUPPORT PROGRAMME

There are many towns and villages which form an important part of the visitor experience. There are however a relatively small number of particularly significant destinations which receive large numbers of visitors and are a very key part of the visitor offer. These are:

- Ashbourne
- Bakewell
- Buxton
- Castleton
- Holmfirth
- Matlock
- Matlock Bath

Some of these places already have Destination Strategies which set out the development priorities and action plans including Buxton and Holmfirth. Support should be given to delivering these strategies where appropriate.

Destination Strategies sit alongside economic development and visitor economy strategies and focus specifically on physical developments and place making. The other destinations in this list (Ashbourne, Bakewell, Castleton, Matlock and Matlock Bath) would all benefit from the development of individual destination strategies since the priorities and opportunities are different in case. Given the importance of the cycling strategy in the National Park these hubs should be encouraged to be cycling friendly as well as acting as general visitor hubs.

Derby already has a number of relevant strategies including a Visitor Economy Strategy, an Economic Strategy, a Retail Strategy and a Cultural Strategy and each of these plays an important role in the development of the city. There would be value however in trying to strengthen the destination aspects of the Tourism Cluster Group Action Plan.

In most destinations, the delivery of the destination strategy is dependent on the actions of businesses as well as Local Authorities. SME grants are usually beneficial in encouraging small businesses such as B&Bs, retailers and restaurant owners to invest in their premises. An SME support programme could be developed to assist destinations in the implementation of their strategies.

Lead delivery partners: Local Authorities/ VPD

Deliverability: High

Impact: High

RESEARCH

Although data exists about the volume and value of tourism in the region, there has been very little research undertaken to understand how visitors 'use' the region. The research could provide a valuable insight into how visitors use destinations and gateways and the different types of visitors which favour different destinations within the county and could further support future investment decisions.

Research could be undertaken in conjunction with Derby University's Buxton campus.

Lead delivery partner: VPD/ Visit England/ University

Deliverability: High

Impact: High

6.7 ENTERTAINMENT & THE ARTS

Entertainment and the arts play an important role in both the daytime and evening economies across the county and whilst it is rarely a motivator of visits in its own right to most destinations, it nevertheless forms an important part of the appeal of the destination.[4]

Derby has a strong cultural events programme including notably Feste and Format festivals and a number of cultural venues. Elsewhere across the county there are a number of theatres, arts centres and cinemas which are used by both locals and visitors to the area.

NEW THEATRE, DERBY

In 2007, a feasibility study looking into the provision of performance venues in Derby, concluded that there was demand in the city for a new 1,500 seat venue with fly tower and full theatre facilities. The project has not been progressed in the recent economic climate but remains a viable project for the future. A realistic commercial business plan will be required and the impact on the Assembly Rooms will need to be considered.

There are already 3 performance venues in Derby however, there is debate over whether these are fit for purpose in terms of meeting audience's modern expectations and therefore, the aspiration for a new theatre should be explored.

Lead delivery partner: Derby City Council

Deliverability: Medium

Impact: Medium

STRATEGY FOR SUSTAINABILITY, CULTURAL VENUES DERBY

All cultural venues are coming under threat from the reduction or withdrawal of revenue funding. This situation is unlikely to improve in the foreseeable future. In Derby, the cultural venues are an important part of the destination experience and it is vital that a sustainable strategy is developed for the venues under threat. The strategy should consider all options such as mergers and commercialisation of assets.

Lead delivery partner: Derby City Council

Deliverability: High

Impact: High

[4] There may be some very specific cases where entertainments and arts are a motivator of visits – i.e. Buxton Festival because of its high profile

6.8 FESTIVALS & EVENTS

There are a large number of cultural and sporting events and festivals which take place across the county throughout the year. Some of these such as the major events at Chatsworth and the Buxton Festival act as attractors to the area. The majority however provide colour and animation to destinations and enhance the experience for visitors.

Events can be financially risky and in the current economic climate it is difficult to secure the necessary funds to develop or attract new big events.

The priority in Derbyshire should be to improve co-ordination and to ensure that the destination is gaining maximum value from its events programme. The festivities group could play a part in this along with Visit Peak District. In terms of promotion more could be done to encourage organisers to put events on Visit Peak District's DMS database.

CO-ORDINATED FESTIVALS & EVENTS PROGRAMME

A co-ordinated events programme would help to ensure that festivals and events are not held on the same dates and that destinations do not compete against each other in bidding for events. Both cultural events and sporting events should be considered including the major walking festivals which take place in the area.

Derbyshire Arts Partnership the logical organisation to provide this service although there would need to be agreement amongst Local Authorities and major organisations to supply information.

Funding would also be needed to support the role.

Lead delivery partner: Derbyshire Arts Partnership (who run the festivities group)

Deliverability: Medium

Impact: Medium

OUTDOOR EVENTS SPACES, DERBY

Outdoor entertainment adds vibrancy to the destination throughout the year. At present there are limited spaces in the centre of Derby and in many places in wider Derbyshire which are suitable for events, particularly large scale events. In Derby city the market place should be the heart of the city but can act a large empty space that deters rather than attracts footfall. Consideration could be given to improving the space.

Other suitable sites should be identified and a straightforward system developed which would allow appropriate event organisers to apply for permission to use them.

If a suitable space could be identified for larger events, infrastructure such as power and water should be installed to improve the viability of use.

Lead delivery partner: Derby City Council/Derbyshire County Council

Deliverability: Medium

Impact: Medium

6.9 NIGHT-TIME ECONOMY

PAVEMENT CULTURE & PURPLE FLAG STATUS, DERBY & CHESTERFIELD

Many European cities actively encourage a ‘pavement’ culture where restaurants and bars provide seating out in the streets to add vibrancy to the evening economy.

GOTHENBURG’S PAVEMENT CULTURE

Most northern European cities also do not have perfect climates but offer many attractive places to eat and drink outside. It is one of the most important factors in making places like Gothenburg trendy destinations. Many restaurants and bars provide tables and chairs outside and provide blankets on the seats when the evenings are particularly cold. As a result, destinations have a vibrancy and life throughout the day and into the evening.

Derby has a good range of restaurants and pubs and there are a number of areas which would benefit from more outdoor activity.

The evening economy is included in the VES action plan and can be further emphasised through this.

The city should also maximise the value of its Purple Flag safe city designation through its promotional activity and also try to promote use of the Destination branding/ logo as well. Partner organisations in the city should be encouraged to use the logo on their marketing.

Chesterfield also has a good range of award winning restaurants, 2 main theatres and cinemas and the city should also aim to develop the evening economy in accordance with the Chesterfield Masterplan.

Lead delivery partner: Derby City Council/Chesterfield BC

Deliverability: Medium

Impact: Medium

6.10 ACTIVITIES & SPORTS

CYCLE TRAILS/HUBS/CYCLING FRIENDLY BUSINESSES

The network of cycle trails and routes continues to grow, although a number of key ‘missing links’ have been identified which are required to connect the most popular trails to major visitor hubs. The development of cycle trails, it should be noted; benefit not just cyclists but walkers and others who use these multi-purpose trails. With the creation of the Multi Use Sports Arena, Cycle Derby, events and the cycle hub, cycling will become increasingly relevant to Derby, will attract regional events and further enhance the wider regions strengths as a cycling destination.

The extension of the High Peak Trail into Buxton has been identified as a particular priority by the PDNPA and now has approval and funding. However, there are two other routes which were not included in the recent funding bid to the department of transport but are still important. These are;

1) The link from Wyedale to Buxton, completing the link between the Monsal trail and Buxton

2) The completion of the loop to Cromford and the world heritage site.[5]

The Monsal Trail is one of the busiest routes and the café and cycle hire facility at Hassop has been particularly successful (run and owned by a private sector operator). At peak times the facilities struggle to cope with demand. The former station buildings at Millers Dale have been identified as providing a potential second hub along the route and this should be investigated as a development opportunity. Similarly the facilities at Parsley Hay, which currently include cycle hire facilities and a small food kiosk could also be developed into a more substantial facility. Both of these are owned and run by the Peak District National Park Authority. Other cycle hubs including Middleton Top (owned by Derbyshire County

[5] These 2 connections are not included in the recent bid to DfT as part of the PNP connectivity project

Council) and Carsington Water and Fairholmes (owned by Severn Trent Water) may also offer opportunities for development.

Another strand to the emerging success of cycling in the county is encouraging local businesses and attractions to provide a good ‘cyclists welcome’. Training and support for investment in facilities such as cycle racks needs to be provided as part of the strategy.

It is recognised that the offer for cycling in the area is ‘emerging’ as a cycling and is particularly well placed to attract the softer end of the market as well as cater for more experienced cyclists. The cycling strategy being prepared by the National Park Authority is currently in draft form and reflects this.

Lead delivery partner: DCC

Deliverability: High

Impact: Medium

The Derwent Valley Mills World Heritage Site offers opportunities for walking and cycling trails, linking the sites along the river. Way marked paths would need to be created along the route which is flat and therefore accessible to a wide range of users.

The Derwent Valley Heritage Way is already a way marked 55 miles route from Ladybower to Derby which runs parallel along some sections. The original development work for a braided way including Cycle path came through the DVMWHS and may be resurrected.

Lead delivery partner: DCC

Deliverability: Medium

Impact: Low

THE ARCHEOLOGICAL WAY, BOLSOVER

The redevelopment of the Archaeological Way in Bolsover District has just had £631,000 of grant funding approved to deliver a significant part of the 18.5km trail between Pleasley Pit Country Park and Creswell Crags. The trail should be completed by the end of 2015 and will connect into the Phoenix Greenways, which has over 37km of trails running through North East Derbyshire, Bolsover, Ashfield and Mansfield.

There is currently still a funding gap which needs to be filled in order for this project to be delivered.

Lead delivery partner: DCC

Deliverability: High

Impact: Low

OTHER

An opportunity to develop Derby City specifically as a cycling friendly city has also been identified because of the potential links between the new velodrome, cycle hubs and wider cycling initiatives being developed in the Peak District. The city could capitalise on the volume and profile of cycling projects being developed in the county as a whole.

Lead delivery partner: Derby City Council

Deliverability: High

Impact: Medium

6.11 RETAIL

DERBY

Despite the development of the Westfield Shopping Centre, the Derby Retail strategy suggests that the city still has some way to go to compete with other regional centres.

The report identifies a particular gap in the premium offer/high quality department stores as well as certain of areas where voids are particularly high.

Delivering the retail strategy will be important in the overall destination offer.

Lead delivery partner: Derby City Council

Deliverability: Medium

Impact: High

BUXTON

The retail offer in Buxton is currently variable and although there are some good independent shops there are also a large number of value chains and discount stores. Customer service is also variable.

As part of the improvement of the destination, led by the opening of The Crescent, the quality of the retail experience needs to be addressed.

The University has identified plans for a Retail Training academy which would encourage new higher quality retail entrepreneurs and improve standards of service. The proposal needs funding.

The indoor market at Pavilion Gardens has potential to be improved through the scheme and could provide an interesting destination offering high quality local food and crafts.

An SME grant programme (as above) would prove valuable in implementing the strategy.

Lead delivery partner: High Peak Borough Council/ University of Derby, Buxton

Deliverability: High

Impact: Medium

CHESTERFIELD

The Northern Gateway Development in Chesterfield is a £50m project which includes a high quality shopping and leisure area and will feature a major foodstore, shops and restaurants, a cinema, 80 bed hotel, 85 homes, commercial floorspace, and replacement car parking spaces, plus an outdoor performance area.

The flagship project is being led by Chesterfield BC and their preferred development partner, Wilson Bowden Developments. Although proposals are relatively well developed planning permission has not been applied for and the funding is not in place.

Lead delivery partner: Chesterfield BC/Private partners

Deliverability: High

Impact: High

The Open Market is another area of Chesterfield's retail offer in need of further development. Chesterfield has recently completed over £4m refurbishment on the Victorian Market Hall and the Open Market but additional work needs to be carried out on the Open Market to provide traders and the public with a better trading environment to secure the future of Chesterfield markets. This aspiration will be a council priority in 2014/15.

Lead delivery partner: Chesterfield BC

Deliverability: High

Impact: Medium

6.12 FOOD & DRINK

DERBY MARKET HALL

Derby Market Hall is a particularly fine building which currently houses a mix of food, fashion and bric-a-brac stalls. The Market Hall has a particular reputation for its local food and drink enhanced by weekly cookery demonstrations from chefs.

With some modification to the current offer, the Hall could be developed into a stunning ‘buy and eat’ market, with a regional reputation for local and speciality foods. This could be a stronger project if extended to include the Guildhall rooms and theatre.

SALUSHALL BRIGGEN GOURMET MARKET, GOTHENBURG

Salushall Briggen Gourmet Market is an excellent modern food market that has been created from a restored tram shed. It combines a range of delicatessen counters with extensive restaurant areas, both table service and counter service, interior and exterior. It anchors the trendy Linné neighbourhood. The characteristic of most successful modern food markets is that they are as much about eating on the premises as they are of buying.

Lead delivery partner: Derby City Council

Deliverability: Medium

Impact: Medium

DERBYSHIRE FOOD & DRINK PROGRAMME

There are a number of food festivals and events which take place around the region including the Derbyshire Food & Drink Festival organised by Derbyshire County Council which takes place in different venues each year.

The food and drink programme could be co-ordinated and promoted jointly to present a more visible presence for local produce. Increased use of the DMS system more by organisers would also aid in this.

The county's particular strength as a real ale destination, and the growing number of microbreweries, could also be promoted more assertively. Derby in particular is a centre for real ale as this is where much of the activity is concentrated.

Lead delivery partner: VPD/ Councils

Deliverability: Medium

Impact: Low

6.13 VISITOR SERVICES

VISITOR INFORMATION REVIEW

Visitor information provision has changed significantly in recent years as local authorities have been forced to close Tourist Information Centres and visitors increasingly use online and mobile sources of data.

There is now an important need to review the way that information is provided and to consider more flexible forms of provision. Initiatives that should assessed include working with commercial partners to provide information from other locations and considering how new technologies can best be used. Consideration should be given to how to reduce duplication in the provision of online information and apps.

The World Heritage site includes for example, Belper Ambassadors scheme where shop keepers and other business workers are trained to offer information and promote the area to visitors, this could be rolled out more widely if a review concluded that this sort of thing were needed.

DARTMOOR (TAVISTOCK & OKEHAMPTON TICS)

Earlier this year West Devon Borough Council was forced to withdraw funding to save c.£50K – new solutions to providing information have had to be found. Initiatives include:

- Training retailers as Ambassadors to help visitors
- Encouraging visitors to scan QR codes displayed in shop windows to access online tourist information
- Touch screen visitor information points at Waitrose with a website where bookings can be made
- The museum of Dartmoor life will also be providing tourist information in house and would be staffed solely by volunteers

The existing visitor information strategy needs to be updated as part of a national review. VPD should work with Visit England and other DMOs to look at new models for the future. Relevant LA partners will be involved as appropriate to ensure local delivery.

Lead delivery partner: VPD/ Visit England

Deliverability: High

Impact: Medium

PLACE BRANDING AND SIGNAGE

There is need for more interpretation and signage, particularly off key routes such as the M1. The motorway services and Junctions 28-30 are key points for this. Signage and branding of events in Derby city should also be enhanced. To maximise the potential of events that currently happen in the city and to attract new events (particularly with a view to the added potential of MUSA) the city should have a range of event advertising opportunities that offer the opportunity to dress the city in festival mode, and/ or promote the event in advance and for the duration.

Lead delivery partner: VPD/ DCC

Deliverability: Medium

Impact: Medium

6.14 OTHER

BRAND

The most significant finding from the first stage of work was the inconsistency in the way in which the destination is branded. .

'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.

A single brand should be agreed and promoted consistently'.

The reason that different names appear in different places is understandable. Local authorities are responsible for the signage which appears on roads and for the names they use on their websites. There is a natural desire to use the name of the authority. Unfortunately, this confusion of brands reduces the opportunity to present a single, strong destination.

Most visitors recognise 'The Peak District' as the brand for the National Park area. Many would also undoubtedly assume that towns on the edge of the National Park, such as Leek, Matlock, Buxton and Ashbourne were also part of 'The Peak District'. A Peak District destination brand could spread beyond the boundaries of the National Park of course and embrace places which fall within the area as perceived by visitors.

A terminology would need to be agreed which allows the name to be used consistently alongside the destinations within it (for example Bakewell within The Peak District etc.)

It should also be agreed where it will be used, for example on websites, leaflets and visitor signage. There is a particular opportunity to promote the destination name clearly on road signs on the busy stretch of the M1.

There will need to be senior level commitment to the destination brand if it is to be implemented effectively. Visit Peak District should bring together senior representatives from each of the local authorities and present the case. It should be recognised that in adopting an agreed brand for the wider destination, this does not of course impact negatively on existing destinations. The Lake District, for example, sits within Cumbria and includes destinations such as Windermere and Ambleside.

Lead delivery partner: VPD

Deliverability: High

Impact: High

BROADBAND CONNECTIVITY & MOBILE SIGNAL

Good, fast internet access and mobile phone signals are now expected by most visitors everywhere. Increasingly, visitors are using on line and mobile sources for information and interpretation.

In some rural areas in the National Park connectivity is limited.

Discussions should be held with providers to agree a strategy for improvements.

Lead delivery partner: VPD

Deliverability: Low

Impact: Low

WORLD HERITAGE SITE

The World Heritage Site should be highlighted for the purposes of this project but it should be recognised that the opportunity lies in and funding should be directed at the individual sites within the WHS. Improving the visitor experience at individual sites is likely to make the biggest impact rather than seeking to promote the WHS per se and this should be kept on the agenda.

Lead delivery partner: Arkwright Society

Deliverability: Low

Impact: Low

6.15 SUMMARY

Name of Investment	*Location*	*Current Description*	*Investments needed*	*Lead delivery partner*	*Impact*	*Deliverability*
			Access			
Rail improvements	Gateway towns	Infrequent, outdated and expensive service	Negotiations with operators /possible funding to improve service	VPD/DCC	H	H
Bus service - Hopper bus	Peak District	Develop a similar scheme to in the National Forest where Hopper bus enables linkages between attractions and towns	Negotiations with bus companies/funding	VPD	M	M
Integrated transport - cycle friendly buses	Various	Cycling friendly facilities on buses and trains is currently limited	Bike racks on trains and buses	VPD	M	M
Integrated transport information	Peak District	A more integrated approach needed	Strategy needed	VPD	L	L
Cromford Canal tunnel re-opening	Cromford	Led by friends of the canal, initial feasibility study completed	Would require significant levels of funding	Friends of Cromford Canal	L	L
Coach parking	Derby/Derbyshire	No/Limited coach parking in some towns	Designate areas	Derby City Council/DCC	L	L

Attractions						
Silk Mill	Derby	Plans are being developed to reopen the Mill as a new high quality museum	Support for funding	Derby Museums	M	H
Bugsworth Basin	Buxworth	No visitor centre or parking	More visitor facilities needed	Canal & River Trust	M	M
Rosliston Forestry Centre	Rosliston	Upgrade of visitor centre needed	Support for funding	South Derbyshire District Council	M	M
Cromford Mill	Cromford	Fundraising underway for second stage of an ambitious 4 stage development	Support for funding	Arkwright Society	H	H
Transhipment Warehouse	Whaley Bridge	Disused warehouse with canal running through it. Redvelopment options include restoring the building and introducing a café, events space, offices and holiday accommodation. New build alongside would house community facilities.	Support for funding	Canal & River Trust	M	M
Derby Arm Project	Derby	A new boat lift for the proposed restored Derby Canal which will be a tourist attraction in a similar way the the Falkirk Wheel	Support for funding	Derby and Sandiacre Canal Trust	M	L
Staveley Hall	Staveley	Scheme to restore the Hall and gardens and provide a visitor offer and community facilities.	Support for funding	Staveley Town Council	M	H
Rolls Royce museum	Derby	Opportunity for iconic museum could be investigated further	Feasibility study	Rolls Royce Heritage Trust	L	L
Mercia Marina	Willington	Planning permission already granted for further development.The Boardwalk is now under construction which will add further restaurant/retail/office space and be completed in 2014	Support appropriate development	Mercia Marina	L	L
Joseph Wright	Derby	This aspect of the city's heritage is underplayed and funding is needed to develop e.g. a touring programme for the works. If a touring exhibition is successful in drawing visitors back to Derby there must be a state of the art facility which impresses once visitors arrive	Support for funding	Derby Museums	L	M
Buxton Museum re-development	Buxton	Museum could be refurbished as part of wider Buxton town regeneration	Feasibility study	Derbyshire County Council/High Peak Borough Council	L	L
Torr Vale Mill/Belper North Mill	New Mills/Belper	Torr Vale Mill has been subject to many development plans to secure the building's future.Belper North Mill is also at the same stage as Torr Vale Mill.	Support Preservation Trust in appropriate development	Preservation Trust	L	M

Accommodation						
Serviced accomodation development	Peak District	Lack of serviced accommodation throughout - places particularly noted Belper, Derbyshire Dales, NE Derbyshire	Accommodation strategy for the Peak District. Funding for strategy	VPD	H	H
Accommodation (Variable quality)	Peak District	Variable quality of serviced stock particularly independent properties	As above	VPD	M	H
Conferences & Exhibitions						
Dedicated conference venue	Derby	The city does not have a purpose built venue	Feasibility study	Derby City Council	H	M
Glossop Town Hall	Glossop	Public hall currently empty and in need of restoration	Feasibility study	High Peak Borough Council	L	L
Destinations & Hubs						
Gateway cities & towns	County	Better promotional links between gateway towns & National park	Destination strategies	VPD	L	M
Destination cities, towns & villages	County	Some important visitor destinations require development. Encourage the hubs to become cycle hubs as well by developing cycle hire facilities, businesses, connectivity with public transport.	Destination strategies	Local Authorities/ VPD	H	H
Research study	Derbyshire	A large scale research study needed which could properly identify visitor flows and other useful information about how visitors use the Peak District	Funding	VPD	H	H
Entertainment & The Arts						
New theatre	Derby	2007 study identified the need for a 1500 seat venue with fly tower.	Capital and revenue funding	Derby City Council	M	M
Strategy for sustainability, cultural venues	Derby	Funding concerns	Strategy for ongoing sustainability	Derby City Council	H	H

Festivals and Events						
Co-ordinated festivals programme	Derbyshire	Funding is uncertain. Co-ordinated programme is needed to reduce costs & improve visibility	Events team. Co-ordinated annual programme	Derbyshire Arts Partnership	M	M
Outdoor events spaces	Derby and Derbyshire	Public spaces need to be identified and used for events	Events plan to include suitable locations for events	Derby City Council/Derbyshire County Council	M	M
Night-time Economy						
Pavement culture	Derby/Chesterfield	Encourage a pavement culture with more outdoor eating and drinking to give the city a european feel/more vibrancy, development of more civic spaces	To ensure the visitor economy remains high profile and ensure the city/town is a safe place	Derby City Council/ Chesterfield BC	M	M
Purple flag status	Derby	Promote the city's safety marque	Use existing promotional channels	As above	M	M
Activities and Sports						
Cycle trails - Support the extension of trails not yet funded such as wyedale to Buxton connecting the White Peak Loop to Cromford	Wyedale to Buxton, Cromford	Potential loop which could link the High Peak, Tissington and Monsal trail with Buxton has been confirmed but there are still some outstanding links to be made to which there is a commitment	Funding to complete the routes	DCC	M	H
Development of trails along WHS	Derwent Valley	River Derwent provides a natural route for cycling and walking trails, however, trails which connect the full length of the WHS do not exist	Link trails along the whole of the WHS	DCC	L	M
Encouraging cycling friendly businesses	At cycling hubs and key linking towns	This is about inducing private sector businesses and attractions to be cycling friendly and give a cyclists welcome. If done together with route development and hub improvements this could produce a cumulative effect and a big step change in the quality of the offer	Support programmes	PDNPA	M	H
Develop Derby City as cycling friendly	Derby City	In order to capitalise on the link between the velodrome and wider cycling inititives	Action Plan	Derby City	M	H
Archaeological Way	Pleasley to Creswell	ERDF, HLF and DCC local transport plan funding has been secured to create an 11 mile walking and cycling trail. The project is one of the main projects to be funded through the Limestone Journeys HLF funded landscape partnership.	Funding to fill gap	DCC	L	H

			Retail			
Retail Improvements	Derby	Lack of premium department stores and high voids in certain areas but there is a good independent offer	Deliver improvements in retail strategy	Derby City Council	H	M
Retail Improvements	Buxton	Quality of the retail offer and customer service is lacking	Retail improvement plan. Retail Academy (University). SME grants	University of Derby/ High Peak Borough Council	M	H
Pavilion Gardens	Buxton	Invest to improve the market and extend opening hours	Funding	As above	H	H
Northern Gateway Development	Chesterfield	£50m project, a high quality shopping and leisure area - will feature a major foodstore, shops and restaurants, a cinema, 80 bed hotel, 85 homes, commercial floorspace, and replacement car parking spaces, plus an outdoor performance area.	Funding	Chesterfield BC/Private partners	H	H
Open Market	Chesterfield	Chesterfield has recently completed over £4m refurbishment on the Victorian Market Hall and the Open Market - additional work needs to be carried out on the Open Market to provide traders and the public with a better trading environment to secure the future of Chesterfield markets. This aspiration will be a council priority in 2014/15	Funding	Chesterfield BC	M	H
			Food & Drink			
Derby Market Hall	Derby	Should be a showcase for quality local produce	Feasibility study	Derby City Council	M	M
Expand Derbyshire food & drink programme	Derbyshire	Food and drink fairs/theme in its infancy	Expand food and drink fairs as part of an events strategy	VPD/ Councils	L	M

Visitor Services						
Visitor Information review	Peak District	A need to find a more effective way of servicing visitor needs	Update existing strategy	VPD	M	H
Place Branding and signage	Peak District & Derby	A need for more interpretation and signage, particularly off key routes such as the M1. The motorway services and Junctions 28-30 are key points for this. Signage and branding of events in Derby city should also be maximised	Strategy	VPD/DCC	M	M
Other						
Brand	Peak District	Consistent brand needed for Peak District area. To be applied consistently on signage and promotional material.	Agreement amongst key stakeholders; funding	VPD/ Councils	H	H
Mobile & Broadband connectivity	Derbyshire	Limited connectivity in some rural areas for visitor apps/websites	Discussions with service providers	VPD	L	L
World Heritage Site	Derwent Valley Mills	Has had inconsistent development and funding but the opportunity lies in developing individual sites rather than the WHS as a whole however the right investment in certain sites along the WHS is of high importance	Pursue development opportunities for individual sites as detailed	Arkwright Society	See individual sites	See individual sites

7 TOURISM IMPACT TOOLKIT

7.1 INTRODUCTION

This section sets out summary guidance to those involved in investment decisions in the public sector on determining the potential value for money of tourism-related projects and programmes. It summarises how the economic impact of alternative interventions can be assessed. In doing so, the summary guidance seeks to assist the process of prioritising interventions, enabling choices to be made in a, as far as possible, consistent, transparent and rational way.

The resources allocated to assessing the economic impact of an intervention should be proportionate to the nature and scale of the project or programme under consideration. Interventions that are novel, contentious or involve a high level of risk will require more in-depth analysis, as will those that involve a significant amount of public expenditure. For smaller projects, it may be appropriate to undertake a higher-level assessment.

Assessing economic impact and value for money is not a straight forward task. However, this summary guide is intended to be accessible to non-specialists in order to provide an understanding of the principles involved and the appropriate methodology to apply. Where technical terms are covered, reference has been made to further detailed guidance. For certain projects, the assistance of suitably qualified and experienced appraisal practitioners may though be required.

7.2 PURPOSE AND SCOPE

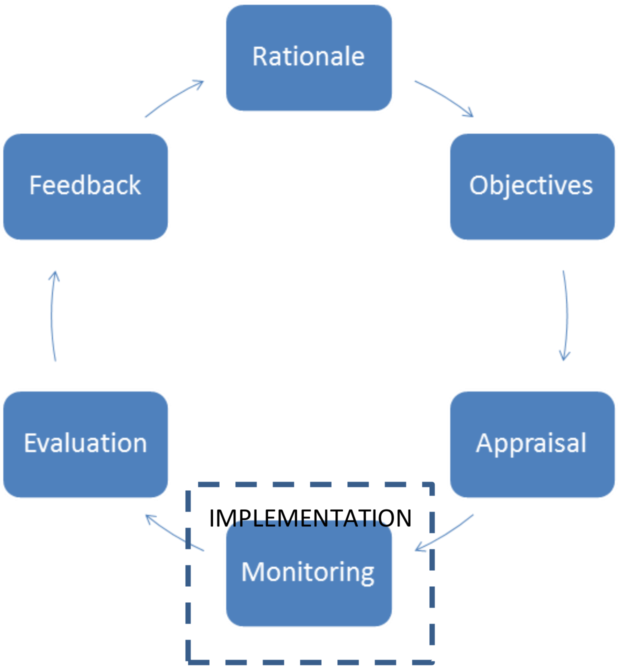
It is envisaged that this guidance will primarily be used to support the early stage appraisal of tourism-related projects and programmes. Specifically, it provides a methodology for calculating the potential number of jobs and Gross Value Added (GVA)[6] that could be generated by a given intervention. It should be noted that assessing the benefits of a project or programme is only one of the steps involved in appraising an intervention. Other issues, such as defining options and assessing risks, will also need to be considered as part of a comprehensive appraisal.

HM Treasury recommends that the '5 Case Model' is used to assess the business case for investment decisions – this guidance is concerned with part of the 'economic case'. It therefore does not cover strategic fit ('strategic case'), the need for public funding and affordability (the 'financial case'), commercial aspects (the 'commercial case') or achievability (the 'management case').

The assessment of economic impact, as part of project appraisal, is an important component of an intervention's lifecycle, which will also include strategy development (rationale and objectives), monitoring, evaluation and feedback (see Figure 5). While the focus of this guidance is on appraisal, the processes and logic outlined in the toolkit below will also be relevant to other aspects of an intervention's lifecycle, in particular monitoring and evaluation.

[6] GVA is a measure of the economic value of goods and services produced in an area. It is defined by the Office for National Statistics (ONS) as "…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." As such, GVA is an important economic indicator of the level of economic activity and productivity within an area/sector.

Figure 5: ROAMEF Cycle



Source: HM Treasury 'Green Book'

The toolkit outlined below encompasses an assessment of value for money, as determined by the relationship between total public sector costs (the resources an intervention uses up) and total benefits (including, in particular, the outputs and outcomes an intervention is anticipated to achieve). In appraisal guidance literature, value for money in this respect is commonly referred to as 'efficiency'.

Although the focus of this guidance is on 'efficiency', it is important to note that this is not the only component of value for money that will need to be considered when appraising a given intervention. 'Economy' (the ratio of costs to inputs) and 'effectiveness' (the extent to which the intervention will achieve the desired objectives) are also key factors in determining overall value for money. Similarly, the strategic added value of an intervention and its other wider outcomes may also be important in deciding whether public sector support is justified.

7.3 ASSESSING ADDITIONALITY

In developing and appraising interventions it is important to assess their full likely consequences and to identify what their extra benefits will be compared with the likely effect of doing nothing or with doing minimum. An intervention that just supports activities that would have happened anyway or that would have a significant adverse effect on another area or group in society is not a good value investment. As such, the assessment of additionality forms a key part of this toolkit.

Within the now Department for Communities and Local Government's (DCLG's) guidance on *Assessing the Impacts of Spatial Interventions*, additionality is defined as:

> *"The extent to which activity takes place at all, on a larger scale, earlier or within a specific designated area or target group as a result of the intervention"*

The key components of additionality are summarised in Figure 6. Assessing additionality is not a mechanistic process; it involves informed judgements based on the best available evidence about the intervention. The Homes and Communities Agency's (HCA's) Additionaity Guide provides a technical and detailed explanation of assessing additionality. It is aimed principally at economists and other suitably qualified and experienced professionals, although it also provides a useful overview and introduction to the key concepts for non-economists.

Figure 6

Key components of additionality

Intervention options: these are the alternative ways or options that the public sector might choose in order to intervene to achieve its objectives.

Reference case: this is the estimate of what level of target outputs/outcomes would be produced if the intervention did not go ahead. It is the 'do nothing' or do minimum option and the outputs/outcomes produced under this option are referred to as deadweight. In some cases, deadweight might be estimated by assuming that a proportion of the total gross additional local effects would go ahead anyway under the reference case. However, the preferred approach is to construct and quantify a specific reference case scenario.

Gross direct effects: an estimate of the total effect of an intervention option or the reference case in terms of a specific output or outcome (for example, number of jobs or GVA).

Leakage effects: the number or proportion of outputs (occurring under the reference case and the intervention options) that benefit those outside of the intervention's target area or group should be deducted from the gross direct effects.

Displacement: the number or proportion of intervention outputs (occurring under the reference case and the intervention options) accounted for by reduced outputs elsewhere in the target area should also be deducted.

Substitution effects: this effect arises where a firm substitutes one activity for a similar one (such as recruiting a jobless person while another employee loses a job) to take advantage of public sector assistance. Again these effects need to be deducted. However, in terms of tourism-related interventions, substitution effects will usually not apply and therefore they have not been considered as part of the toolkit.

Economic multiplier effects: further economic activity (jobs, expenditure or income) associated with additional local income, local supplier purchases and longer term development effects then need to be added.

Crowding out and crowding in: for very large interventions, consideration will also need to be given to crowding out and crowding in effects. These effects occur where increases in public expenditure cause other variables in the economy to adjust resulting in either a decline (crowding out) or increase (crowding in) in private expenditure. These effects are normally considered only in very large appraisals concerned with regional and national level impacts.

Source: Adapted from the HCA's 'Additionality Guide'

One important factor to consider when assessing the additional impact of an intervention is the target area and/or groups, as this can affect the assumptions in relation to leakage, displacement and multiplier effects. The target area or group should relate directly to the identified need (the rationale for intervention) and be wide enough to take into account spill over or unintended effects on other groups, areas or markets. It may be appropriate to consider the effects at different spatial levels, although commonly appraisals are carried out at the local authority or sub-regional level.

Another important early step in assessing additionality is measuring the baseline position. For tourism-related projects this will often relate to the number of visitors or quantum of visitor expenditure associated with a particular site/attraction or area at the beginning of the intervention period. However, care should be taken not to confuse the baseline with the reference case. The latter refers to what would happen if the intervention did not go head and could, for example, involve a decline or increase in the number of visitors compared to the baseline.

7.4 TOURISM IMPACT TOOLKIT

The methodology adopted to assess the economic benefit of tourism-related projects and programmes has been informed by guidance produced by VisitEngland[7] and the Tourism Intelligence Unit at the Office for National Statistics (ONS).[8] It also takes into account the requirements of government appraisal guidance, including the HM Treasury's guide to Appraisal and Evaluation in Central Government (referred to as 'The Green Book') and the Homes and Communities Agency's Additionality Guide.

The recommended approach to quantifying the economic impact of alternative interventions is set out in the toolkit below, relating to four principal measures of benefit: visitors; visitor expenditure; economic contribution (gross value added (GVA); and tourism-related employment. The estimation of a project's employment and GVA impact will provide the basis for assessing value for money, in relation to the public sector cost per net additional job and the ratio of economic benefits to costs.

The toolkit is relatively detailed in scope, in part to ensure that it can be applied to a range of different tourism-related projects and programmes. However, through the use of benchmarks, it is possible to undertake a high-level assessment, which may be appropriate for smaller scale projects and those interventions which are only at concept stage. A worked example of how benchmarks can be applied is outlined in 7.5.

The toolkit draws principally on the use of existing secondary data sources. This reflects its focus on supporting the early stage appraisal of tourism-related interventions, when it may not yet be feasible to collect the necessary detailed project data. However, it will be important that more specific, primary data is collated, such as through the use of visitor surveys, as intervention proposals are worked-up.

[7] VisitEngland ( ), *What is Tourism Worth: Understanding the Value of Tourism at Regional and Sub-Regional Level.*
[8] ONS (2011), *The Sub-Regional Value of Tourism in the UK in 2008.*

Tourism impact toolkit			
Visitors			
Output	**Description**	**Basis for estimate**	**Published data sources / guidance**
(i) Gross number of visitors attracted	Estimate of the number of visitors that are expected to be attracted by the project.	In order to estimate the number of visitors, information can be used from the following sources: • primary research, including use of visitor surveys; • review of analogous schemes; and • evaluations of the impact of comparative interventions.	Preference should be given to primary data or bespoke research of analogous schemes.
(ii) Profile of visitors attracted	Profile of the visitors attracted, including: • number of day visitors; • number of overnight visitors; and • origin of visitors (from within Derbyshire, from elsewhere within the UK and from outside of the UK).	The profile of visitors attracted will depend on the type of project being assessed. Therefore, use should again be made of primary research and evaluation evidence relating to analogous schemes. Where primary / evaluation evidence is not available, reference can be made to benchmark ratios for Derbyshire. For example according to VisitEngland data in 2011, of the overall number of tourists to Derbyshire, approximately 90% were day visitors and 10% were overnight visitors. Careful consideration should be given to using such default values and the reasoning why they are appropriate should be clearly explained.	The GB Tourism Survey (GBTS) – measures volume and value of all domestic overnight tourism http://www.visitengland.org/insight-statistics/major-tourism-surveys/overnightvisitors/index.aspx The GB Day Visits Survey (GBDVS) – measure of day visits, volumes and activities http://www.visitengland.org/insight-statistics/major-tourism-surveys/dayvisitors The International Passenger Survey (IPS) – measures of volume and value of inbound tourism to the UK http://www.visitbritain.org/insightsandstatistics inboundvisitorstatistics

			/latestdata/index.aspx
(iii) Net additional visitors attracted	Net additional visitors attracted, taking account of: • deadweight – the proportion of visitors that would have come to Derbyshire even in the absence of the project; and • displacement – the proportion of visitors accounted for by reduced visitor numbers elsewhere in Derbyshire. Net additional visitors attracted will equal: AI = GI x (1-D) x (1-Dp) Where: AI = Net additional impact GI = Gross impact D = Deadweight Dp = Displacement	**Deadweight** should be based on what would be expected to happen if the proposed project does not go ahead. It can often be helpful to develop a 'reference case', modelling how visitor numbers might change without any intervention. In relation to tourism-related projects, deadweight can be quantified by estimating the proportion of visitors for whom the project is not the principal reason or is not one of the main motivating factors for making the visit. Where the project is one of a number of motivating factors, deadweight should still be applied, reflecting the comparative influence of the scheme on a visitor's decision to make the trip. Ideally, the estimates of deadweight should be based on visitor surveys of analogous schemes. Benchmark deadweight ratios are provided by the Department for Business, Innovation and Skills (BIS) and the Homes and Communities Agency (HCA), but care should be taken when using such benchmarks to ensure they are appropriate and reasonable in relation to the project under consideration. As a rule of thumb, **displacement** should equate to the proportion of visitors who are expected to come from within Derbyshire. For most projects, it is likely that a large proportion of expenditure by visitors from within Derbyshire would still occur within the sub-region even in the absence of the proposed intervention. Therefore, the project would be displacing this spend from other	Homes and Communities Agency's (HCA's) Additionality Guide – provides guidance on how to calculate additionality and identifies a range of benchmark additionality ratios https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/191511/Additionality__Guide_0.pdf Department for Business, Innovation and Skills' (BIS's) additionality guidance (Research to improve the assessment of additionality) – sets out benchmark estimates of additionality at the sub-regional and region level https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/191512/Research_to_improve_the_assessment_of_additionality.pdf

		local events, activities or services.	
Visitor expenditure			
Outcome	**Description**	**Basis for estimate**	**Published data sources / guidance**
(I) Gross visitor expenditure	Estimate of the total expenditure of visitors expected to be attracted by the project.	So as to estimate the gross visitor expenditure associated with a project, average spend per visitor figures should be calculated for each visitor type (specifically day visitors, overnight visitors and visitors from overseas). These estimates should again be determined using information from primary research and evaluation evidence relating to analogous schemes. If it is not feasible to undertake primary research and/or evaluation evidence is not available, reference can be made to benchmark ratios for Derbyshire. For example, according to VisitEngland data in 2011, day visitors spent on average £29.27 while overnight visitors spent £134.10 per trip. The average spend recorded by the IPS for visitors to Derbyshire from overseas in 2011 was £392.38. Average visitor spend figures should be applied to the estimates of visitor numbers for each visitor type, so as to calculate the total gross visitor expenditure generated by the proposed project.	GBTS – measures volume and value of all domestic overnight tourism http://www.visitengland.org/insight-statistics/major-tourism-surveys/overnightvisitors/index.aspx GBDVS – measure of day visits, volumes and activities http://www.visitengland.org/insight-statistics/major-tourism-surveys/dayvisitors IPS – measures of volume and value of inbound tourism to the UK http://www.visitbritain.org/ insightsandstatistics inboundvisitorstatistics /latestdata/index.aspx
(ii) Net additional	Net additional visitor expenditure,	The estimates of **deadweight** and **displacement** should correspond to the	HCA's Additionality Guide – provides guidance on how to calculate additionality

visitor expenditure	adjusting for: • deadweight – the proportion of visitor expenditure that would be incurred in Derbyshire anyway, even in the absence of the project; • displacement – the proportion of visitor expenditure that would be accounted for by reduced spend elsewhere in Derbyshire; • leakage – the proportion of visitor expenditure that would be incurred outside of Derbyshire; and • multiplier effects – further economic activity associated with additional local income and local supplier purchases multiplier effects. Net additional visitor expenditure will equal: AI = GI x (1-D) x (1-Dp) x (1-L) x M Where: AI = Net additional impact GI = Gross impact D = Deadweight Dp = Displacement L=Leakage M=Multiplier	assumptions made in relation to net additional visitors attracted. **Leakage** will relate to the extent to which expenditure by visitors is expected to be on goods and services located outside of Derbyshire. This will depend, in part, on the geographical location of the project. It will also vary by visitor type, with, for example, the expenditure of overseas visitors often being more widely dispersed. In order to determine the level of expected leakage, where feasible, primary research should be undertaken of visitors to the local area. Reference should also be made to analogous research / evaluations. **Multiplier effects** can be difficult to quantify. However, there are a number of ways in which estimates can be derived, including: • surveys of businesses and employees; • review of previous research/evaluations; • use of existing economic models for Derbyshire; and • reference to published input-output tables. STEAM data for Derbyshire suggests an indirect (supply chain) multiplier of 1.40, whereas guidance produced by BIS identifies sub-regional composite (indirect and induced) multipliers varying from 1.20 to 1.98, depending on the type of intervention. In using data from secondary sources such as the Scottish Input-Output tables or from	and identifies a range of benchmark additionality ratios https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/191511/Additionality__Guide_0.pdf BIS's additionality guidance (Research to improve the assessment of additionality) – sets out benchmark estimates of additionality at the sub-regional and region level https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/191512/Research_to_improve_the_assessment_of_additionality.pdf Scottish Government's Input-Output tables – provides information on multiplier effects for individual Scottish industries, which demonstrates the extent of the difference between various sectors http://www.scotland.gov.uk/Topics/Statistics/Browse/Economy/Input-Output

		econometric studies, care should be taken to consider the spatial level at which the multipliers have been calculated.	
Tourism-related employment			
Outcomes	**Description**	**Basis for estimate**	**Published data sources / guidance**
(i) Gross employment	Estimate of the gross number of jobs that are expected to be created by the project.	An estimated of the gross number of jobs that might be created by a project can be calculated by dividing the gross visitor expenditure by an average spend per job figure. Analysis developed by Caledonian Economics for the Tourism Alliance and VisitBritain identified that an increase in tourism revenue of circa £50,000 will support one new job. Alternative spend per job figures for a range specific sectors, such as food and accommodation, can be derived from the Annual Business Survey, which sets out turnover and employment data at the UK level. In calculating the employment impact, it should be made clear whether the increase in tourism expenditure, and consequential increase in employment, is a 'one-off' or will be sustained for a number of years. For projects that involve the development of commercial floorspace or operation of a new facility/service, it may be appropriate to also calculate the direct 'on-site' employment impact. Where the quantum of development is known, standardised employment density ratios can be applied to derive an estimate of the number of jobs created (see HCA's	Annual Business Survey (ABS) – provides a breakdown, at Standard Industrial Classification 2007 Division level, of total turnover, approximate gross value added and total employment http://www.ons.gov.uk/ons/publications/re-reference-tables.html?edition=tcm%3A77-303374 HCA's Employment Densities Guide – sets out guidance to assist appraisers in the estimation of employment generated by property development based on employment density ratios. A range of benchmark ratios for different uses are identified within the guide http://www.homesandcommunities.co.uk/employment-densities-guide-2nd-ed

		Employment Densities Guide). Care should be taken to avoid double counting. Where 'on-site' activity is supported by visitor expenditure, the employment impact of this activity will have already been taken into account in dividing the overall gross visitor expenditure by an average spend per job figure.	
(ii) Net additional employment	Net additional employment, taking account of: • deadweight – the proportion of jobs that would have been created anyway, even in the absence of the project; • displacement – the proportion of jobs that would be accounted for by reduced employment elsewhere in Derbyshire; • leakage – the proportion of jobs that would be taken-up by residents outside of Derbyshire; and • multiplier effects – further economic activity associated with additional local income and local supplier purchases multiplier effects. Net additional employment will equal: AI = GI x (1-D) x (1-Dp) x (1-L) x M Where:	The estimates of **deadweight**, **displacement**, **leakage** and **multiplier effects** should correspond to the assumptions made in relation to net additional visitor expenditure. A further adjustment should be made for **leakage** to reflect how many of the jobs created are expected be taken-up by non-Derbyshire residents. Leakage can be estimated through the use of a number of potential sources: • published secondary sources, such as travel to work information; • local business surveys undertaken; • labour market studies; • evaluations of previous programmes may have included estimates of leakage; and • surveys/primary research. Benchmark leakage ratios are provided in guidance produced for BIS and the HCA,	HCA's Additionality Guide – provides guidance on how to calculate additionality and identifies a range of benchmark additionality ratios https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/191511/Additionality_Guide_0.pdf BIS's additionality guidance (Research to improve the assessment of additionality) – sets out benchmark estimates of additionality at the sub-regional and region level https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/191512/Research_to_improve_the_assessment_of_additionality.pdf Nomis / Census UK travel flows – includes datasets outlining area of resident and area of workplace at local authority and ward level http://www.nomisweb.co.uk/

	AI = Net additional impact GI = Gross impact D = Deadweight Dp = Displacement L=Leakage M=Multiplier		
Economic contribution (gross value added)			
Outcomes	**Description**	**Basis for estimate**	**Published data sources / guidance**
(i) Gross GVA (per annum)	Estimate of the gross GVA that is expected to be generated by the project.	As the basis for calculating the gross GVA generated by a project, a benchmark ratio of visitor expenditure to GVA can be applied. Based on data produced by the Tourism Intelligence Unit, relating to the size of the tourism economy within Derbyshire, it is estimated that the overall ratio of GVA to visitor expenditure is 0.39:1. In other words, for every £1 of visitor spend, 39p of GVA is generated within the local economy. This ratio should be applied to the estimate of gross visitor expenditure for the project. Where 'on-site' employment is expected to be created, and this has not already been taken into account through the assessment of visitor expenditure, data from the ABS can be used to calculate average GVA per employee benchmarks. Based on ABS data, within Derbyshire the average GVA per full-time equivalent tourism-related employee is circa £35,000.	ONS Tourism Intelligence Unit – sets out an analysis of the economic value of tourism within the UK regions, sub-regions and local areas http://www.visitengland.org/insight-statistics/other-resources/ONS/index.aspx Annual Business Survey (ABS) – provides a breakdown, at Standard Industrial Classification 2007 Division level, of total turnover, approximate gross value added and total employment http://www.ons.gov.uk/ons/publications/re-reference-tables.html?edition=tcm%3A77-303374
(ii) Net additional GVA	Net additional GVA, adjusting for:	The estimates of **deadweight**, **displacement**, **leakage** and **multiplier**	HCA's Additionality Guide – provides guidance on how to calculate additionality

(per annum)	• deadweight – the proportion of GVA that would be generated in Derbyshire anyway, even in the absence of the project; • displacement – the proportion of GVA accounted for by reduced GVA elsewhere in Derbyshire; • leakage – the proportion of GVA that would be generated outside of Derbyshire; and • multiplier effects – further economic activity associated with additional local income and local supplier purchases multiplier effects. Net additional GVA will equal: AI = GI x (1-D) x (1-Dp) x (1-L) x M Where: AI = Net additional impact GI = Gross impact D = Deadweight Dp = Displacement L=Leakage M=Multiplier	**effects** should correspond to the assumptions made in relation to net additional visitor expenditure.	and identifies a range of benchmark additionality ratios https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/191511/Additionality__Guide_0.pdf BIS's additionality guidance (Research to improve the assessment of additionality) – sets out benchmark estimates of additionality at the sub-regional and region level https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/191512/Research_to_improve_the_assessment_of_additionality.pdf
(iii) Cumulative net additional GVA	Estimate of the overall net additional GVA expected to be generated over the life of a project	The total cumulative GVA impact of a project will be determined by how long the benefits are expected to persist for. The persistence of benefits will depend on the capacity of the individual/s or organisation/s involved to sustain the impacts of an intervention. The level of persistence will also vary between different types of project.	BIS's RDA evaluation, practical guidance – identifies estimates of persistence for a range of project types, including 'image, events and tourism' http://www.bis.gov.uk/files/file54095.pdf HM Treasury's Green Book – Annex 6 sets out how to calculate the present value of

		Estimates of persistence for a range of project types were produced by PriceWaterhouseCoopers (PwC) as part of their evaluation of the impact of Regional Development Agency interventions. These vary from between 2 to 10 years. In addition, consideration should be given to the potential for benefits to diminish over time, as opposed to remaining constant. The annual profile of GVA impact should be set out and the total cumulative 'present value' calculated, using the 'social time preference rate' (STPR) identified within the HM Treasury's Green Book – the recommended discount rate is 3.5%.	costs and benefits and the discount factors to be applied https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/220541/green_book_complete.pdf
Value for money			
Indicator	**Description**	**Basis for estimate**	**Published data sources / guidance**
(i) Cost per job	Public sector cost per net additional job created by the project	In order to determine the cost per job achieved by a project, first the annual cash flow of public sector costs should be identified and their 'present value' calculated. Again, the public sector costs should be discounted using the STPR of 3.5%. The total discounted public sector cost should then be divided by the number of net additional jobs to determine the project's cost per job ratio.	HM Treasury's Green Book – Annex 6 sets out how to calculate the present value of costs and benefits and the discount factors to be applied https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/220541/green_book_complete.pdf
(ii) Benefit cost ratio	The ratio of net additional GVA to public sector cost	The benefit cost ratio for a project will equate to the £'s of cumulative net additional GVA generated per £1 of public sector funding.	Department for Communities and Local Government's (DCLG's) guidance on valuing the benefits of regeneration – outlines a range of comparative benefit cost ratios by

			activity type https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/6382/1795633.pdf

7.5 HIGH-LEVEL WORKED EXAMPLE

A simple, high-level worked example is set out below, using some of the benchmarks identified in the toolkit above. For complex, larger scale projects, a more detailed assessment should be undertaken, ideally with primary research carried out to support the assumptions applied.

Figure 7: High-level worked example

Programme of food and drinks events		
Visitors		
(i) Gross visitors attracted	60,000	
(ii) Profile of visitors	54,000 day 6,000 overnight	Based on VisitEngland data, average split for Derbyshire (90% day, 10% overnight)
(iii) Net additional visitors	34,022	Based on benchmarks for deadweight (7.5%) and displacement (38.7%) contained in BIS guidance
Visitor expenditure		
(i) Gross visitor expenditure	£2,385,180	Based on VisitEngland data, average spend for Derbyshire (£29.77 day, £134.10 overnight)
(ii) Net additional visitor expenditure	£1,875,857	Based on benchmarks for deadweight (7.5%), displacement (38.7%) and multiplier effects (1.46) contained in BIS guidance Allowance for leakage of spend of 5%
Tourism-related employment		
(i) Gross employment	48	Based on average spend per job figure from Caledonian Model (£50,000) Jobs are one year full-time equivalents
(ii) Net additional employment	30	Based on benchmarks for deadweight (7.5%), displacement (38.7%) and multiplier effects (1.46) contained in BIS guidance Allowance for leakage of spend of 5%, allowance for leakage of employment of 20% based on Census travel flow data Jobs are one year full-time equivalents
Economic contribution (GVA)		

(i) Gross GVA per annum	£930,220	Based on ONS Tourism Intelligence Unit data (GVA to expenditure ratio of 0.39:1)
(ii) Net additional GVA per annum	£731,584	Based on benchmarks for deadweight (7.5%), displacement (38.7%) and multiplier effects (1.46) contained in BIS guidance Allowance for leakage of spend of 5%
(iii) Cumulative net additional GVA	£731,584	Annual programme of events, benefits persist for one year
Value for money		
(i) Public sector cost per job	£3,332	Based on assumed annual public sector cost of £100,000 (impact relate to one-year of funding) Cost per job ratio based on employment that will persist for one-year
(ii) Benefit cost ratio	7.3:1	Based on assumed annual public sector cost of £100,000 (impact relates to one-year of funding) For every £1 of public sector funding, £7.3 of net additional GVA will be generated

CONTACT DETAILS

Chris Melia
Email: chrismelia@amion.co.uk