Staffordshire Moorlands Tourism Study




Tourism Enterprise and Management

Head Office	**Project Management**
4 Thorburn Rd	Graham Barrow
Edinburgh EH13 0BQ	21 Ingersley Road
Email: info@team-tourism.com	Bollington, Macclesfield
Phone: 0131 466 1005	Cheshire SK10 5RE
	Phone 01625 573807

info@team-tourism.com

CONTENTS

Executive Summary

The overall aim of this tourism study is to provide an appraisal of the role and impact of the visitor economy of the Staffordshire Moorlands. It also aims to identify the opportunities for economic growth based on the visitor economy, with particular emphasis on the Churnet Valley corridor.

Part one: General trends and principles

This report commences with some generic concepts, including an overview of key national trends in tourism, and how these may affect the development of tourism in the coming years. This is followed with some general principles for sustainable tourism development.

Key national trends in tourism are:

- Recent UK economic conditions have influenced domestic tourism and encouraged the rise of the 'Staycation' - a trend which is forecast to continue
- Demographic changes, in particular an aging population, changing group and family structure and a move towards 'experiential' tourism
- Environmental trends, in particular the adaptation to and mitigation of climate change, being recognisably 'green' in the eyes of the consumer and the peaking of world oil production, which has implications for tourism transport
- Changes in technology highlighting the importance of convergence, user generated content and smartphones
- Trends in accommodation demands with a movement towards self catering and low cost serviced accommodation (Travel Lodge type), albeit a short-term trend as a result of the recession, and demand for ever improving standards in all accommodation types.

The sustainability debate is framed in terms of the VICE model which encourages consideration of the impact on visitors, industry, community and environment in any decision making process.

Part Two: Situation and market analysis

The report then focuses on a situation and market analysis of the Staffordshire Moorlands region, looking broadly at the existing tourism offer and current and potential markets.

In summary, the district is seen to have key strengths and opportunities:

- The two tourism brands of genuine national significance – Alton Towers and the Peak District

- A range of more modest, but nevertheless important, attractors including the pleasant market town of Leek, the industrial and natural history interest of the Churnet valley, the Churnet Valley heritage railway and the Caldon canal
- A very large catchment population within 2 hours travel time
- Development opportunities (sites) for further accommodation (e.g. high quality hotel, multiple units and self-catering) and mixed use sites including retail.

But the District has the following weaknesses:

- Staffordshire Moorlands District does not operate as a significant tourism destination or brand
- There are no large well-known towns to act as a focus and provide national profile (e.g. an equivalent to Buxton or Bakewell)
- Parts of the District (and the Churnet valley area in particular) are not easily reached by road and public transport.

In terms of accommodation[1]:

- 66% of the establishments are self catering
- A significant proportion of establishments are located in the Peak District (47%)
- The area immediately around Alton Towers accounts for 16% of the establishments but 50% of bed spaces. The two hotels in Alton Towers alone account for 31% of the district's bed spaces
- Outside the Peak District National Park and the Alton Towers area, there are no major concentrations of accommodation.
- There are no major hotels, except at Alton Towers.

In terms of economic contribution[2]:

- Tourism generated £158m of expenditure directly to the local economy in 2009
- This (with indirect and induced spend) supports an estimated 3,495 Full Time Equivalents jobs
- There were an estimated 3.35m trips to the Staffordshire Moorlands in 2009, of which 39,500 were overnight trips
- The main attractors which provide the basis for economic growth in tourism in the District are the Peak District National Park, Alton Towers, the Churnet Valley, Leek, and the inland water bodies of Rudyard Lake and Tittesworth Reservoir.

The market:

- 93% of trips are estimated to be day trips[3]

---

[1] Based on data provided by Staffordshire Moorlands District Council – accommodation audit (November 2010)

[2] Staffordshire Moorlands Tourism Economic Impact Assessment 2009, conducted by The Research Solution in 2010 and using the Cambridge Model

[3] Staffordshire Moorlands Tourism Economic Impact Assessment 2009

- The majority of visitors are repeat visitors[4].

The report describes a number of market segments that can be identified, based on their primary activities – these include:

- Business tourism
- Day visitors: Family Fun, Party Fun, Discoverers, Actives and Treat
- Staying visitors: Family Fun, Party Fun, Countrysiders and Special Interest

These segments are found in different concentrations across the District. Alton Towers segments (Family and Party Fun) are a captive market and benefits are largely contained within the resort.

The Staffordshire Moorlands, in its own right, does not function as an integrated destination – consequently it is not a brand or consumer proposition. The District has a number of tourism and destination brands: Staffordshire, Alton Towers and the Peak District. The Staffordshire brand aligns more readily to Alton Towers. This is a complementary (not competing) proposition to the Peak District and it is, in our view, right that the District is marketed under the umbrella of both the Peak District and Staffordshire. As a consequence the move away from a 'Staffordshire Moorlands' brand to one of 'Staffordshire's Peak District' is in our opinion a move in the right direction.

The District is also adjacent to the Potteries and from a Staffordshire perspective the Potteries are seen within the overall Staffordshire brand. However, there is limited scope or benefit in aligning the Staffordshire Moorlands with the Potteries in branding terms.

Part Three: Product development

The third section looks at product development opportunities. We suggest that product development opportunities are viewed in two ways, transformational projects and supporting projects and actions.

- **Transformational projects**

These major projects are about creating a step change in the visitor offer, they would be catalytic and start to transform the visitor economy of the area. These projects would have a significant impact on the tourism economy of the district – either in terms of direct impact or in terms of catalysing wider development. They are:

  - The Churnet Valley Railway developments
  - The Moneystone Quarry developments
  - Bolton Copperworks redevelopment
  - Cornhill, Leek and the potential development of Leek as a tourist town.

[4] This analysis is drawn from Staffordshire Moorlands Visitor Survey (HETB - 2003) and West Midlands Regional Visitor Survey (HETB and RJS Associates - 2002)

- **Supporting projects and actions**

These are projects and actions which would add depth or critical mass to either existing markets or new markets / products. They would also enhance the overall attractiveness and appeal of the District. However, in their own right their impact, while potentially worthwhile, is likely to have limited impact. These projects are underpinned with cross-cutting actions that enhance the overall quality of the visitor experience and provide a context for the transformational projects. They include:

  - Making more of Leek
  - Enhancing access to the area and connectivity within it
  - Developing new and improving the existing major attractions / attractors
  - Encouraging and promoting more events
  - Enhancing the accommodation stock
  - Going Green.

Section three also contains a separate sub-section specifically on the Churnet Valley - current situation, development potential, markets and positioning and product development.

The report concludes that the Staffordshire Moorlands District has the potential and capacity to attract more visitors. Key to this will be the projects of the Churnet Valley Railway, the Moneystone Quarry, Bolton Copperworks and Cornhill, Leek which could provide significant impact on the tourism economy of the District, either in terms of direct impact or in terms of catalysing wider development.

In addition, there are a number of support projects that would enhance and add depth to the offer of the area. These include enhancing its attractions and accommodation stock, the provision of more events and the greening of the offer. Key to the further development of the district is the development of Leek as a 'tourism town'.

The Churnet Valley has significant potential to be further developed as an attraction through the development of its heritage, nature based and active outdoor recreation products. These represent its core proposition to the market place.

The District has to benefit from positioning itself under the umbrella of the Peak District brand.

1. Introduction and context

In December 2010, TEAM Tourism Consulting was commissioned by Staffordshire Moorlands District Council to undertake a Tourism Study of the District. The overall aim of this study is to provide an appraisal of the role and impact of the visitor economy, and the opportunities for its economic growth across the District and in particular in the Churnet Valley corridor.

The key objectives of the study are in two parts as follows:

For the District Wide Study to:

- Provide an assessment of the current market and future market trends nationally and sub-regionally and highlight the opportunities and implications for the District
- Review the potential growth and development of the area
- Investigate the linkages to other areas of Staffordshire, especially in relation to industrial heritage and the Potteries
- Address issues associated with tourism development and impact on the natural environment and consider sustainable development principles.

For the Churnet Valley Tourism Corridor to:

- Identify the potential for opportunities and growth of tourism in the Churnet Valley Tourism Corridor
- Make recommendations for potential boundaries of the Churnet Valley Tourism Corridor to inform the production of the Churnet Valley Masterplan
- Make recommendations for key themes or opportunities for the Churnet Valley, based around the existing and potential visitor offer
- Identify the likely visitor market segments that would be attracted to the Churnet Valley
- Identify key areas for improvement for existing businesses in the Churnet Valley to maximise the potential of visitor income, and to actively contribute to delivering a quality visitor destination in the future
- Make recommendations for future investment – including addressing issues of deliverability and timescales.

This report is in three parts:

- It commences with some generic concepts, including an overview of key national trends in tourism, and how these may affect the development of tourism in the coming years, followed by some general principles for sustainable tourism development
- The second section focuses on a situation and market analysis of the Staffordshire Moorlands region, looking broadly at the existing tourism offer and current and potential markets
- The third section looks at product development opportunities. There is a separate sub-section specifically on the Churnet Valley.

Part one: General trends and principles

This section of the report identifies key trends and factors of change which are currently affecting the tourism industry and which will probably continue to influence the industry over the next 5 years (albeit some factors, like climate change will have much longer term impacts). The section commences with key national trends, under the headings of economics, demographics and society, environment, and technology. We then identify specific trends which are the most relevant to the Staffordshire Moorlands District. An expanded version of data that supports this section is presented in a Futures paper in the Appendices. This section also looks at some general principles which should underpin sustainable tourism development, illustrated by case studies which are in the Appendices.

2. Tourism Trends and Futures

2.1 Key national trends

2.1.1 Economics and tourism

In the short term there are several economic factors which will influence tourism and in particular, sustain domestic tourism:

- Data suggests that the domestic market has been relatively static, however, there was a significant upswing in domestic holidays in 2009, generated by two groups of Staycationers:
    - "Switchers" include a high proportion of families - they are primarily motivated to 'switch' a foreign holiday for one at home because of financial constraints
    - "Extras" who tend to be younger and are more likely to be single. They are less affected by their economic situation and are more motivated by a desire to explore the UK and go somewhere new.
- The Staycation is still significant, but news is a little mixed[5] . Recent research for Visit England showed the Staycation was as strong in 2010 as in 2009 and the Staycation trend was likely to continue. However, 2011 may lose some mid-length Switcher holidays in England, as they return abroad and UKTS year to date figures show a decline in volume and value of domestic tourism.
- Britons are forecast to be less well off [6]. The Institute for Fiscal Studies suggests that households in the middle of the income distribution will have lost about £10.60 a week by January 2013.

[5] http://www.visitengland.org/Images/Staycation%202010%20Debrief%20Presented%20by%20Olive%201st%20Oct_tcm143-197384.pdf

[6] http://www.bbc.co.uk/blogs/thereporters/stephanieflanders/2011/01/measuring_the_vat_squeeze.html

- Ambitions for growth. Visit England's strategic framework for tourism 2010-2020 aims for a 5% growth in value, year on year, over the next decade. Of particular relevance to this study, the Peak District has been identified as a Pathfinder Destination of Distinction by Visit England.
- Inbound visitors gradual recovery[7]. Visit Britain forecasts that inbound visitor numbers will show a growth of 1%, though visitor spending in 2011 will, in real terms, be around £0.5bn below the record level set in 2006.
- Shortbreaks - a solution for the time poor. Despite the economic downturn, society is still increasingly 'cash rich, time poor' with shifting patterns of trip taking to higher frequency shortbreaks.

Key points

- Domestic tourism is relatively buoyant and the trend for 'Staycation' holidaying is forecast to continue, in the short-term at least.
- Consumers will have less money to spend and will demand greater value for money and quality.
- Short breaks will be attractive to 'Extras' exploring the UK and to those who are time pressured.

2.1.2 Demographics and society[8]

- The UK's population is getting older
  The UK population is aging. It has widely been considered that this older generation is a powerful economic force, with sufficient disposable income to enjoy short breaks and regular holidays. However, recent economic events have affected pensions and the grey market may take a more cautious approach to spending than in previous years. This market may have specific needs in terms of facilities, accommodation and product offer.
- The family and party composition is changing and requires flexibility
  Families are shifting from being largely 'flat', with many members of a similar age, to families with a greater spread across the generations. Due to a high divorce rate, there is an increasing number of 'non-traditional' family units (i.e. single parent families, families with step-siblings). Spending time with groups of friends, extended families and interest groups is a primary motivation for a break or holiday.
- Widening younger markets, with greater economic power
  Young people are living at home longer and delaying marriage and parenting. The consequence is an increase in pre-family travellers. The delays in parenting also mean families are getting older (and more sophisticated and affluent). Similarly the empty nest market will less likely be 45+ but more likely to be 55, or even 60+.
- Tourism is becoming increasingly experiential

---

[7] http://www.visitbritain.org/Images/VisitBritain%202011%20Forecast%20Report_tcm139-198761.pdf

[8] www.statistics.gov.uk and ETC / UNWTO 2010 Demographic Change and Tourism and http://www.enjoyengland.com/Images/short%20breaks%20market%202006_tcm21-172123.pdf.

Tourists are looking for immersion in a culture, unique experiences, authenticity, exploration, adventure and personal fulfilment from their holiday experience. The 'what' is more important than the 'where'.

- Chameleon consumers
  Consumers are not only becoming increasingly fragmented, with markets more specialist and niched, but also changeable – i.e. the same individual may fall into one segment for one break and another later (e.g. a family holiday one moment and a mountain biking trip with friends the next).

Key points

- Flexibility is crucial to accommodate changing demographic requirements (in terms of booking arrangement, flexible start and finish dates, range and type of accommodation available)
- A range of diverse activities and products will best address some of the changing requirements of the consumer.

2.1.3 Environment

- The tourism industry will need to respond to climate change
  The tourism sector will need to respond to climate change, not only to progressively reduce and mitigate its greenhouse gas emissions and reduce water consumption, but also to adapt tourism businesses and destinations to changing climate conditions.
- Consumer demand for greener holidays[9]
  Visit England research has highlighted that over half of those surveyed expressed an interest in staying in accommodation with environmentally friendly practices, and a similar number are interested in breaks which benefit the local community. Over half of those surveyed would choose accommodation supplying local food or accommodation with a green award, if two hotels were otherwise the same. However, consumers are not generally prepared to pay more for a green option and being 'green' is not a real motivator for most people. In the Peak District, the National the Park Authority delivers the Environmental Quality Mark which will enable visitors to identify businesses that actively support good environmental practices.
- Peak oil: a tipping point for transport and fuel costs [10]
  Peak world oil production (the maximum rate of extraction, after which production declines) is estimated to be reached by 2020. There are implications for travel and tourism, both in terms of heating and fuel supplies and in terms of travel and transport (by road and by air). This points, potentially, to a greater reliance on domestic tourism and a rise in city breaks. Demand for rural breaks in remote areas

---

[9] VisitEngland Sustainability Consumer Research: http://www.enjoyengland.com/Images/Sustainabilty%20consumer%20research%20-%20March%202010_Layout%201_tcm21-186775.pdf.

[10] The Oil Crunch, A wake-up call for the UK economy, Industry Taskforce on Peak Oil & Energy Security (February 2010).

will need to be met by more efficient and better quality transport provision by the private sector.

Key points

- Going green will be less of a choice for tourism businesses and it will have to become more integrated in business operations, both in response to the implications of climate change and also in response to increasing consumer demand
- There will need to be a shift from private car use to public transport and better public transport provision. Energy and fuel efficiency will be an essential business requirement.

2.1.4 Technology

A fundamental innovation on the internet is social networking. It was not technology-led and it has been suggested that there may be no more major technical changes to come. But certainly there will be a huge range of new and more joined-up services. These will be driven by capacity improvements – speed and quantity of data transfer and processing. The major anticipated advances are summarised as follows:

- Online communication will go on growing, as it gets faster and more reliable
- Social networking will increase in importance. Online networks will be a vital channel for businesses for distribution, awareness creation and recommendations. Small businesses will be using technology and the personal touch to get the edge on their larger competitors, largely via social networking
- Convergence of devices is beginning to happen. PCs and phones are beginning to share their capabilities, and TV is not far away
- Convergence of tourism services. Already new travel planning services are emerging such as Gliider, Tripbase, Jetsetter, Traxo and TripIt
- Communication on the move will become commonplace. Smartphones will be the point of first contact for most communications, including tourism searches, enquiries and bookings. Smartphones will have implications for visitor planning while on the move, and will also have implications for the way they experience visitor attractions
- Information exchange is crucial. Websites are important, but it will equally be important to be listed on other web pages
- Big multi-national companies are an opportunity, not a threat. Firms like Google, Apple and Expedia will control the channels and the content, as they do in most walks of life - but small businesses will still be able to improve their visibility even further.

Key points

- Technology changes are less likely to impact on the scale of tourism demand but will have implications for communication and booking processes. The big advances are around convergence, mobile devices and social networking

- A web presence and a good website is an essential part of marketing. Visitors want to be able to see the rooms, attractions and places that they will be staying in and visiting and also get an idea of what other services, attractions, facilities and so on are available locally
- User generated content on the internet should be encouraged in order to provide potential visitors with recommendations from past users. Recommendations, both good and bad, on websites such as TripAdvisor are now more trusted by consumers than traditional marketing materials such as brochures and official destination websites.

2.2 Key trends particularly relevant to the Staffordshire Moorlands

2.2.1 Rise in popularity of experiential tourism

There is little data readily available for the following activities; nevertheless the following figures do give us some indication of recent trends.

- Boating. According to British Waterways (BW) Annual Report (2009-2010)[11], in 2009 an estimated 13 million people, or 28% of the GB adult population, visited a UK waterway, up from 11 million in 2008. The BW marketing campaign has played its part in attracting more people, but other factors such as the weather, the economy and trend for 'Staycations' also had a significant impact. Despite the economic downturn, the number of boats on all BW canals and rivers has increased by 3% with 34,944 boats licensed (up from 33,831 in 2008/09).
- Walking. According to the Ramblers Association[12]:
    - A comprehensive survey of sport and recreation participation shows that 9.1million adults in England, or 22% of the population, walk recreationally for at least 30 minutes every four weeks
    - The popularity of leisure walking appears to be rising. The number of English adults walking recreationally for at least 30 minutes every month increased by 954,700 (around 10%) between 2006 and 2008
    - Walking is the joint most popular activity, along with eating out, for people taking days out in England, and the most important reason for 18% of the 3.6 billion trips per year. It is the main activity on 36% of countryside and 33% of seaside visits and the most popular activity for UK visitors to Scotland and Wales.
- Cycling. In the last 12 months up to September 2010, British Cycling Membership increased by 16% to 33,000 members in total. The new Ride membership for non racing cyclists has played a significant role in the rise of numbers and has proved the perfect alternative to the Race memberships of, Gold, Silver and Bronze. In the first year of its inception, 3,000 people have already signed up to 'Ride'[13].
- Horse riding. 2.1 million people ride at least once a month, with a further 2.2 million riding less frequently, with the implication that as well as the solid core of regular

[11] http://www.britishwaterways.co.uk/media/documents/Annual_Report_and_Accounts_2009-10.pdf

[12] http://www.ramblers.org.uk/Walking/policy/caseforwalking/participation.htm

[13] http://www.britishcycling.org.uk/zuvvi/media/bc_files/corporate/BC-ANNUAL-REPORT-2010-WEB.pdf

riders, there is large potential for growth. The fastest growing group are women aged 25 - 44 years old, with a slight increase in the number of men taking up horse riding[14].

- Climbing. In 2009 there was positive growth in individual membership of the British Mountaineering Council. At year end they had 46,852 individual members, an increase of 5,565. BMC had 71,112 combined individual and club members at year end. This is 3,558 more than in 2008. Total membership was made up of 46,852 individual members and 24,260 club members split between 238 clubs and 57 student clubs, a total of 295 clubs. This is a decrease of 12 clubs for the year.[15]
- Golf. According to English Golf Union 2010 Golf Club Membership Questionnaire Results[16], membership levels have been in decline since 2004. 22 clubs in Staffordshire report that they have membership vacancies. In response to this decrease the EGU are supporting golf clubs to adapt and become more proactive in their approach to membership by offering more flexible packages and opportunities. The only age category to experience an increase in membership numbers is the 71 years + group and it is vital that golf clubs recognise the needs of each specific age group.
- Food and drink. UK consumers' shopping habits and cooking and eating patterns demonstrate an increasing interest in the taste, quality and origin of food. In particular, there is an increased demand for local and regional foods. The diversity of products in shops and on menus is greater than ever before[17]. 70% of British consumers want to buy local and regional food and 49% – every second person – want to buy more local foodstuffs than they do now[18].
- Some salient points can be highlight from the Visitor Attractions research, in particular the popularity of relevant attractions such gardens, and the increased in day trippers.
- This trend is reflected in the success of local businesses in the Staffordshire Moorlands District. For example, Peak Pursuits report an estimated 40% increase in visitor number over the past 5 years with an increase in revenue over the same period. Their investment plans beyond 2011 are to add sailing and rowing boat hire to their offer as well as their own accommodation.

Key points

- Most informal outdoor recreational activities appear to be increasing in participation giving some confidence to those who considering investing in businesses related to these activities

---

[14] British Horse Industry Confederation http://www.bhic.co.uk/about/pressarchive/news.php?4

[15] British Mountaineering Council http://www.thebmc.co.uk/bmcNews/media/u_content/File/your_bmc/annual_reports_and_accounts/Annual%20Report%20FINAL%2009.pdf

[16] http://www.englishgolfunion.org/showpage.asp?code=0001000100010026

[17] Cabinet Office, 2008 Food Matters: Towards a Strategy for the 21st Century

[18] IGD Report, March 2005

- Today's changeable consumer will welcome a destination where a critical mass of different experiences are available from which they can pick and choose at an appropriate level of engagement to suit their needs.

2.2.2 *Accommodation*

According to UKTS data, in the period 2006-2009, there have been a number of significant trends in England with regards to accommodation. In particular:

- Self catering trips have increased 22.4%
- Hotel / motel trips have increased 7.6%
- Camping and caravanning has increased 14.5% camping has seen the greatest increase in the sector (16%)
- Guesthouse trips have decreased 10.8%.

Key points

- The decrease in guesthouse trips may be accounted for by the increasing popularity of budget hotels such as the Premier Inn
- The increase in self-catering accommodation use may be because it is perceived as a budget option, and also allows the visitors freedom and flexibility
- The camping sector is also witnessing some qualitative changes, and in particular the popularity of diversifying the offer through the 'glamping' experience (e.g. yurts, tipis, camping pods).
- The exceptional performance in 2009 for both self-catering and camping will have benefitted from the recession effects and therefore the upturn may be short term rather than a more fundamental trend. These figures should be viewed with some caution as UKTS year to date figures indicate declines in volume and value across many sectors.

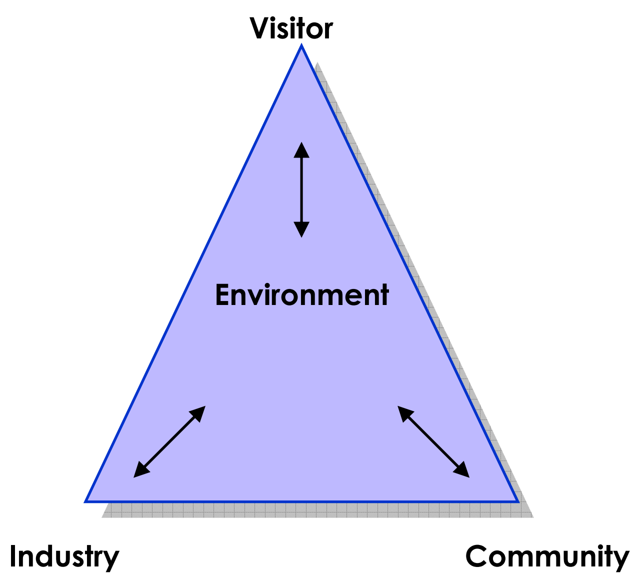
3. Sustainability

The sustainability agenda fits well with the Peak District offer and consumers are increasingly interested in businesses which are run on responsible and environmentally sound principles. For businesses, the environmental agenda should be viewed as an opportunity and not as a threat, nevertheless, tourism is first and foremost an economic activity and must make sound sense in terms of profitability and competitiveness. While it is a matter of debate as to the extent to which consumers are prepared to pay a premium for environmental practices in the businesses they choose, they may well expect this as part of the Peak District offer (with its National Park related brand) and choose businesses which are evidently green over those that are not. For businesses becoming more sustainable, or 'Going Green' in the eyes of the consumer, it may not only provide a point of differentiation for their customers, but may also offer cost saving opportunities.

3.1 The VICE model: a key concept for sustainability

The VICE model, illustrated below, presents sustainable tourism as the interactions between the visitors, the industry that serves them, the community that hosts them and the environment where this interaction takes place. The last of these, the environment, can be understood in its broadest sense to include built as well as natural resources on which many tourism products are based.

The VICE model



Source: English Tourist Board and Tourism Management Institute (2003)

According to this model, it is the role of destination managers and planners to work through partnerships and a joint destination management plan in order to:

- Welcome, involve and satisfy **Visitors**
- Achieve a profitable and prosperous **Industry**

- Engage and benefit host **Communities**
- Protect and enhance the local **Environment**.

The model can be used as a quick check of the sustainability of a proposed plan or action. Four questions should be asked and these could be subdivided into a list of sub questions:

- How will this decision affect the visitors?
- What are the implications for industry?
- How does this affect the community?
- What will be the impact on the destination's environment and/or culture?

If positive answers cannot be given for all four questions, then the right balance has probably not been found and the proposition is unlikely to be sustainable. According to this model, sustainable tourism includes any level of tourism development, mass or niche, and in any sector.

3.2 Huge leaps and small steps

Advancing the tourism sector towards sustainability may be broken down into two areas, considered in terms of Huge Leaps and Small Steps[19]. The small steps will drive continual improvement and focus on continuing to do what you do, but doing it better, while huge leaps will realign business along ecological lines. Almost by definition, these huge leaps may present a greater challenge for businesses to implement. However, it is in these the broader and more fundamental actions where, potentially, the more radical implications for the wider sustainability debate and the greening of the sector may occur.

The small steps which businesses can take to improve their sustainability will be focussed around the following:

- Waste minimisation and recycling
- Energy efficiency
- Local sourcing
- Encouraging public transport use
- Working with and involving the community in which they operate
- Increasing biodiversity.

These steps can be encouraged by schemes such as the Peak District Environmental Quality Mark, which allow customers to identify businesses which are actively supporting good environmental practices and making choices on this basis. The EQM will be the green tourism scheme for the area and national accreditation is pending.

[19] Kane, G. (2010) The Three Secrets of Green Business: unlocking competitive advantage in a low carbon economy, Earthscan, London

In terms of huge leaps, tourism businesses can realign their business along ecological lines through:

- New builds and extensions of ‘green’ buildings
- Aligning product to ‘greener’ markets
- Green procurement (less product, ‘better’ products and suppliers)
- Switching to renewable energy, and
- Combining many of the actions listed above with the aim of becoming a carbon neutral business.

However, huge leaps are most likely to occur at the destination level. There will be two key issues at destination level to be addressed, focussed around making a modal shift for transport choices and moving towards carbon neutrality. Small steps will focus around supporting businesses through the accreditations schemes mentioned above, and by implementing other smaller scale initiatives such as visitor stewardship schemes.

(See Appendix 2 for case studies)

Part two: Situation and market analysis

This section provides a situation and market analysis of the Staffordshire Moorlands and provides the context in which any tourism products will be developed. This consists of accommodation supply, economic impact, attractors and current and potential markets.

4. The Staffordshire Moorlands – Tourism Context

4.1 Overview

The Staffordshire Moorlands has over 300 accommodation operators; accounting for over an estimated 5,500 bed-spaces and caravan pitches (see section 4.2). Tourism is estimated to generate £158m of expenditure directly into the local economy, supporting (directly and indirectly) nearly 3,500 jobs (see section 4.3).

In terms of image and product, the district boasts two tourism brands of genuine national significance – Alton Towers and the Peak District, supported by a range of more modest, but nevertheless important, attractors including the pleasant market town of Leek, the industrial and natural history interest of the Churnet Valley, the Churnet Valley heritage railway and the Caldon canal (see section 4.4). However, Staffordshire Moorlands District does not operate as a single tourism destination or brand. In addition, there are no large well-known towns to act as a focus and provide national profile (e.g. an equivalent to Buxton or Bakewell).

In terms of location, Staffordshire Moorlands is situated in the centre of England and is potentially accessible to a huge population – part of the reason for the popularity of Alton Towers and the Peak District. However, the District itself is not easily reached by road and public transport. With the exception of the A50 in the south of the District, roads are relatively slow and difficult. There is currently no rail link into the District. Car is the predominant form of transport for visitors (albeit the Staffordshire Moorlands is by no means exceptional in this respect) and only Alton Towers differs in this respect with approximately a fifth of visitors arriving by coach.

In terms of a location for short break holidays, where rapid road access is of lesser significance, then the area has a number of great advantages. It is within 2 hours drive of the major conurbations of the North West, Midlands and East Midlands and even London is under 3 hours drive.

In terms of day trips, the area is quite heavily used by those from the Potteries, the nearest urban centre, but is an awkward drive from the Manchester or Birmingham areas, although it can be reached in 1 to 1.5 hours from each. The Derby and Nottingham urban populations have access to similar and competing areas in the south east Peak District for day trips.

4.2 Accommodation supply

The following table summarises the number and approximate distribution of accommodation **establishments** and **bed spaces**.

Accommodation Stock in Staffordshire Moorlands								
Number of establishments								
	Alton Towers area[1]	Biddulph	Cheadle area	Churnet Valley	Leek	Leek area[2]	Peak Park	**Total**
Serviced - under 15	17		6	12	8	9	16	**68**
Serviced - 15+	9		4	2	2	2	2	**21**
Hotel	2							**2**
Self catering	18	3	10	17	3	27	120	**198**
Caravan	2		2	1		6	5	**16**
Total	**48**		**22**	**32**	**13**	**44**	**143**	**302**
Number of bedspaces[3]								
	Alton Towers area	Biddulph	Cheadle area	Churnet Valley	Leek	Leek area	Peak Park	**Total**
Serviced - under 15	116		42	69	75	50	87	**439**
Serviced - 15+	169		104	45	35	50	69	**472**
Hotel	1672							**1672**
Self catering	201	12	68	128	11	120	677	**1217**
Caravan	552		101	112		380	529	**1674**
Total	**2710**		**315**	**354**	**121**	**600**	**1362**	**5462**

Notes:
1. Alton Towers area – this includes not only the Alton Towers resort but also the area immediately surrounding it including Alton, Farley, Oakamoor, Hollington, and Wootton.
2. Leek area includes villages like Bottomhouse, Winkhill, Bradnop and Cauldon that sit on the edge of the National Park.
3. This table contains both registered and unregistered accommodation operators. Data is more limited on unregistered stock and assumptions have been made in relation to the number of bedspaces. A self catering unit has been assumed to have 4 bedspaces, and a small serviced establishment 6 bedspaces

Source: TEAM Tourism, based on data provided by Staffordshire Moorlands District Council – accommodation audit (November 2010)

There are over 300 accommodation operators in Staffordshire Moorlands accounting for nearly 5,500 bedspaces. Of these 142 (47% of establishments) are unregistered and these account for approximately 620 bedspaces (11% of the bedspaces).

In terms of accommodation supply:

- The majority of establishments are self catering – 66%. A further 23% is also small serviced establishments (with less than 15 bed spaces). There is an absence of larger (30 rooms+) serviced establishments (there are only 5 in the district) and/or branded, chain run establishments

- A significant proportion of establishments are located in the Peak District (47%), with a number located just outside the Park (under the Leek area in the table above)
- The area immediately around Alton Towers accounts for 16% of the establishments but 50% of bed spaces. The two hotels in Alton Towers alone account for 31% of the district's bed spaces
- Outside the Peak Park and Alton Towers area, there are no major concentrations of accommodation – the area around Leek has just over 40 establishments – many of these in close proximity (but not actually in) the Peak District National Park. In particular there is a lack of provision in Leek and Cheadle town centres.

4.3 Economic Impact

The Staffordshire Moorlands Tourism Economic Impact Assessment 2009, conducted by The Research Solution in 2010 and using the Cambridge Model, highlights:

- Tourism generated **£158m of expenditure** directly to the local economy in 2009
- That this expenditure (plus indirect and induced multipliers) supports **3,495 jobs**. In terms of the direct expenditure, there were 2048 FTEs supported by tourism spend – this equated to 2,995 actual jobs
- There were an estimated **3.35m trips** to the Staffordshire Moorlands in 2009. 93% of these are estimated to be day trips
- There were an estimated **239,500 overnight trips** to the Staffordshire Moorlands in 2009 – 70% of these were in commercial accommodation and 30% staying with friends and relatives. These trips accounted for **819,400 nights**.

Of staying trips (not nights) in commercial accommodation, it is estimated:

- 51% were in hotels (85,600 visits)
- 18% in self catering (30,900 visits)
- 24% in touring caravan / tents (41,300 visits)
- 7% in 'other'.

Our estimate is that Alton Towers directly (i.e. not including off site stays in other accommodation) will be generating approximately 50% of overnight trips to the Staffordshire Moorlands.

NOMIS data, relating to employment, indicates that tourism related industries account for over 10% of Staffordshire Moorlands employment[20]. As such, it represents a significant part of the local economy.

---

[20] The exact figures fluctuate - 13.7% in 2007, 10.6% in 2008, and 7.6% in 2009. Current direct and indirect job estimates (from the Cambridge Model represent about 6% of the working age population. If these are increased to more adequately represent the impact of Alton Towers, they would probably correlate with the level indicated by the NOMIS figures.

The District is effectively characterised by a two tier visitor economy:

- Alton Towers – the flagship of the UK's largest attractions operator, Alton Towers generates huge amounts of visits, spend and employment. However, much of this is concentrated on the immediate site
- There are a significant number of small or micro operators which account for the vast majority of tourism related businesses. Individually they are not significant employers but collectively do generate significant economic impact that is felt widely through the local economy.

4.4 Attractors

Staffordshire Moorlands has a complex offer and a number of main attractors. It can be divided into a number of distinct areas – these have different offers, opportunities but also markets (see section 5). The following table summarises the key strengths and weaknesses of these areas in tourism terms.

Area	Major Strengths	Major Weaknesses
Peak District National Park	• A national tourism brand • High landscape quality • Recognised quality walking location • Infrastructure for other activities – e.g. rock climbing, cycling • Attractive villages with pubs • Concentration of smaller accommodation establishments	• Planning restrictions on development • Limited capacity of the landscape to accept new developments • Little awareness of Staffordshire as part of the Peak District • Issues of capacity in key areas (e.g. access at the Roaches)
Alton Towers	• National tourism brand • Significant visitor numbers (in the region of 2.5 m) • Significant hotel accommodation • Conference venue • Significant employer • Spin off in terms of overnight stays and a motivator as part of a wider visit.	• Most expenditure retained in the resort • Entry to Alton Towers is for the whole resort, there is no opportunity to access the park and gardens only, which restricts growth for older / non-family visitors • Traffic generation and management
Churnet Valley	• Intimate attractive landscape	• Relatively difficult to access by

Area	Major Strengths	Major Weaknesses
	• Industrial heritage based on railways and canal • Natural environment sites • Medium sized attraction – notably the Churnet Valley Railway and a number of smaller attractions such as Cheddleton Flint Mill • Recreational routes – Caldon Canal, Staffordshire Way • Major development opportunities – Moneystone Quarry, Bolton Copperworks • Wooded - so can potentially absorb developments	car with poor roads • Relatively unknown • Limited accommodation • Environmental sensitivity of some sites
Leek	• Interesting old industrial town with some fine buildings • Association with antiques • Markets and independent retail	• Some public realm improvements required • Limited accommodation • No major attraction and requires change in orientation of retail and catering to become more attractive in tourism terms.
Cheadle area	• The St Giles RC Church • Foxfield Railway • Links to Churnet Valley	• Lacking profile • Traffic congestion • Poor urban environment in parts, and not particularly tourism orientated
Biddulph	• The National Trust garden at Biddulph Grange • Biddulph Grange Country Park known locally for fishing and country walks, Folk in the Park a key event	• Low profile town with limited visitor potential • Biddulph Grange Visitor Centre struggling to attract visitor numbers and sustain itself
Inland water (Rudyard Lake and Tittesworth	• Attractive landscape settings • Water sports potential	• Parking is poorly signposted • Primarily a relatively local

Area	Major Strengths	Major Weaknesses
Reservoir)	• Fishing • Walking potential • Rudyard Lake railway	audience

Thematically these attractors can be summarised under the following headings which cut across geographic locations:

Theme	Key sites
Countryside and outdoor activities (walking, hiking, cycling, watersports, riding, climbing etc.)	• These are undertaken within the Peak District National Park and can also take place in other country parks, nature reserves, National Trust land and scenic locations in the district (e.g. the Roaches, Biddulph Grange Country Park, Tittesworth reservoir, Greenhays Bank Country Park, Consall Country Park, Rudyard Lake, Manifold Valley, Cowall Moor, Mow Cop, Coombes Valley Nature Reserve, Dimmings Dale, Cloud National Trust Land, Wetley Moor, Deep Hayes Country Park, Hawsmoor Wood National Trust land)
Heritage attractions including heritage railways, canals and other industrial heritage	• Churnet Valley, Cheddleton Flint Mill, Froghall and Churnet Valley Railway, Ecton Copper Mine, Froghall Wharf, Brindley Mill in Leek, Manifold Valley and Visitor Centre at Hulme End
Fun family days out	• Primarily Alton Towers, Churnet Valley Railway, Foxfield Railway, Kingsley Bird and Falconry Centre, Blackbrook Zoological Park
Churches	• St Giles RC, Church at Cotton, Church at Rushton Spencer, St Wilfreds in Cotton, Ilam Church, Leek Parish Church
Gardens	• Biddulph Grange National Trust, Consall Hall Gardens, Alton Towers grounds
Shopping and browsing	• Leek – markets, antiques and independent retail
Food and drink	• E.g. Lazy Trout (Meerbrook), Three Horse Shoes Inn (Nr Leek), George Inn (Alstonefield), other numerous pubs and tearooms
Arts and crafts	• Leek, Longnor Village, Alstonefield craft centre, Threshing Barn (outside Leek)
TV / film locations	• Longnor Village, Dovedale

5. Current and potential markets

5.1 Overview and area variations

Staffordshire Moorlands' visitor markets, reflecting its product and area variations (see section 4.4) are relatively diverse – they vary by the different areas across the District.

The following key points can be highlighted in relation to the District's leisure visitors[21]:

- The majority of visitors are **day trip visitors**
- Staying visitors are typically on a **short break** or additional holiday (as opposed to a main holiday). Average length of stay is around 4 nights
- The majority of visitors (over 80%) have **been to the area before** – about three quarters (74%) of staying visitors have been before
- Day visitors are typically **from Staffordshire** itself (about two thirds), and most notably the Potteries. Other areas include Cheshire (10%), Derbyshire (7%) and the rest of the West Midlands (6%)
- Staying visitors are coming from much further afield – approximately two-thirds are from **outside** the West Midlands region and surrounding counties (Cheshire and Derbyshire)
- In terms of the type of party visiting the Staffordshire Moorlands, this was typically **couples** (50%) but there was also a high proportion of families (27%) and groups of friends (11%)
- Visitors were more likely to be **middle aged** (19% were 55 to 64 years old) than any other age. They were less likely to be secondary school / young adult age (i.e. 10-24 years old). Approximately a quarter (23%) of visitors were children under 18
- There were **variations between day and staying visitors** – day visitors had a slightly older profile (34% were 55+ compared to 23% of staying visitors). Staying visitors were more likely to be of family age (33% were 35-54 compared to 23% of day visitors) with a higher proportion of children (28% were under 18, compared to 21% of day visitors)
- Visitors were most likely to be from **C1 socio-economic groups** but this varied between day and staying visitors. Staying visitors were typically ABC1 (73%) whereas day visitors were more likely to be C1 (35%) and DE (38% - a function of the higher proportion of pensioners among day visitors).

There are variations by areas within the Staffordshire Moorlands – see table below:

Area	**Visitor Characteristics – variations from the average District pattern.**
Alton Towers[1]	• Alton Towers was attracting a higher proportion of staying visitors than other areas of the district. They were more likely to stay in serviced accommodation. Average length was lower than the rest of district – about 2 nights compared to over 4 nights elsewhere • A higher proportion of first time visitors – about a third were coming for the first time

[21] This analysis is drawn from Staffordshire Moorlands Visitor Survey (HETB - 2003) and West Midlands Regional Visitor Survey (HETB and RJS Associates - 2002)

Area	Visitor Characteristics – variations from the average District pattern.
	• A higher proportion travelling by coach – less by car • The primary activity of the trip was to visit an activity. Secondary activities were limited compared to visitors in other parts of the district – typically eating out (15% of visitors – some or all of which could be contained on the Alton Towers site) and general sightseeing (11% of visitors) • Visiting parties contained a higher proportion of groups of friends • Visitors were more likely to be C1s (59%) and less likely to be AB (7%) • They had a younger age profile – common age groups were 19-24 (28%), 25-34 (18%), and 35-44 (12%) – 32% were under 18 • Alton Towers had the **least local** visitor profile - Alton Towers had the least local audience – only 18% of visitors were from Staffordshire, and Derbyshire. 55% were from outside the Northwest , East and West Midlands and day visitors were likely to be travelling significant distances.
Peak District[2]	• Visitors used a wide range of accommodation – typically B&B, self catering, caravan and camping, but not hotels • The main activities of visitors were varied and included sightseeing (28%), walking less than 3 miles (28%), hiking more than 3 miles (23%), leisure cycling (9%). Other or secondary activities were also wide ranging and popular ones included sightseeing (78%), walking (43%), eating out (33%), hiking (25%), and visiting villages/market towns (31%) • Visitors were typically AB (26%) and C1 (38%) • Age profile was most commonly 55-64 (19%), followed by 46-54 (16%) and 36-45 (15%). 21% of visitors were under 18 • There was a higher proportion (88%) of repeat visitors – 60% of visitors were Staffordshire, Cheshire and Derbyshire (reflecting the importance of the day visitor market)
Leek and surrounding area[3]	• The **main** activities by visitors included sightseeing (38%), shopping (20%), visiting an attraction (15%). Secondary activities were varied - sightseeing (57%), eating out (40%), shopping (33%), walking (26%), visiting an attraction (19%) • Visitors were typically C1 (30%) and DE (55%) • Age was varied - was quite varied – commonest was 55-64 (22%), 65+ (16%), but also young families (33% were 25-44 and 14% were 0-9). • Visitors were relatively local – 58% from Staffordshire alone.
The Churnet Valley[4]	• Visitors were more likely to be visiting he are for the first time • The main visitor activities included sightseeing (25%), attraction (16%), or an event (10%). Other activities included sightseeing (70%), visiting an attraction (48%), walking (36%), eating out (34%), visiting villages

Area	Visitor Characteristics – variations from the average District pattern.
	and market towns (25%), hiking (25%), an event (23%), and leisure cycling (9%) • The Churnet Valley attracted a slightly lower proportion of couples (40%) and slightly more family (30%) and friends (14%) groups • Visitors were typically AB (20%) and C1s (39%). They tended to be middle aged – i.e. 55-64 (24%) and 45-54% (23%). Only 17% were less than 18 years old • The market was relatively local 55% of visitors were Staffordshire itself.
Biddulph[5]	• The main activities were visiting an attraction (38%), or walking less than 3 miles (23%) • Visitors tended to be in couples (64%). Their age profile was older than elsewhere –i.e. 65+ (27%) and 55-64 (37%), and only 7% were less than 18 • Biddulph had the most local market – 63% were from Staffordshire • Visitors were mainly DEs (71% -reflecting the high proportion of pensioners in the visitor profile.)

Source: Staffordshire Moorlands Visitor Survey – 2003

1. Interviewing took place at Alton Towers only

2. Interviewing took place at a range of sites – including Alstonefield Village, Dovedale, Ilam, Longnor, Manifold Valley, The Roaches, and Tittesworth Reservoir.

3. Interview locations included Blackbrook World of Birds, Brindley Mill, Leek and Rudyard Lake.

4. Interviewing took place at Cheddleton Mill, the Churnet Valley Railway and Froghall Wharf

5. Interviewing took place at Biddulph Grange and Bidddulp Country Park

NB: for the Cheadle area, interviews only took place at Foxfield Railway and are not likely to be representative of the whole area.

5.2 Segmenting the current and potential market

There are number of ways potentially to segment the tourism market place of a destination – by visitor type (day, staying etc), demographics (origin, age etc), motivations and activities, values (e.g. the ArkLeisure segmentation) or a combination of different factors. Rarely does available data allow an approach to be wholly scientific.

Work TEAM Tourism undertook for VisitEngland, as part of the development of the England Tourism Marketing Strategy, identified a number of generic segments based on key motivations – these include Party Fun, Family Fun, Discovery/Enrich, Active, Rest/Chill, Luxury/Pamper, and Occasion/Celebration. These can be applied to the Staffordshire Moorlands to provide a framework for market segmentation for discretionary markets – i.e. those choosing to visit the area rather than having to like some business tourism and visiting friends and relatives markets.

The following table summarises the District's main markets – those that are currently coming and probable future markets, assuming no major changes in the product offer.

Segment	Characteristics and growth potential	Areas of the District	Current Relative market importance to Staffordshire Moorlands (5*=most important)
Business Tourism			
Conference and meetings	Day and staying conferences – typically visiting midweek. Alton Towers is the primary venue and accommodation base in the District. More modest and niche markets would be Party House and the role of Peak Pursuits in corporate team building.	Alton Towers	**
Day Visits (leisure)			
Family Fun	Fun day out with the family – typically visiting an attraction. Alton Towers is the primary attraction (accounting for the vast majority of visits) although this market group may visit some other attractions in the district (albeit in considerably lower volumes). The Alton Towers group will be pre-dominantly C1 with children of all ages (from pre to secondary school) and travelling from a wide catchment. This group will generally stay at Alton Towers with limited activity elsewhere in the district. The 'family fun' market found elsewhere in the district is more likely to be local (most typically from Staffordshire) with a higher proportion of younger (pre-secondary school) children. They may undertake some secondary activities in the district – eating out, walking etc.	Alton Towers mainly	*****
Party Fun	Adult groups – fun is the main motivation. Typically younger adults (C1C2DE) travelling as couples or groups of friends.	Alton Towers	****

Segment	Characteristics and growth potential	Areas of the District	Current Relative market importance to Staffordshire Moorlands (5*=most important)
	This segment will be predominately based around Alton Towers and will be coming from a wide catchment area. They are unlikely to undertake activities elsewhere in the District.		
Discoverers	Visitors coming for attractions and sightseeing experiences, including heritage and natural history – predominately couples but some **families**. Characteristics of this group will vary according to specific sites and attractions but in general terms they will be ABC1 and typically from Staffordshire. This segment will be found throughout the district but concentrated on specific points – Peak District, Leek, Churnet Valley, and specific attractions in the Biddulph and Cheadle areas.	Whole district (ex Alton Towers)	***
Actives	These are visitors coming for outdoor activities. The primary ones are walking, hiking and cycling but others will include riding, watersports and climbing. Elements of this segment will relatively 'captive' – visiting regularly for their activity (e.g. watersports, riding). Others will be more footloose. Levels of engagement will also vary from beginners/casuals to enthusiasts. Visitors will typically be from	Peak District mainly but also Rudyard / Tittesworth and the Churnet Valley	***

Segment	Characteristics and growth potential	Areas of the District	Current Relative market importance to Staffordshire Moorlands (5*=most important)
	Staffordshire and ABC1. They are likely to be visiting with children (although families are a part of this group). This segment will be concentrated on the Peak District but found elsewhere – Churnet Valley		
Treat – shopping / eating out	This group will be visiting for a treat / indulgence (albeit possibly a relative modest one) such as a shopping trip or eating out. It will be a local market (more so than other markets), typically visiting without children. It will be concentrated on urban areas – particularly Leek.	Leek and to a lesser extent Cheadle	*
Staying visits (leisure)			
Family Fun	The staying version of the same day visitor market. Alton Towers will be the primary motivation to visit. Length of stay will be relatively short (around 2 nights) and typically in serviced accommodation. This maybe at Alton Towers or in the surrounding area (including outside the District). This segment may overlap with family elements of the 'Countrysiders' group (see below) to an extent – the differentiator will be the influence and role of Alton Towers in the trip. Countrysider families that visit Alton Towers will be likely to stay for longer and undertake a wide range of activities, including	Alton Towers But also staying in relatively low concentrations elsewhere	**

Segment	Characteristics and growth potential	Areas of the District	Current Relative market importance to Staffordshire Moorlands (5*=most important)
	heritage and natural history.		
Party fun	The staying version of the same day visitor market – this is an Alton Towers segment, although visitors may stay in the surrounding area.	Alton Towers	*
Countrysiders	Primarily coming for a combination of experiences – activities, discovery / sightseeing, and rest and relaxation. Outdoor activities will be the predominate activity but the natural environment / scenery will be a key underpinning appeal. They will however undertake a range of activities while staying in the area including heritage and natural history and will have a propensity to travel around / explore. They will be staying for an additional holiday / short break – typically in independent accommodation (B&B, self catering) – typical length of stay will be 2 to 3 nights or 6 to 7 nights. Demographically they will be primarily be middle-aged ABC1 couples – travelling from a wide area.	Primarily staying in the Peak District but will travel to other parts of the District (and beyond it)	****
Special interest segments	The district will attract a number of special interest groups. These will typically be relatively small groups – they will include: • Canal boaters		*

Segment	Characteristics and growth potential	Areas of the District	Current Relative market importance to Staffordshire Moorlands (5*=most important)
	• Industrial heritage, including heritage railway enthusiasts • Natural history		

5.3 Market Positioning and opportunities

The Staffordshire Moorlands currently contains a number of tourism destinations or brands – specifically Alton Towers, Staffordshire, the Peak District and the Potteries. It is currently marketed under the umbrella of both Staffordshire and Peak District brands.

Alton Towers is a strong national brand that transcends the area – it stands by itself. It does participate in both Peak District and Staffordshire campaigns.
However, its relationship with the surrounding area is not necessarily strong. In simple terms, it generates significant direct on-site spend and subsequent local employment, and generates a significant number of bed-nights (typically serviced) in the surrounding area, both in the district and beyond. While there is some other off-site spend, typically eating out, Alton Tower's visitors do not typically engage in the range of activities that other visitors do (see section 5.1) and are less liable to venture into other areas of the District.

The Staffordshire and Peak District brands are complementary rather than conflicting – they have different appeals and positioning in the market place.

The Staffordshire brand is more aligned to an Alton Towers visitor profile. Its target audiences are primarily families but also empty nesters – typically day visitors, albeit there is an aspiration to open up staying markets as well. Assets are its location, attraction product and, to a lesser extent product range. Marketing is predicated around its Adventure / Nature / Culture offer; however, as a brand it will be weaker than the Alton Towers brand.

The Peak District is a strong national brand – it is identified as one of the UK's primary short break or holiday destinations. It is also a substantial day visitor destination. Its appeal is, not surprisingly, aligned to a 'Countrysiders' type of segment. It is a stronger destination brand than Staffordshire. VPD need to continue to incorporate Staffs and Staffs Moorland in their marketing and promotion particularly the Churnett Valley and Leek.

The Potteries sits adjacent to the Staffordshire Moorlands. The Potteries has an appeal based on its unique industrial heritage and retail experience. It is a strong day visitor destination (either from home or a holiday base) but will have a weaker appeal in staying markets. There is limited scope to align the Staffordshire Moorlands with the Potteries in branding terms. However there are opportunities in relation to the Potteries:

- The Potteries offer the opportunity of a day out from a holiday base in the Staffordshire Moorlands – part of a wider itinerary of activities
- The Potteries is a key generator of day visits for the Staffordshire Moorlands.

The Staffordshire Moorlands, in its own right, does not function as an integrated destination – consequently it is not a brand or consumer proposition. It is, in our view, right that it is marketed under the umbrella of both the Peak District and Staffordshire. As a consequence the move away from a 'Staffordshire Moorlands' proposition to one of 'Staffordshire's Peak District' is the right one, albeit we would suggest that the proposition of Staffordshire's Peak District could be market tested with consumers before its wide scale adoption for marketing purposes.

Part three: Product development

In this section we deal with product development and some specific ideas that can help to develop the visitor economy of the District and the Churnet Valley in particular.

6. Context and overview

Tourism is a key part of the local economy and the District has the following significant assets:

- A huge catchment population
- Two national brands/destination products – Alton Towers and the Peak District
- The significant potential of the Churnet Valley corridor.

Staffordshire Moorlands attracts a number of markets and has a number of relatively distinct 'tourism zones' (see section 4.4) – these have different offers and attract different markets (see section 5.2). Interrelationships between these 'zones' are often weak – particularly between Alton Towers and the rest of the District. This is partly due to the poor internal communications and access within the District. In the case of Alton Towers it is due largely to the scale of onsite activities and the relative lack of thematic linkages to the rest of the district (i.e. there is not much to pull Alton Towers' markets off-site, especially if they are visiting for the day or a night).

At present, there is likely to be modest growth potential from the District's current markets. They would be likely to support some further small scale developments – either accommodation (self catering, small serviced units, and possibly budget hotels) or attraction and activities linked developments. The latter would be likely to be modest in scale in terms of visitor numbers (possibly up to 50,000 p.a. in the right location). New developments should be aligned to the potential interests of Countrysiders (heritage, culture and outdoor activities) to maximise benefits from the established Peak District brand, but also strengthen its offer. Changing consumer demands may create the market for new product types and qualitative improvements but this may be either displacement or improvement and local investment driven

We suggest that potential product development opportunities are viewed in two ways: **transformational** projects and **supporting** projects and actions:

- **Transformational projects**

These projects are those that provide the potential for a step-change in the tourism offer and they would be more catalytic and can transform the visitor economy of the area. These transformational projects could have a significant impact on the tourism economy of the District, either in terms of direct impact or in terms of catalysing wider development. These are:

  - Churnet Valley Railway developments and the rail link to Stoke on Trent
  - Moneystone Quarry development as a holiday and activity resort
  - Bolton Copperworks and its potential to link together the railway and the canal basin and build on the industrial heritage interest of the Froghall area
  - Cornhill, Leek

- **Supporting projects and actions**

These are projects and actions which would add depth and critical mass to either existing markets, or new markets and products. They would also enhance the overall attractiveness and appeal of the District. However, in their own right their individual impact, whilst potentially worthwhile, is likely to be relatively limited. These projects are underpinned with cross-cutting actions that enhance the overall quality of the visitor experience and provide a context for the transformational projects. These support projects include:

  - Making more of Leek
  - Enhancing access to the area and connectivity within it
  - Developing new and improving the existing major attractions / attractors
  - Encouraging and promoting more events
  - Enhancing the accommodation stock
  - Going Green
  - Retail.

7. Transformational Projects

7.1 Churnet Valley and Moorland and City Railways

Overview
There are a number of phases of planned or proposed railway development in the District by Moorland and City Railway. The first stage is the opening the Churnet Valley line to Stoke-on-Trent. Subsequent stages could include potential extensions to Alton Towers, Leek and Waterhouses.

Potential impacts
There are a number of potential impacts that could arise from these railway developments:

- The opening the District to the national rail network at Stoke on Trent.
- Increasing the attraction of the Churnet Valley Railway (visitor numbers could increase from current levels of approximately 70,000 visitors towards 200k+ visitors in time).
- The potential to catalyse other sites in the district (particularly Leek Cornhill and Froghall).
- Creating both a physical and thematic linkage (in terms of some market interest – especially among the Family Fun segments) between Alton Towers and the rest of the District (notably Leek). In this respect, it offers the potential to attract some visitors out from Alton Towers - albeit these would be likely the ones staying three or more nights, which while they are a relatively small proportion of Alton Towers total visitors would be numerically significant.

As such, the development of the Churnet Valley is a key project for Staffordshire Moorlands' visitor economy in the sense of both potential direct impacts (in stimulating the Churnet Valley Railway) but also acting as a catalyst for other initiatives.

Potential markets
Enhancements to the Churnet Valley Railway will have appeal to existing Countrysiders, Discoverers and, Family Fun segments. It may also help to open up new markets that have not previously visited the area before, and these are likely to have similar visitor characteristics.

Other issues to consider
The further development of the railway will be dependent on taking other initiatives in the District – particularly the development of the Cornhill site in Leek.

7.2 Moneystone Quarry

Overview
The plans by Laver Developments are to develop a 'resort' offer including a significant range of self catering accommodation, a hotel with sauna, a reception building and

training suite along with woodland and water based activities. A traffic generation study is being carried out by the developers.

Potential impacts

The Moneystone development is a potentially significant development. Potential impacts could include:

- Significant direct impacts - jobs and spend.
- The development of a potential new market. This could be quite large and may share characteristics with Alton Towers (Family Fun) but also 'Countrysiders' in terms of some activities – with potential interests in family attractions but also with outdoor activities. The development could also stimulate further meetings and conference visitors.
- Linked to this, Moneystone has the potential to create wider impacts, with visitors staying at the site undertaking activities and spending in the surrounding area. In this sense they would add to the viability and profitability of operations in the area.
- The marketing of this site by the operators would help to further raise the profile of the area as a tourist destination.

Potential markets

While Moneystone is a potentially exciting development for the District, it will need to largely create its own market (see above). It is unlikely to survive from existing markets to the Staffordshire Moorlands. That said, it may attract or displace some existing Alton Towers visitors (see below).

Other issues to consider

This development will be largely independent of other developments in the District. It should not impact negatively on existing accommodation stock in the area. It is not dependent on other developments in the area, although might benefit from a link with the Churnet Valley Railway. That said, there is a likely to be a relationship with Alton Towers and any assumptions for visitor levels at Moneystone Quarry need to take account of a potential increase in visitor accommodation at Alton Towers.

Other issues that need to address would be the detailed design and quality of the development, and transport impacts.

7.3 Bolton Copperworks

Overview

The Thomas Bolton Copperworks lies in the heart of the Churnet Valley in Froghall. The company were established at this site in about 1880 and were associated with the production of the world's first submarine telegraph cables.

This is a strategically important site in the centre of the Churnet Valley and is a focal point for the Churnet Valley railway, the Caldon canal and is accessed by the A52 Stoke on Trent to Ashbourne road. The existing attractions of the Froghall canal basin and Froghall station are compromised by being split each side of the Copperworks site.

The development of the Bolton Copperworks site should ideally seek, in the first instance, to link together the Froghall railway station and the wharf with a corridor of public access land. This, allied to better landscaping and car parking, should help to create a better visitor experience and make Froghall a key gateway and orientation point for the Churnet Valley.

Re-development of the Copperworks could be considered for a new Churnet Valley heritage centre that could tell the story of the whole area and its industrial history and natural environment interest, together with some associated retail and catering provision. This would need to be in a prominent position close to the A52 – enhancing the tourism corridor between station and wharf. This road would require traffic calming measures or an alternative pedestrian corridor.

A significantly sized new heritage centre would possibly require to have a floor area of around 1,000 – 2,000 sq metres to be viable and to be a sufficient size to be a major visitor attraction (two examples of visitor/heritage centre buildings of this scale are the Shropshire Hills Discovery Centre at Craven Arms and the Conkers Centre in the National Forest). A detailed feasibility study of this aspect of the Copperworks site development is required.

The development of more tourism accommodation, either a hotel or self catering accommodation is being considered in a feasibility study being carried out by consultants at the time of writing (see below).

Potential impacts

- Re-development of the Copperworks site offers an opportunity to provide a gateway and focal point within the Churnet Valley and create a linkage between the canal and the railway.
- An enhanced visitor facility offers the opportunity of creating more product depth and appeal for the area.

Potential markets

This site, as a focal point for the Churnet Valley, will appeal to a number of existing markets – particularly Countrysiders, Actives, Discoverers and, to some extent (particularly through the Churnet Valley Railway), Family Fun segments.

Other issues to consider

Present levels of visitor activity could only support modest facilities, but the Churnet Valley Railway (catalysed by developments to the railway infrastructure, and other potential initiatives including the nearby Moneystone resort), could possibly support a more ambitious set of facilities.

A key issue in the development of a heritage centre will be its ongoing operation – both in terms of who might operate it but also its business model (it would be unlikely to be self-supporting). Proposals by the Churnet Valley Railway for an engineering facility and heritage centre are attractive but locationally, from a visitor perspective, are not ideal, lying some distance from the Canal basin and Station. On-going operation needs to be considered as part of a detailed heritage centre feasibility study which could build upon the site development plan being prepared by consultants at the time of writing. It may also be worth considering such a development as a legacy project stemming from the Churnet Valley Living Landscape Partnership, a Heritage Lottery Fund Landscape Partnership Scheme, where the key partners concerned with the natural and industrial heritage of the area will be working together for the next few years.

Development of accommodation within Bolton Copperworks needs careful consideration. There may be scope for some small scale development, but given existing market conditions, locational considerations, and other potential developments in the area (Moneystone, Consall Gardens, and Alton Towers), a larger scale development such as a hotel or multiple self catering units may be more questionable.

7.4 Cornhill, Leek

Overview of the potential development

The Cornhill site is situated on the south side of Leek. A key current land use is the Leek Cattle Market. The site presently has poor access through a residential area, but there is the potential to access the site with a new road from the Cheddleton Road linking across to the A53, Newcastle Road.

There are ideas for a mixed use development on the site including a railway station, a new canal basin, a hotel, leisure shopping and possibly office and residential developments.

Potential impacts

The development of Cornhill could have a number of impacts on the visitor economy:

- Developing Cornhill is a necessary pre-cursor to bringing the railway to Leek (but is also dependent on it) and connecting it to the main rail network.
- It would start to put Leek on the visitor map, opening it to the benefits of potentially increased Churnet Valley Railway visitors and, in time, a physical link to Moneystone Quarry and Alton Towers (albeit this is only likely to be of relevance to visitor staying at Alton Towers).
- The Churnet Valley Railway may promote this as a good starting point for a trip to the Churnet Valley (increasing the benefits for Leek of the Railway).
- It would create a potential tourism zone in its own right benefiting from some direct spend and employment opportunities, but the impact on central Leek may be more limited (see below).

Potential markets

The development is likely to be used by a range of markets including Countrysiders, and Discoverers (Canal Basin and Churnet Valley Railway), Treat (retail), and Family Fun (Churnet Valley Railway).

Other issues to consider
Cornhill is a key development to potentially opening up Leek and catalysing its visitor appeal – something of key importance for the District. A fuller feasibility study for this site is required and should consider the viability of the following, all of which would be a boost to tourism for Leek and the Churnet Valley:

- The restoration of the line to Cheddleton and Stoke on Trent and a new station for Leek for both leisure and business uses
- The viability of a hotel at this location
- The location of appropriate retail and catering facilities serving both the station and a new hotel.

The site would have to be developed in an integrated way for it to be a success with a number of elements being provided which would be mutually supportive. Development of the Cornhill site should be driven by two main considerations:

1. Ensuring that the site is designed for visitors. This includes ensuring good pedestrian access and sightlines between those elements (station, canal wharf, retail etc) that have appeal to visitors.
2. Maximising connectivity with the town centre. There is some doubt about how many visitors to this site on the southern edge of Leek would visit the Leek town centre and new transport links, both public and private would be required.

8. Support projects

The Staffordshire Moorlands has the potential to attract more trips from its existing markets. To do so it would benefit from a range of supporting projects that would enhance the offer by adding further product depth and /or quality.

The viability of these proposals would require more detailed assessment. Some of them can be advanced by the public sector but a number require investment by the private sector which will make its own viability assessments. The projects collectively would improve access to and within the area, enhance or develop new visitor attractions and improve the accommodation stock.

8.1 Making more of Leek

Leek has a key role to play in the visitor economy of the Staffordshire Moorlands, as its primary town and consequently a potential attraction and spending opportunity for visitors. It is currently underperforming as a visitor destination but has real long term potential. Leek is the priority as the main town and the one with greatest tourism potential for a variety of reasons. Cheadle should be seen as a secondary priority.

The following potential projects in Leek may help in the development of tourism:

- Making every effort to support and improve the retail and catering offer of the town and ensure they are more orientated to visitors – these are key areas for the visitor.
- Encouraging the development of a hotel in Leek – from a perspective of helping to develop Leek this should ideally be located in the town centre to help stimulate spend in the wider area (although it is recognised that the Cornhill site may be an easier development option). A budget hotel is likely to be the most realistic proposition.
- Development of the Cornhill site (see Section 7.4).
- Improving the appearance of the main Leek-Ashbourne road through the town and general public realm improvements
- The addition of a new theatre / art gallery
- More events
- Making more of the Nicholson Gallery with better signing and prominent entrance sign
- Stressing the Arts and Crafts connections of Leek in its promotion and events.

Tourism development is unlikely to be a rapid process and realistically it will take 5 to 10 years to start to realise Leek's potential. Such a process will require the development of Leek Chamber of Trade to be more visitor focussed and maybe advocate a Leek Tourism Champion from a leader elected member..

8.2 Enhancing access to the area and connectivity within it

Connectivity is a major issue to and around the District. While geographically, the District is well-positioned in a populous catchment area, road and rail transport could be improved. In the longer term, sustainable transport may become a more pressing issue and will need to be considered.

Addressing the following would help improve connectivity issues:

- A rail link with Stoke-on-Trent to the Churnet Valley line (see section 7.1)
- Extension of the railway and canal to a new basin close to the Cornhill site (see section 7.4)
- Improved connectivity between the various attractions within and immediately around the Churnet Valley through more sustainable forms of transport. This would involve the development of gateway areas such as Froghall (see section 7.3) and Cornhill site (see section 7.4) designed to cope with car borne traffic. These could be supported by improved footpaths and cycleways (and possibly some new ones), and improved signing and information provision.
- Continuing to investigate the potential to extend the canal to Uttoxetter, working with the canal Trust and probably initially implementing it as a footpath link

The AECOM report on transport and connectivity looks at these matters in more detail.

8.3 Developing and improving attractions / attractors

The Staffordshire Moorlands has a number of attractors which can be further developed and improved. This would enhance the depth of offer for both day and staying markets.

The key attractors where there is further development potential are:

- Alton Towers
  Alton Towers is planning a programme of on-going investment over the next 10 years. This is the subject of a separate SPD. This investment will maintain and improve the attractiveness of the resort, and increase dwell time. An element of the plan is to provide further accommodation stock – either a hotel or lodge style. While the benefits of Alton Towers is largely site specific, this investment will be a good thing for the District in terms of maintaining Alton Towers' market position and increasing spend (and jobs) on site. Further development of accommodation at Alton Towers is unlikely to have a negative impact on other local accommodation operators. Alton Towers will create its own markets. There may also be the possibility that, by creating a longer stay market (3 nights plus), there are opportunities to create some linkages between Alton Towers and the rest of the District – most particularly via the Churnet Valley Railway (see section 7.1).
- Consall Hall Gardens
  The owner is considering the establishment of a Trust to manage and better interpret the gardens and there are plans to locate accommodation in the form of

high quality self catering lodges in part of the garden and possibly a caravan and camp site nearby. Improvements to the visitor facilities, with the provision of a new café and introductory interpretation of the history of the estate and William Podmore would do much to enhance the site as a visitor attraction. Currently a road links the garden and house with Consall Forge station and the Black Lion Inn and these linkages should be maximised through signposting, mutual promotional activity, and possibly joint ticketing between the two attractions.

- The Peak District
  The Peak District has a national profile and is attractive for a range of outdoor activities. Possibilities for development are likely to be limited to small scale developments in villages and the promotion of outdoor activities. Nevertheless the development of a range of varied outdoor activities will help improve the overall attractiveness of the District – adding depth to the offer. For the Staffordshire Moorlands, the Roaches is a magnet site but there are capacity and management issues here (which the National Park Authority is aware of).
- Inland waters
  The two main inland waters of Rudyard Lake and Tittesworth Reservoirs are set in attractive landscape and there is potential for moderate growth around watersports, fishing, camping and wildlife observation.
- Interpretation
  There is potential for increased interpretation of the industrial heritage and natural environment (section 9.5) with possibly a significant heritage centre/museum as part of the Bolton Copper Works site or in association with the Churnet Valley Railway (section 7.3).
- Quality and adding value
  In the current economic climate consumers will increasingly expect value for money and value to be added to the services and products they buy and this is relevant at whatever price bracket. Attraction operators should aim for visitors to go away feeling that their experience has exceeded their expectations. There are a number of awards which will distinguish attraction operators for the quality of what is on offer and this should be encouraged by strategic organisations such a destination management organisations. Affiliation with a quality assurance scheme (e.g. that offered by VisitEngland) will raise the credibility of the individual provider and the destination in general. More information can be found on the Tourism Trade Website http://www.visitengland.org/busdev/accreditation/attractions/VAQAS.aspx.

NB. The Churnet Valley can be regarded an attraction in its own right, and this is covered in detail in Chapter Nine

8.4 Events development

Events can provide locally distinctive experiences for the visitor and help attract and disperse visitors from and to certain areas.

We feel that the promotion of markets and events would be beneficial to Cheadle and Biddulph in particular. For the former, events and market will provide visitors to the church at St Giles a reason to linger in the town. In the case of Biddulph, beyond the National Trust's Grange Gardens, there is little realistic scope for further development of tourism. The gardens are not within the town centre and there is little to draw visitors into the town. Events could potentially help draw visitors into the town centre and there is the existing Folk Festival at Biddulph. A programme of additional events should be developed in tandem with continued town centre improvements.

In addition, well publicised events and markets in Leek would be beneficial. The Churnet Valley's industrial heritage could be the basis for a new heritage festival which could be a legacy project stemming from for the Living Landscape Partnership Scheme (see section 9.5).

8.5 Enhanced accommodation stock

There are a number of plans in place for new accommodation at the various sites across the District, including Bolton Copperworks, Moneystone Quarry, Consall Hall Gardens, Alton Towers and Cornhill in Leek (see above).

Existing markets are unlikely to support major expansions of accommodation stock. While, there will always be scope for well run quality businesses in the right locations, further accommodation development is likely to result in some displacement from existing businesses. However, the development of further accommodation is desirable in certain instances and locations. For example:

- Further small serviced and self catering accommodation of varying qualities/price located particularly in the Churnet Valley
- Budget hotel accommodation in Leek and possibly in Cheadle
- More moorings on the Caldon canal.

However, the issues around accommodation are not so much about quantity, but rather about the type, standard and quality of the offer. There are some general principles which should be observed in the development of accommodation:

- Specialisation can be a way of broadening the appeal to a wider audience by focusing on the particular requirements of different markets. VisitBritain outlines opportunities for becoming specialised through a number of schemes, for example:
    - National Accessible Scheme (NAS)
    - Welcome Pets
    - Welcome Families

- Welcome Cyclists
- Welcome Walkers

- There are a number of opportunities for new product development for camping and caravan sites in particular which relate to the trend of ‘glamping’ and the popularity of alternative camping accommodation such as yurts, pods and tipis. These are often successfully combined with more traditional types of accommodation such as tented camping, caravanning, self-catering units or B&B. This broadens the appeal to a range of tastes, generations and budgets and enhanced facilities such as this can help extend the season into autumn and winter.
- Product differentiated by locality will have significant appeal – for example, places to eat should use primarily locally sourced food and drink. If a shop is part of the offer then this should stock locally sourced food, produce, craft etc., and new builds for accommodation should consider the local architectural vernacular.
- For the older, aging generation (i.e. 75+), accommodation providers may need to tailor their facilities to ensure that they are accessible (i.e. accommodation on one level or ground floor, showers instead of baths etc.).
- Flexible accommodation will be required which allows for different groups to stay together. This may include single parents, families of different generations (e.g. grandparents spending time with their grandchildren) and groups of friends.
- Flexible costing which can accommodate different family groups without supplements will be more important.
- Self-catering accommodation in particular can allow for flexibility in terms of groups sizes and requirements and is a growth area.
- Consumers will increasingly expect value for money and value to be added to the services and products they buy. This is relevant at whatever price bracket, and accommodation providers should aim at visitors going away feeling that their experience has exceeded their expectations. There are a number of awards which will distinguish accommodation providers on the quality of what is on offer and this should be encouraged by strategic organisations such a destination management organisations. Affiliation with a quality assurance scheme (e.g. that offered by VisitBritain) will raise the credibility of the individual provider and the destination in general. More information can be found on the Tourism Trade Website http://www.qualityintourism.com/asp/letsgetassessed.asp.

8.6 Going green

Going green is particularly relevant for the rural landscapes of the Peak District and its fringes. Resource efficiency makes economic sense both in terms of cost savings (particularly with regards to water and energy use), while being seen to be green sets businesses apart from the rest of the pack and is part of the consumer decision making process. Mitigation and adaptation to climate change will become increasingly important in coming years. In our opinion, the District has scope to accommodate further visitors and there are a number of actions which should be encouraged to ensure that any growth or development in the district remains sustainable and represents good environmental practice.

- Initiatives for sustainable businesses
  There are a number of initiatives for helping the industry adopt sustainable practices - for example, Green Start which has been recently launched by VisitEngland. Green Start provides advice on green initiatives and is primarily an awareness-raising, entry level training, and business review tool available to tourism businesses seeking to reduce their impacts on the environment or community in which they are located. (See http://www.better-tourism.org/).
- Green certification
  Information is key for the consumer in making decisions about green options. Green certification offers an easy way for consumers to differentiate businesses that are actively going green. The Green Tourism Business Scheme is the national sustainable tourism certification scheme for the UK (see http://www.green-business.co.uk/index.asp), the Peak District Environmental Quality Mark (http://www.peakdistrict.gov.uk/eqm) should also be encouraged.
- Ecology and conservation
  Specifically aimed at caravan and holiday parks, the David Bellamy Awards allow consumers to identify parks which have met certain environmental standards, including managing their land as a haven for wildlife.
- Visitor payback schemes
  These scheme can be used as a way of funding conservation projects and raising awareness in visitors of conservation issues. Visitor payback schemes can operate at a whole range of scales, from very small single hotels raising money for a project nearby through to much larger schemes with a range of collection techniques, such as that operating in the Lake District. Experience has shown that it can take a significant amount of administrative effort to establish a viable scheme and even once established there is substantial administrative expense in collecting lots of small sums of money from many establishments. The key is to get one or two anchor partners who can contribute a large proportion of the funds or support administrative costs. There is experience now (both good and bad) with raising visitor payback funds through the following techniques:
  - A small proportion of ticket sales of a ferry operator and at visitor attractions
  - "Opt in" and "opt out" (preferably) contributions collected by accommodation providers, attractions, shops and restaurants
  - A proportion of car park fees or additional voluntary car park contributions
  - The sale of badges etc. at pubs and shops
  - Voluntary donations
  - Special fundraising events
  - Sponsorship schemes for particular events or projects
  - Sale of publications
  - Voluntary donation machines in car parks

The cost of establishing these collection methods should not be underestimated and for a scheme to be successful it will require an initial investment by a number of launch partners.

- Contingency planning and building adaptation
  As a result of climate change there are three likely events to which businesses should adapt and plan for – flooding, drought and heat waves. An online toolkit to help prepare tourism businesses for these events is available at: (http://www.climateprepared.com/index.php).
- Provision of alternative transport arrangements – especially in rural areas
  Accommodation providers may need to facilitate a switch to car-free tourism. In the first instance, by making people aware of the alternatives and then supporting this by providing practical support such as lifts to and from public transport points and bicycle hire and provision. Alternatives to car transport should be encouraged, and they may be achieved through the enhanced connectivity discussed in Section 8.2. See also the AECOM transport recommendations.
- The VICE model
  This provides a useful checklist for any proposed project to assess its sustainability credentials.
- Carrying Capacity and Impact Assessment
  The environmentally specific elements of the VICE model can be addressed in detail by applying the concept of Carrying Capacity. In tourism terms, carrying capacity is defined as the amount of visitor-related use an area can support while offering a sustained quality of recreation, based on ecological, social, physical and managerial attributes and conditions. The focus is on determining the level of use beyond which impacts exceed acceptable levels specified by evaluative standards[22]. Carrying capacity can be used to define criteria for impact assessment, decision making and adaptive management that can then be applied to specific tourism proposals, activities and development.
  The key to establishing any sound carrying capacity approach is the identification of numerical thresholds and the establishment of cost effective monitoring and measurements of factors over a long period and the establishment of a decision making group that represents all major stakeholders. For these reasons there are few examples of its successful application in the UK.
- Landscape
  The effects on the landscape will primarily be caused be visual intrusion of parked cars and traffic (see AECOM traffic study) and inappropriate design or location of developments and these should be avoided through the sound application of development control policies.

8.7 Retail

Leisure shopping is an important component of the visitor economy. According the to theStaffordshire Moorlands Tourism Economic Impact Assessment 2009 , shopping accounted for 26% of overall visitor spend in the district . Enhancing the retail offer in the towns of Leek, Cheadle and Biddulph will continue to be a part of general planning

[22] CBD and UNEP Managing Tourism and Biodiversity http://www.cbd.int/doc/programmes/tourism/tourism-manual-en.pdf

and development policies for those towns (see section 8.4 on the role of markets and events). The town Master plan for Cheadle found that:

- The high percentage of independent traders means the Town Centre has a notably below average share of national multiples. It is not at risk of being characterised as part of 'Clone Town Britain'
- The Town Centre has a strong convenience goods offer. It performs less well in terms of comparison shopping and is experiencing above national average vacancy rates
- The town acts as an important provider of local services, especially for financial services
- The absence of modern larger retail units (1500-2500 sqft floorplates) is a barrier to the introduction of more national retailers.

Among the strategic objectives of the town are:

- To revitalise and sustain the town's market
- To develop the town centre's offer for residents and visitors (daytime and evening economy)
- To reduce the high level of vacant premises

For Leek the town masterplan finds that:

- Leek is the primary retail centre for Staffordshire Moorlands District. Though assessed as a 'local centre' in the UK Town Centres ranking, Leek continues a role as a market town, administrative centre and employment generator for the District.
- The town has a high percentage of independent traders (around 80 percent) and a notably below average share of national multiples. It is not therefore at risk of being characterised as part of 'Clone Town Britain'.
- Although there is a marginally above national average vacancy rate for the Town Centre study area retail outlets (over 14 percent compared to 13 percent), this is not the case for what is considered to be the true Town Centre area. There the vacancy rate is only 6.5 percent – half the national average.

Smaller scale retail that relates to the theme of attractions and supports their viability will have a part to play and this will be a particularly important consideration when planning the redevelopment of the Bolton Copperworks site, with the improvements proposed for Consall Hall Gardens, with the Churnet Valley Railway and with the planning of the Cornhill site in Leek. There has also been some suggestion that small scale retail could be part of the development at Moneystone Quarry.

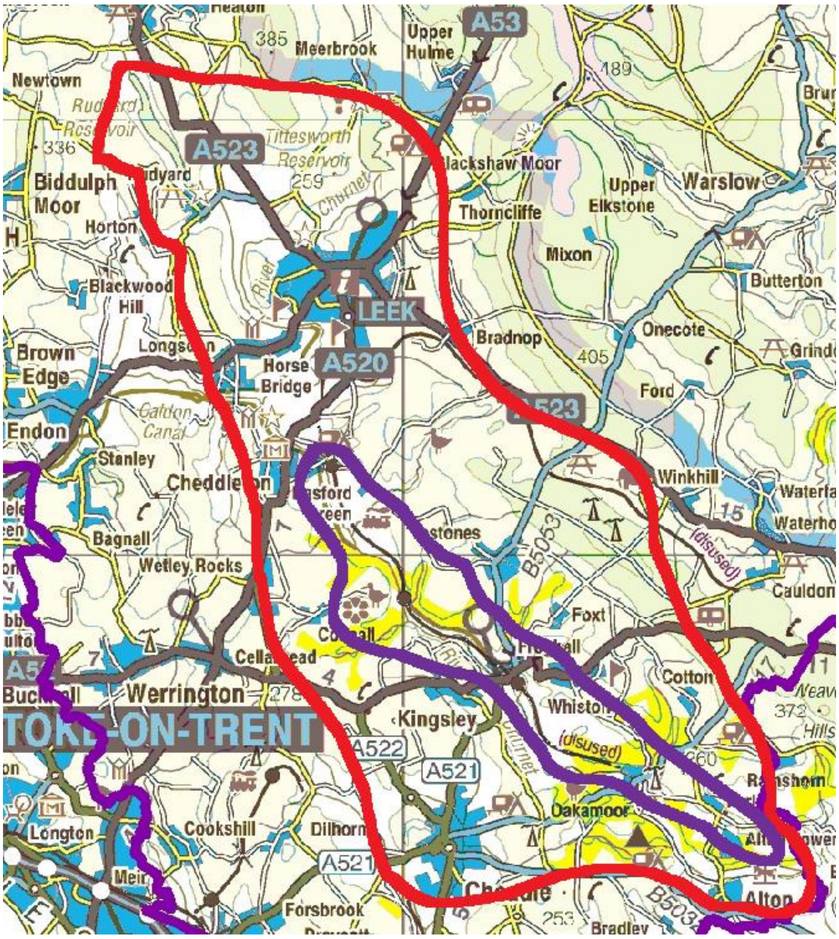
9. The Churnet Valley Assessment

9.1 Introduction

This section covers a more detailed analysis of the Churnet Valley, building on the previous sections of the report. We have defined the Churnet Valley in two ways – an inner core area and an outer area.

The inner core area (purple line on map below) is the valley itself defined by its steep sided wooded slopes, the river Churnet and the railway and canal corridors. It stretches from Cheddleton Heath and Horse Bridge in the north to Alton Towers and Alton village in the south. This is the area which has the landscape and heritage character that defines the Churnet Valley. This area represents the core proposition and product offer of the Churnet Valley.

The outer zone (red line on map below) can be defined as the area stretching from the Rudyard Lake and Tittesworth Reservoirs in the north, including the towns of Leek and Cheadle and the village of Ipstones. This is the broader zone where visitor facilities, attractions and accommodation could also be developed and linked to support and enhance the inner Churnet Valley product.



Churnet Valley - Inner core area and outer zone

9.2 The current situation

The Churnet Valley inner core zone has the following strengths and weaknesses.

Strengths:

- Intimate attractive landscape
- Industrial heritage based on railways and the Caldon Canal
- Wooded, so can potentially absorb developments from an aesthetic point of view
- Natural environment sites of interest.

Weaknesses:

- Parts are inaccessible by car with poor roads
- Poor linkages between sites
- Relatively unknown
- Limited accommodation
- Environmental vulnerability of some sites.

9.3 Markets and positioning

In terms of marketing and positioning the Churnet Valley should be orientated primarily but not exclusively to the 'Countrysiders' segment and positioned under the umbrella Peak District brand, where there is the greatest market synergy. In time, and with an opening of a rail link to Alton, there will be an argument for the Churnet Valley Railway to position itself closer to Alton Towers – around providing an alternative experience for the Family Fun market (particularly those with younger – under 9 – children).

There is merit and appeal developing a series of heritage type attractions along the valley. However, the heritage offer is more flavour than a unique selling point, compared to a site such as Iron Bridge Gorge where the key attractor is the heritage. The Churnet Valley has a mix of different attractors of which heritage is just one.

To recap from Section 5.2, the characteristics of these two main markets are as follows.

Countrysiders:

- Primarily coming for a combination of experiences – activities, discovery / sightseeing, and rest and relaxation. Outdoor activities will be the predominate activity but the natural environment and scenery will be a key underpinning appeal.
- They will however undertake a range of activities while staying in the area and will have a propensity to travel around and explore.

- They will be staying for an additional holiday / short break – typically in independent accommodation (B&B, self catering) – typical length of stay will be 2 to 3 nights or 6 to 7 nights.
- Demographically they will be primarily middle-aged ABC1 couples – travelling from a wide area.

Family Fun:

- Fun day out with the family – typically visiting an attraction. Alton Towers is the primary attraction (accounting for the vast majority of visits) although this market group may visit some other attractions in the District (albeit in considerably lower volumes).
- The Alton Towers group will be pre-dominantly C1 with children of ages from pre-school to secondary school and travelling from a wide catchment. This group will generally stay at Alton Towers with limited activity elsewhere in the District.
- The 'family fun' market found elsewhere in the District is more likely to be local (most typically from Staffordshire) with a higher proportion of younger (pre-secondary school) children. They may undertake some secondary activities in the district – eating out, walking etc.

9.4 Developing the Tourism Economy

The Churnet Valley has significant visitor potential linked to the combination of its fascinating industrial heritage, attractive natural environment, the walking and cycling possibilities, the canal and the further development of the Churnet Valley Railway as both an attraction but also a transport link. This combination represents the core market proposition for the Churnet Valley.

The potential of Churnet Valley lies in its development as an attraction – conceived as providing a full day's activity, with a mixture of experiences.

The following are potential developments for the visitor economy of the inner core area of Churnet Valley – aimed at attracting more visitors, and getting them to spend more time in the valley. The inner zone is the focal point and core offer and until this is fully developed the relationship with the outer zone is similar to anywhere else in the region in that the outer zone provides visitor with additional facilities, attractions and accommodation which support and enhance the inner Churnet Valley product.

Moneystone Quarry
The plans by Laver Developments are to develop a 'resort' offer including a significant range of self catering accommodation, a hotel with sauna, a reception building and training suite along with woodland and water based activities. A traffic generation study is being carried out by the developers (See section 7.2)

Bolton Copperworks
The redevelopment of this site offers an opportunity to enhance the offer of Froghall, making a key gateway and orientation point for the area (see section 7.3). Re-

development of the Copperworks could be considered for a new Churnet Valley heritage centre that could tell the story of the whole area and its industrial history and natural environment interest, together with some associated retail and catering provision.

Consall Hall Gardens
The owner is considering the establishment of a Trust to manage and better interpret the gardens and there are plans to locate accommodation in the form of high quality self catering lodges in part of the garden and possibly a caravan and camp site nearby (See Section 8.3).

The Churnet Valley Railway
The raft of proposals for the development of the Churnet Valley Railway could have a step changing impact on the area – creating significantly greater visitor activity, which would have potential spin off benefits for other operations (see section 7.1). Railway related proposals may also encourage visits to the area by rail (rather than car) - the AECOM transport report looks at this issue in more detail.

The Caldon Canal
The Caldon Canal is one of the most beautiful canals in England and has the potential to attract more boaters. To encourage this, more moorings should be provided to encourage boaters to stay longer and the boat access to Froghall wharf needs to be improved through modifications of the canal tunnel and bridge.

Canal towpath improvements should also be encouraged and supported.

Walking and cycling routes
A core element of the Churnet Valley proposition is the provision of quality walking and cycling routes. These need to be well maintained and signposted to make use visitors easier. There also needs to be a variety of visitor orientated routes – e.g. a series of small circular routes from the Froghall gateway (there are some currently from the Wharf area) but also larger circular routes encompassing the whole Valley. While there is the obvious route up and down the valley, alternative routes on the north and south side of the valley would be beneficial – particularly to link attractions (like Consall Hall Gardens) and settlements (like Oakamoor, Whiston, Ipstones, Cheddleton and possibly Cheadle).

The AECOM transport report makes specific proposals on walking and cycling routes and also public transport.

Accommodation
There are proposals for new accommodation development at Moneystone Quarry (see section 7.2), Consall Hall Gardens (section 8.3) and Alton Towers. These will create significant accommodation stock for the area, and, in the case of Moneystone Quarry, new markets.

Aside from these the scope for further accommodation in the Churnet Valley (especially in the short to medium term) will be limited to relatively small scale developments – the emphasis needs to be on quality and a strong market focus.

Quality food and drink

A research project to develop locally branded food by Staffordshire Wildlife Trust in the Weaver Hills area showed that the area was far too small for such a project. The new Churnet Valley Living Landscape Partnership scheme is investigating the potential for this in the wider Churnet Valley area. Although we suspect that again this area is too small for such a branding scheme to work on a large scale, it would be beneficial to encourage local accommodation providers and food and drink retailers to purchase local foodstuffs as part of the general green tourism trends. Investigations should be made to see if the Churnet Valley area food producers would wish to be linked to the Peak District food produce branding exercise that is presently being developed (see: peakdistrictfoods.co.uk). Peak District LEADER programme has funded a three-year 'Extending the Season' project which is being delivered by University of Derby aligned to the Peak District Foods.

9.5 Enhancing interpretation in the wider Churnet Valley area

Investing in environmental and heritage interpretation will help both to enhance the tourism product of the area whilst helping to reinforce its 'sense of place'. Interpretation is defined as "the art of explaining the meaning and significance of places visited by the public" and should include on site interpretation such as boards, artworks, trails, events and interpretive centres as well as off site interpretation such as explanation of the area in museums and on the internet. There is also increasing interest in providing information through hand held devices.

Where interpretation is likely to be provided by a range of different organisations there is the need for an area interpretation plan and this is required for the greater Churnet Valley area in particular. This plan should cover the following:

- Agree the specific objectives for interpretation provision
- Identify the main sites where there is a key story to tell
- Survey what interpretation already exists and its appropriateness today
- Identify any constraints that would restrict the future provision of interpretation facilities and services
- Agree the main topics and themes for the interpretation
- Suggest what techniques and media are best to use in different locations
- Agree which organisations will do what
- Indicate a broad capital and revenue budget for each project
- Suggest priority projects
- Agree how the interpretation products and services will be promoted
- Suggest how the interpretation services will be maintained and evaluated over time

The area has a number of key stories to tell which have the potential to enhance its image and attractiveness to visitors. These include the following, but the interpretation plan may identify further topics of importance:

- The industrial archaeology history of the Churnet Valley
- The history of the railways and canals
- Leek and the arts and craft movement links
- The reservoirs and water supply stories associated with Rudyard and Tittesworth Reservoirs
- Woodlands and their ecology
- The grasslands and their ecological interest
- The River Churnet, its natural history and heritage
- Mining and quarrying history
- The Bolton Copperworks site
- Pugin and his legacy of buildings
- The history of Alton Towers.

In the case of the outer Churnet Valley area (including the reservoirs of Rudyard and Tittesworth, Leek, and the Churnet valley as far as Alton) it will be required to bring the main heritage site owners and voluntary organisations together to act as steering group for the production of an interpretation plan and to approve its proposals. This may be best achieved through the Churnet Valley Living Landscape Partnership scheme.

9.6 Promotion

The Churnet Valley would benefit from further promotion. Elements of this should initially include:

- Associating the Churnet Valley with the Peak District as far as possible. This should not preclude working under a Staffordshire banner however since this would bring benefits particularly in day visitor markets. The emphasis in messaging needs to be subtly different.
    - Under a Peak District umbrella the primary audience would be Countrysiders (but also Actives and Discoverers) and the promotional emphasis would be on activities and industrial heritage
    - Under a Staffordshire banner, the primary audience would be Family Fun with more emphasis on the railway.
- Stronger connectivity between promotional activity by the Churnet Valley Railway and the wider valley product (and vice versa). In time the Churnet Valley would benefit from a specific website and brochure. In the short term, specific content should be developed for the Staffordshire and Peak District destination websites.

- Concentrating on the inner area of the Churnet Valley as a day out – targeting both day visitor from home and staying visitors. Inclusion of the outer area would dilute messages and potentially confuse an audience.

In the short term, promotion of the Churnet Valley should be relatively low key. There is significant product development to be undertaken (see section 9.4) - particularly the redevelopment of the Bolton Copperworks site, which is a key gateway and nodal point in the valley capable of absorbing more significant visitor numbers.

9.7 Delivery of Tourism Development in Churnet Valley

The tourism potential and the attractive character of the Churnet Valley suggest that the best way forward is to take a coordinated planning and sustainable development approach that combines the encouragement of tourism and the visitor economy with the management of the environment and visitors. The preparation of the Churnet Valley Master Plan gives the opportunity to make recommendations for ongoing planning and management structures.

The models being developed in a number of English AONBs would be an ideal way to view matters. The Forest of Bowland AONB in Lancashire is one such model and the various plans and policies developed recently there indicate the type of approach that would be suitable in the Churnet Valley corridor. (see: www.forestofbowland.com)

Some coordination will be required that brings together the public, private and voluntary sectors. The partnership approach being developed through the Churnet Valley Living Landscape Partnership, an HLF Landscape Partnership Scheme, should be built upon and at the end of that scheme there could be a series of legacy projects that would continue to encourage the sustainable development of recreation and tourism in the area.

The types of initiative we have in mind may include:

- A detailed interpretation and heritage management group/organisation that continues to develop and manage the interpretation of the heritage of the area
- A tourism marketing group who would link to Peak District and Derbyshire Marketing
- A sustainable transport group who would encourage the further development of public transport and information about transport options to and within the area
- A green tourism initiative
- A visitor payback scheme
- A conservation volunteers group (linked to the Wildlife Trust possibly)
- A local food group that would link to the Peak District Foods initiative
- The ongoing work of the Caldon and Uttoxeter Canal Society

Funding for these initiatives would need to be sought from the HLF, Natural England, English Heritage, European Funds and charitable foundations and from those budgets which may follow on from the role of the Regional Development Agency.

Coordination of such an initiative will be required and the appointment of a Churnet Valley Project Officer should be considered, although this will have obvious resourcing implications and could be difficult for the local authority to support at this time. Support for such a post could be sought from Alton Towers and from Laver Developments at Moneystone quarry.

10. Conclusions

This report has reviewed the trends in UK tourism, analysed the existing data on visitors to the Staffordshire Moorlands, suggested a simple visitor market segmentation and made some suggestions concerning the development of the tourism economy for the District and the Churnet Valley corridor. The following table summarises key possible future projects and developments. We have tried here to give the projects some sense of prioritisation by demonstrating the outcomes for individual projects, the linkages to other projects and the potential impact on the tourism economy. It is difficult to predict the outcome, if these are not achieved, as there are many varying combinations of potential delivery. Furthermore, it should be noted that the information in this table is indicative only and we cannot be more definitive regarding timescales and prioritisation without further development of a tourism strategy.

10.1 Summary of potential developments

Transformational projects

Project	Potential impact on tourism economy* (4 star = most impact)	Potential outcomes	Dependencies and linkages	Role of public sector	Other potential key players	Potential sources of funding	Timeline
Churnet Valley Railway: extension Linking the heritage railway to Stoke, Leek and Alton	****	Greatly enhanced access. Increased numbers on heritage railway. Public transport access to Alton Towers. Spur to tourism development of Leek.	Will affect development at: Leek Bolton Copperworks Cornhill Partly dependent on Cornhill development	Working with Churnet Valley Moorland and City Railways in facilitating role Making land available for development	Churnet Valley and Moorland and City Railways North Staffordshire Railway Co	Churnet Valley Railway, Moorland and City Railways and North Staffordshire Railway Co	Planned to commence in next 2 years, with ongoing additional developments
Moneystone Quarry:	****	Major direct impacts (spend	Discrete project with no	Manage planning consent	Laver Development	Laver Developments	Unknown (dependent on

Transformational projects

Project	Potential impact on tourism economy* (4 star = most impact)	Potential outcomes	Dependencies and linkages	Role of public sector	Other potential key players	Potential sources of funding	Timeline
Development of resort and activity area		and jobs) Provision of accommodation	significant dependencies.				Laver Developments)
Bolton Copperworks: Redevelopment of large site in key location	***	Development of Froghall as a key gateway site with appropriate visitor facilities. Potential new heritage attraction.	Partly dependent on development of Churnet Valley Railway Some dependency on Moneystone Quarry to generate market	Manage planning consent Provide better landscaping, orientation, car parking and traffic calming.	Churnet Valley Railway, Churnet Valley Living Landscape Partnership	HLF	?
Cornhill, Leek: Development of site for railway, canal basin and hotel and retail development on south side of Leek	***	Opens Leek to railway visitors (although a link to the town centre will be required). Create a tourism zone on south Leek Provide gateway site for the CVR Attract more boaters to Leek	Pre-cursor to bringing the railway to Leek (but is also dependent on it) Development of Leek is partly dependent on this project.	Facilitation and planning role. Land acquisition and making site available for development Also to ensure good pedestrian access and sightlines between station, canal wharf and retail etc. and to maximise transport links to town centre	Churnet Valley Railway, Moorland and City Railway, North Staffordshire Railway Co, Churnet Valley Living Landscape Partnership Leek Chamber of Trade, Leek Tourism Champion	Churnet Valley Railway, Moorland and City Railways and North Staffordshire Railway Co	?

* NB. Relative impact. Those rated with lower star grading will still have significant impact.

Support projects							
Project	**Potential impact on tourism economy*** **(4 star = most impact)**	**Potential outcomes**	**Dependencies and linkages**	**Role of public sector**	**Other potential key players**	**Potential sources of funding**	**Timeline**
Making more of Leek: Programme of enhancement, events and new facilities building on the arts and crafts history	***	Would provide the area with a major tourism town Possible further accommodation provision Enhanced spending opportunities	Development of Cornhill site	site marketing and managing planning process (for new hotel) Improve appearance of the main Leek-Ashbourne road and public realm Events development	Leek Chamber of Trade, Leek Tourism Champion Hotel developer	Private sector investment required for new / enhanced accommodation, retail and catering	5 to 10 years to start to realise Leek's potential
Access and connectivity: Gateway sites Enhanced walking and cycling routes Investigate potential of extending canal	**	Help to create the valley as more of a coordinated attraction Encourage people out of their cars Attract more walkers and cyclists	Bolton Copperworks Development of Cornhill site	Key role in improving connectivity of key sites by car. Footpath and cycleway improvements Improve signage and information Working with Churnet Valley Moorland and City Railways in	Churnet Valley Railway Caldon and Uttoxeter Canals Trust	Some from HLF Landscape Partnership Local authorities Further HLF bids	Develop over next 2-5 years

Support projects							
Project	**Potential impact on tourism economy* (4 star = most impact)**	**Potential outcomes**	**Dependencies and linkages**	**Role of public sector**	**Other potential key players**	**Potential sources of funding**	**Timeline**
				facilitating role			
Develop attractions: Developments to Alton Towers , Consall Hall Gardens, Bolton Copperworks/Froghall and small scale developments and quality improvements elsewhere.	***	Enhance the visitor product and further develop its critical mass	Decisions of private sector	Manage planning process	?	Private Sector	Next 3 to 10 years
Events: Markets and events development in the towns and a new Churnet Valley Heritage Festival	**	Enhanced offer for towns Showcase the heritage of the Churnet valley	Few dependencies Will enhance product depth for the area	Direct role in events organising	Churnet Valley Living Landscape Partnership Leek Chamber Cheadle Business Group Biddulph Business Chamber	Local private and voluntary sector HLF grants	Within 5 years
Enhanced accommodation: Potential hotel development in Leek and Cheadle Qualitative and small scale developments elsewhere	**	Catalyst in Leek and Cheadle Strengthened visitor offer.	Some dependency on Cornhill. Will enhance offer for the area	Manage planning process	Alton Towers Laver Development Consall Hall Gardens Bolton Copperworks	Private sector investment	Ongoing over 5-10 year period
Going Green : Product "greening"	*	Assist with quality standards,	Few dependencies	Manage planning	Private sector (accommodation)	Private sector	Ongoing

Support projects							
Project	**Potential impact on tourism economy* (4 star = most impact)**	**Potential outcomes**	**Dependencies and linkages**	**Role of public sector**	**Other potential key players**	**Potential sources of funding**	**Timeline**
		resource efficiency and image	but will enhance offer for the area	process Traffic management Greater provision of public transport	PDEQM Transport providers		
Retail: Enhanced shopping offer in the main towns	**	Attract more visitors to Leek in particular	Few dependencies but will enhance offer for the area	?	Leek Chamber Cheadle Business Group Biddulph Business Chamber	Private sector	Ongoing

Churnet Valley projects							
Project	**Potential impact on tourism economy* (4 star = most impact)**	**Potential outcomes**	**Dependencies**	**Role of public sector**	**Other potential key players**	**Potential sources of funding**	**Timeline**
Bolton Copperworks:	See above						
Churnet Valley railway	See above						
Moneystone Quarry	See above						
Consall Hall Gardens	See above						
Caldon Canal: Improving access to Froghall wharf and providing more moorings	*	Encourage boaters to spend longer in the area	Dependent on Boat access at Froghall Wharf and Canal towpath improvements	See Bolton Copperworks	Churnet Valley Railway Caldon and Uttoxeter Canals Trust	?	Develop over next 5 years
Walking and cycling routes: Better footpaths and cycleways, signing and information	*	Attract more walkers and cyclists	Partly dependent on development of Froghall Wharf Key influence on Churnet Valley proposition of quality walking and cycling	Footpath and cycleway improvements Improve signage and information	Churnet Valley Railway Caldon and Uttoxeter Canals Trust	?	Develop over next 2-5 years
Accommodation: Small scale developments	*	Strengthened visitor offer.	Few dependencies butwill enhance offer for the area	Manage planning process		Private sector investment	Ongoing
Enhancing interpretation: Enhanced interpretation of heritage and	*	Help to enhance the walking and exploring product of the Churnet valley	Will be partly influenced by development at Froghall Wharf		Main heritage site owners and voluntary organisations Churnet Valley	HLF	?

Churnet Valley projects							
Project	**Potential impact on tourism economy* (4 star = most impact)**	**Potential outcomes**	**Dependencies**	**Role of public sector**	**Other potential key players**	**Potential sources of funding**	**Timeline**
environment.:		Reinforce 'sense of place'			Living Landscape Partnership		
Quality food and drink: Relate local food to the Peak District food branding	*	Reinforce the links with the Peak District tourism brand	Few dependencies but will enhance offer for the area	Marketing Business support	Peak District LEADER University of Derby	Peak District LEADER programme has funded a three-year 'Extending the Season' project which is being delivered by University of Derby aligned to the Peak District Foods.	Ongoing

* NB. Relative impact. Those rated with lower star grading will still have significant impact.

10.2 Final comments

This report has shown that the Staffordshire Moorlands which already has some 2,500 jobs supported by the visitor economy has the potential and capacity to attract more visitors and to create more jobs in this sector. Key to this will be the potentially transformational projects of the Churnet Valley Railway, the Moneystone Quarry, Bolton Copperworks and Cornhill, Leek. These could provide significant impact on the tourism economy of the District, either in terms of direct impact and job creation or in terms of catalysing wider development.

Transformational projects evidently have the biggest impact, but within these there are clear priority projects on which other projects have greatest dependency. These are the Churnet Valley Railway and the development of Cornhill at Leek.

In addition, there are a number of support projects that would enhance and add depth to the offer of the area. These include enhancing its attractions and accommodation stock but also the provision of more events and the greening of the offer. Key to the further development of the District is the development of Leek as a 'tourism town', although this will need to be an going process undertaken over a number of years.

The Churnet Valley has significant potential to be further developed as an attraction through the development of its heritage, nature based and active outdoor recreation products. These represent its core proposition to the market place. The Valley will have appeal to two main market segments, described as Countrysiders and Family Fun. These sit well with the existing marketing propositions of the Peak District and Staffordshire banners respectively.

The wider District will benefit from positioning itself under the umbrella of the Peak District tourism brand.

Appendix 1: Trends and futures trends background paper

This paper identifies key trends and factors of change which are affecting the tourism industry and will continue to do so over the next 5 years (albeit some factors, like climate change will have much longer impacts). The paper commences with key trends seen nationally, under the headings of economics, demographics and society, environment, and technology. The paper then identifies specific trends in sectors / products / which are most relevant to the Staffordshire Moorlands District.

Key Trends

Economics and tourism

In the short term there are several economic factors which will influence tourism:

- The uplift in domestic holidays in 2009 was generated by two groups of Staycationers
  "Switchers" include a high proportion of families - they are primarily motivated to 'switch' a foreign holiday for one at home because of financial constraints - and "Extras" who tend to be younger and are more likely to be single. They are less affected by their economic situation and are more motivated by a desire to explore the UK and go somewhere new.
- Staycation – still significant, but news a little mixed[23]
  Recent research for Visit England shows the Staycation was as strong in 2010 as in 2009. Financial pressures will suppress wholesale switching back to a holiday abroad in the shorter term. Almost half of respondents feel likely to take more England holidays than usual post 2010. A decent level are open to persuasion to take more England holidays – and there is opportunity there. In general, respondents view holidays in England positively and discovering new places in England is, slightly more positive than rediscovery. The slightly less positive news is that 2011 may lose some mid-length Switcher holidays in England, as they return abroad. Furthermore, UKTS year to date figures show a decline in volume and value of domestic tourism
- Britons are forecast to be less well off [24]
  Following the recent cuts in public sector spending including the freeze in child benefit, the removal of family tax credit from many families, the real terms cut in the higher rate threshold, and rise of VAT, James Browne at the IFS suggests that households in the middle of the income distribution will have lost about £10.60 a week - or more than £550 a year - by January 2013.
- Inbound visitors gradual recovery[25]

23 http://www.visitengland.org/Images/Staycation%202010%20Debrief%20Presented%20by%20Olive%201st%20Oct_tcm143-197384.pdf

24 http://www.bbc.co.uk/blogs/thereporters/stephanieflanders/2011/01/measuring_the_vat_squeeze.html

25 http://www.visitbritain.org/Images/VisitBritain%202011%20Forecast%20Report_tcm139-198761.pdf

VisitBritain forecasts that inbound visitor numbers will show a growth of 1%, though visitor spending in 2011 will, in real terms, be around £0.5bn below the record level set in 2006.

- Government targets for domestic tourism. In 2008, the amount spent by UK residents on domestic overnight tourism accounted for 36% of their total tourism spend, government wants this to increase to 50%.

Demographics and society[26]

- The UK's population is getting older
  The UK population is aging. Over the last 25 years the percentage of the population aged 65 and over has increased while the percentage of the population aged under 16 decreased. The population is forecast to reach 10.8 million over 65s in 2012. This trend is projected to continue. It has widely been considered that this older generation is a powerful economic force, with sufficient disposable income to enjoy shortbreaks and regular holidays. However, recent economic events have affected pensions and the grey market may take a more cautious approach to spending than in previous years.
- The family / party composition is changing and requires flexibility
  Families are shifting from being largely 'flat', with many members of a similar age, to families with a greater spread across the generations. Due to a high divorce rate, there is an increasing number of 'non-traditional' family units (i.e. single parent families, families with step-siblings). Spending time with groups of friends, extended families and interest groups is a primary motivation for a break or holiday.
- The continued emergence of the lesbian and gay market
  The gay market is typically seen as a high spending and affluent sector – but one with specific demands.
- Widening younger markets, with greater economic power
  Young people are staying at home longer and delaying marriage and parenting. The consequence is an increase in pre-family travellers. The delays in parenting also mean families are getting older (and more sophisticated and affluent). Similarly the empty nest market will less likely be 45+ but more likely to be 55, or even 60+.
- Shortbreaks, a solution for the time poor
  Society has become increasingly 'cash rich, time poor' with shifting patterns of trip taking to higher frequency shortbreaks.
- Tourism is becoming increasingly experiential
  Tourists are looking for immersion in a culture, unique experiences, authenticity, exploration, adventure and personal fulfilment from their holiday experience. The 'what' is more important than the 'where'.
- Chameleon consumers
  Consumers are not only becoming increasingly fragmented, with markets more specialist and niched, but also changeable – i.e. the same individual may fall into

[26] www.statistics.gov.uk and ETC / UNWTO 2010 Demographic Change and Tourism and http://www.enjoyengland.com/Images/short%20breaks%20market%202006_tcm21-172123.pdf.

one segment for one break and another later (e.g. a family holiday one moment and a mountain biking trip with friends the next).

Environment

- The tourism industry will need to respond to climate change
  The tourism sector, like the rest of the economy, will need to respond to climate change, not only to progressively reduce and mitigate its greenhouse gas (GHG) emissions and reduce water consumption, but also to adapt tourism businesses and destinations to changing climate conditions. Tourism operations will also be expected to help change travel behaviour and to respond positively to changes in transport modes. There is a need to be prepared for extreme weather events such as storms and flooding, drought and heat wave. Some evidence suggests that an increase in these events is already occurring. Alterations to the world's climate could affect the appeal and competitiveness of tourist destinations worldwide. As Mediterranean resorts heat up, British destinations may become more appealing in the summer months.
- Consumer demand for greener holidays[27]
  VisitEngland research has highlighted that over half of those surveyed expressed an interest in staying in accommodation with environmentally friendly practice, and a similar number are interested in breaks which benefit the local community. Interest in sustainable holiday behaviour is greatest among younger age groups.

  The majority of consumers are happy to accept elements such as re-using towels and accepting a room with a shower rather than a bath. Over half of those surveyed would choose accommodation supplying local food or accommodation with a green award if two hotels were otherwise the same. A similar proportion say that they like to know that accommodation is doing its 'bit' for the environment. In summary, people increasingly want to act in a green way but lack sufficient information to make an informed decision. However, consumers are not generally prepared to pay more for a green option and being 'green' is not a real motivator for most people. That said, this is likely to change and now is a good time to start to position a business as a green business
- Peak oil: a tipping point for transport and fuel costs[28]
  Peak oil production (the maximum rate of extraction, after which production declines) is estimated to be reached by 2020, though some analysts believe we have already reached this point. In any event, future oil production volumes are unlikely to rise much above the record global extraction rate achieved in July 2008, and this will not match rising global demand in the future.

---

[27] VisitEngland Sustainability Consumer Research: http://www.enjoyengland.com/Images/Sustainabilty%20consumer%20research%20-%20March%202010_Layout%201_tcm21-186775.pdf.

[28] The Oil Crunch, A wake-up call for the UK economy, Industry Taskforce on Peak Oil & Energy Security (February 2010).

The oil crunch has serious implications for travel and tourism, both in terms of heating and fuel supplies and in terms of travel and transport. In the UK in 2007, 75% of holiday trips were made by car compared to 19% by public transport and 3% by air. UK residents made 69 million trips abroad, mainly by air. With regards to travel within the UK, we will need to see a shift from private car use to public transport while air transport (both arrivals and departures) may be restricted due to increasing costs and surcharges. This points potentially to a greater reliance on domestic tourism and a rise in city breaks. Demand for rural breaks in remote areas will need to be met by more efficient and better quality transport provision by the private sector.

Technology

The last major fundamental innovation on the internet was social networking. It was not technology-led and it has been suggested that there may be no more major technical changes to come. But certainly there will be a huge range of new and more joined-up services. These will be driven by capacity improvements – speed and quantity of data transfer and processing. If capacity keeps on improving at the present rate only our imagination and energy will limit us.

Key changes at the moment are summarised as follows:

- Online communication will go on growing as it gets faster and more reliable
  Don't underestimate the future effect – remember the difference when broadband replaced dial-up. Imagine a further 10-fold improvement – not just yet; but of all the possible new developments, that's the one that will make the most difference to businesses.
- Convergence of devices is beginning to happen
  PCs and phones are beginning to share their capabilities, and TV is not far away. There will still be a spectrum of experiences, from big-screen imagery and surround-sound to go-anywhere mobile convenience.
- Convergence of tourism services will have more impact than convergence of devices
  The impact of devices and services on tourism may be bigger than anything the internet has given us so far. Already new travel planning services are emerging such as Gliider, Tripbase, Jetsetter, Traxo and TripIt. They aim to support the customer from Dreaming to Booking to Repeating or Recommending.
- Communication on the move will become commonplace
  Smartphones will be the point of first contact for most communications, including tourism searches, enquiries and bookings. Smartphones are rapidly becoming smarter than PCs in some respects. Smartphone users usually see their messages (on social sites, in texts and e-mail) on their phone before their PC.
- Information exchange is crucial
  It will be essential for local businesses to share and re-distribute each others' information to enhance their offers and gain more market reach. In addition, while websites will remain important, this will not be as important as being talked about and listed on other web pages.
- Big multi-national companies are an opportunity, not a threat

Firms like Google, Apple and Expedia will control the channels and the content, as they do in most walks of life - but small businesses will still be able to improve their visibility even further.

- Social networking will increase in importance
  Online networks will be a vital channel for businesses for distribution, awareness creation and recommendations. Small businesses will be using technology and the personal touch to get the edge on their larger competitors, largely via social networking.
- Technologies specifically for attractions[29]
  There are a number of emerging technologies which are of specific relevant for visitor attractions. These include:
  - QR codes. This process involves the visitor using their (internet and camera enabled) mobile device to 'scan' special barcodes mounted on panels / countryside furniture / sculptures with the device's inbuilt code reader. Upon the device recognising a code, it launches its internet browser and directs the user to a specific website / image / video or piece of Internet hosted interpretive copy.
  - Augmented reality. Utilising the inbuilt GPS and directional compass functions of the latest generation of smartphones and PDAs, it is possible to geographically 'tag' landscapes to present an enhanced or 'augmented' view of reality. Users view this augmentation through the device's camera viewfinder and an augmented reality browser.
  - Bluetooth. 'Bluetooth' is a means of exchanging data between fixed and mobile devices wirelessly over short distances. It is particularly useful in allowing users (with bluetooth enabled mobile devices) to access interpretive content where there is little or no mobile phone or internet data signal. Images, audio, video, text and small interpretive Java applications can be transferred over bluetooth connections.
  - GPS. GPS is becoming increasingly standard on mobile phones and GPS specific handheld devices can now be purchased from as little as £15.00. This presents opportunities for using GPS interpretively, both as a means to access location activated 'trig points' for the playback of relevant multimedia based material and for the transformation of a landscape into a gaming arena to encourage outdoor interaction and discovery.
  - Virtual tours. Virtual tours of a site, or specific building or part of a site, that can be used to provide a high degree of virtual access to users unable to interact with them physically. Particularly useful in historic buildings in which new physical provision (lifts, stairs etc) cannot be installed, tours allow users complete 360° views of a room or landscape with zoom functionality and can be further enhanced with text, audio and video based interpretive provision, thereby providing an experience as close as possible to the 'real thing'.

Key trends relevant to Staffordshire Moorlands

Canal boating and other canal activities

[29] Natural England (2010), Successful Visitor Engagement

According to British Waterways (BW) Annual Report (2009-2010)30, in 2009 an estimated 13 million people, or 28% of the GB adult population, visited a UK waterway, up from 11 million in 2008. The BW marketing campaign has played its part in attracting more people, but other factors such as the weather, the economy and trend for 'staycations' also had a significant impact. Despite the economic downturn, the number of boats on all BW canals and rivers has increased by 3% with 34,944 boats licensed (2008/09: 33,831).

Visitor satisfaction is high, with customer's experience measured by asking them about their 'propensity to recommend'. In 2009, 56% of towpath users and 44% of boat owners said they would 'definitely' recommend waterways to others. Taking into account 'probably' and 'possibly', responses which is more comparable to other industries, the score rises to 95% for towpath visitors and 89% for boat owners.

Boat numbers on BW managed waterways are as follows:

2001	25,401
2002	26,334
2003	26,426
2004	26,240
2005	27,078
2006	29,000
2007	30,905
2008	32,566

BW's Boat Owners Survey 2009 reports that the proportion of boaters taking 6-10 trips in 2009 has increased at the expense of those taking 0-5 trips. Average total boat-related spend in 2009 was £3,873 – primarily mooring fees (average £1,634), maintenance (£733) and licence fees (£692). There has been a significant increase in reported mooring and licence fees in 2009 for England & Wales. Average spend per head per day in 2009 was £24.73. Following reductions in perceived congestion between 2006 and 2008, 2009 once again saw an increase (30% affected by congestion in 2009 versus 25% in 2008).

Regarding the future, the BW proposal (launched in May 2009) to move the nation's canals and rivers into the charitable sector has created much interest and positive discussion. A move to become a charitable trust is considered the best way to create a long-term sustainable future for the waterways.

While data specific to the economic and social benefits of canal-related programmes are limited, wider initiatives to create or enhance linear green spaces and recreational routes, such as canal corridors and waterway paths, are illustrated by the following data:

Recreation and tourism:

[30] http://www.britishwaterways.co.uk/media/documents/Annual_Report_and_Accounts_2009-10.pdf

- The Nottingham Beeston Canal attracted 400,000 visits by commuters, joggers, cyclists and dog walkers in 2008 (British Waterways). This will be increased by the 'Big Track' waterways paths project (British Waterways)
- It has been estimated that the Liverpool Canal Link project may attract an additional 200,000 visitors annually to the Liverpool Waterfront, who may spend an extra £1.9m each year (www.waterscape.com)

Economic benefits:

- An independent study of the Wales canal network has shown that an annual investment of £3 million generates £33 million visitor spend along the canal corridors and supports over 800 full-time equivalent jobs (British Waterways)
- The proposed creation of the Bedford & Milton Keynes Waterway, including opening of the waterway and development of the towpath, picnic sites, marina and an iconic attraction (cf. Falkirk Wheel) could attract 0.5m to 0.75m visits/year with a gross spend of £13.8m to £20.7m and create one-off benefits of 2,370 to 2,925 person-years of employment and an uplift of £45m in property values (SQW Consulting)
- Projects such as the Kennet and Avon Canal restoration, Birmingham Waterfront and Llangollen Mooring Basin have found that waterside properties command an average premium of 15 to 20% compared to similar properties away from the water (Swindon Borough Council)

Sustainability benefits:

- Waterway paths could encourage modal shift from car-based travel to walking and cycling as research shows that almost one-quarter of car trips are under two miles – a distance which can easily be walked or cycled (Dept. of Transport)
- Use of the National Cycle Network in 2006 is estimated as having saved over 450,000 tonnes of CO_2 – the equivalent of taking 200,000 cars off the road (SQW Consulting)
- According to Sustrans, the average school trip is just over 3 miles, but cycling that distance takes less than half an hour. And children are keen to cycle to school - 31% of them would like to, but only 1% do.

Countryside walks and nature orientated activity

In 2005, 63% of adults in England had made a Leisure Visit within the previous week. In 2005, 52% of the adult population had taken a trip to an inland town/city during the previous week, whilst 19% had visited the countryside on such a trip[31].

With regarding to National Parks in particular[32]:

- About 58% of visitors come to enjoy the scenery and landscape, which makes this the main reason for visiting a National Park.
- About 68% of visitors are families, most coming in a group with under five people.

[31] Natural England England Leisure Visits Survey (2005)

[32] http://www.nationalparks.gov.uk/learningabout/ourchallenges/tourism.htm#whyvisitorscome

- Most visitors come from the densely populated South-East region, near London or from the regions closest to National Parks.

There are two categories of visitors, day visitors and holiday makers. People on day trips come to the National Park from home to enjoy a day in the National Park. Holiday makers stay in accommodation in or nearby the National Park.
The most popular activities visitors do in National Parks are:

- Walking (40%).
- Driving around and sightseeing by car (19%)
- Relaxing (12%)
- Visiting towns and villages (10%)

A smaller percentage of people were involved in other outdoor activities like horse riding, climbing or kayaking.

According to the Ramblers Association[33]:

- According to Britain's most comprehensive survey of sport and recreation participation, 9.1million adults in England, or 22% of the population, walk recreationally for at least 30 minutes in four weeks. This is almost twice the number that swim (5.6million, 13.4%), more than twice the number that go to the gym (4.5million, 10.7%) and nearly three times the number that cycle (3.5million, 8.5%).
- Walking is the joint most popular activity (along with eating out) for people taking days out in England, and the most important reason for 18% of the 3.6billion trips per year. It is the main activity on 36% of countryside and 33% of seaside visits and the most popular activity for UK visitors to Scotland and Wales.
- The popularity of leisure walking appears to be rising. The number of English adults walking recreationally for at least 30 minutes every month increased by 954,700 (around 10%) between 2006 and 2008.

Adventure play (cycling, climbing, horse riding)

There is little data readily available for the following, nevertheless the following figures do give us some indication of recent trends.

- Cycling. In the last 12 months up to September 2010, British Cycling Membership increased by 16% to 33,000 members in total. The new Ride membership for non racing cyclists has played a significant role in the rise of numbers and has proved the perfect alternative to the Race memberships of, Gold, Silver and Bronze. In the first year of its inception, 3,000 people have already signed up to 'Ride'[34].
- Horse riding. 2.1 million people ride at least once a month with a further 2.2 million riding less frequently with the implication that as well as the solid core of regular riders, there is large potential for growth. The fastest growing group are women

[33] http://www.ramblers.org.uk/Walking/policy/caseforwalking/participation.htm

[34] http://www.britishcycling.org.uk/zuvvi/media/bc_files/corporate/BC-ANNUAL-REPORT-2010-WEB.pdf

aged 25 - 44 years old with a slight increase in the number of men taking up horse riding[35].

- Climbing. In 2009 there was positive growth in individual membership of the British Mountaineering Council. At year end they had 46,852 individual members, an increase of 5565. BMC had 71,112 combined individual and club members at year end. This is 3558 more than in 2008. Total membership was made up of 46,852 individual members and 24,260 club members split between 238 clubs and 57 student clubs, a total of 295 clubs. This is a decrease of 12 clubs for the year.[36]
- Golf. According to English Golf Union 2010 Golf Club Membership Questionnaire Results[37], membership levels have been in decline since 2004. 22 clubs in Staffordshire report that they have membership vacancies. In response to this decrease the EGU are supporting golf clubs to adapt and become more proactive in their approach to membership by offering more flexible packages and opportunities. The only age category to experience an increase in membership numbers is the 71 years + group and it is vital that golf clubs recognise the needs of each specific age group.

Visits to attractions [38]

According to Visitor Attractions Trends in England 2009 , visitor attractions reported a +5% increase in visitor admissions overall in 2009. The trend towards domestic overnight stays and away from overseas trips is likely to have contributed towards this strong increase. There has also been a strong trend towards day trips, with attractions reporting an +8% increase in visitors who live locally/within day trip distance in 2009.

Some salient points can be highlight from the Visitor Attractions research for types of attraction relevant to Staffordshire Moorlands:

	Gardens %	Heritage centres %	Steam / heritage railway %
Growth	+10	+5	+7
Increase of local visits	+31	+14	+12
Gross revenue	+11	+13	+12
Admission charge	+3	+3	+4

With regards to admission charges the average charge has risen from the rise from £5.22 to £5.38 for gardens, from £4.73 to £4.88 for heritage centres and from £6.83 to £7.11 for steam / heritage railways.

---

35 British Horse Industry Confederation http://www.bhic.co.uk/about/pressarchive/news.php?4

36 British Mountaineering Council http://www.thebmc.co.uk/bmcNews/media/u_content/File/your_bmc/annual_reports_and_accounts/Annual%20Report%20FINAL%2009.pdf

37 http://www.englishgolfunion.org/showpage.asp?code=0001000100010026

38 http://www.enjoyengland.com/Images/Finalversionofreport2010_tcm21-194597.pdf

Anecdotally there is some evidence to suggest the increasing popularity of steam / heritage railways as evidenced by 2005 figures:

- The North Yorkshire Moors Railway, passenger figures were around 1000 up on 2004, ending the year at 303,887.
- The Severn Valley Railway, broke through the 250,000-passenger barrier for the first time, while reporting a record turnover of £4.25-million.

It is difficult to make any definite predictions from this, other than to observe the popularity of relevant attractions such gardens, and the increased in day trippers. According to the Visit England attractions quarterly report, attractions remain generally cautious about the immediate future, with slightly fewer attractions more positive than less positive about Q4 2010. The larger, urban attractions are most positive.

Food and drink

UK consumers' shopping habits and cooking and eating patterns demonstrate an increasing interest in the taste, quality and origin of food. In particular, there is an increased demand for local and regional foods. The diversity of products in shops and on menus is greater than ever before[39]. 70% of British consumers want to buy local and regional food and 49% – every second person – want to buy more than they do now[40].

The following findings have been identified by DEFRA research which looked at consumer attitudes and buying behaviour for local and regional produce[41]:

- There appears to be a growing demand for local and regional food and drink which is essentially consumer-led. About half the respondents in the DEFRA survey stated that they bought local produce for use at home, and a quarter when eating out, in the last week.
- 'Regional' has quality and premium associations, based on tradition and reputation.
- Positive attitudes and greater awareness have been bolstered through the growth of farmers' markets, and TV coverage and advertising, which promotes the advantages of local and regional produce.
- When local and regional produce are eaten out, the main venues are pub restaurants and bistros, and quality restaurants.
- The key reasons for buying local produce are freshness, taste and quality of the produce; support for local producers, retailers and the community; perceived sustainability benefits; and known provenance of the produce.
- Barriers to buying local produce are cost, availability, a lack of information on what and where to buy, and limited promotion.

---

[39] Cabinet Office, 2008 Food Matters: Towards a Strategy for the 21st Century

[40] IGD Report, March 2005

[41] DEFRA, 2008 Consumer attitudes and purchasing behaviour with particular reference to local and regional foods

"Food tourism today is where eco-tourism was 20 years ago; people are starting to take an interest… it is representative of a new and growing phenomenon within the international industry… The industry needs to take note and use the opportunity to its advantage. Holidaymakers want a hands-on experience and food is a manifestation of a destination's culture."
[Fiona Jeffery, Group Exhibition Director of World Travel Market]

Accommodation

Self catering

Year	Total no trips in sector in England	Total number of trips in England	Sector as % of total
2006	4163	101834	4.1
2007	4801	100181	4.8
2008	4257	95533	4.5
2009	5364	102958	5.2
% Growth 2006 - 2009	22.4	1.1	

Source: UKTS
N.B. Figures shown in thousands

Self catering trips in England are summarised from UKTS data (2006-2009) in the above table. From the table we can see that the sector has increased from 2006 – 2009 22.4% in England.

Guesthouses

Year	Total no trips in sector in England	Total number of trips in England	Sector as % of total
2006	1691	101834	1.7
2007	1501	100181	1.5
2008	1600	95533	1.7
2009	1526	102958	1.5
% Growth 2006 - 2009	-10.8	1.1	

Source: UKTS
N.B. Figures shown in thousands

Guesthouse trips in England are summarised from UKTS data (2006-2009) in the above table. From the table we can see that the sector has seen a decline from 2006 – 2009 – -10.8% in England.

Hotels / motels

Year	Total no trips in sector in England	Total number of trips in England	Sector as % of total
2006	29972	101834	29.4
2007	30292	100181	30.2
2008	29985	95533	31.4
2009	32423	102958	31.5
% Growth 2006 - 2009	7.6	1.1	

Source: UKTS
N.B. Figures shown in thousands

Hotel / motel trips in England are summarised from UKTS data (2006-2009) in the above table. From the table we can see that the sector has increased from 2006 – 2009 – - 7.6% in England.

Caravan and camping

	Total no trips in sub-sector in England	Total no trips in sub-sector in England	Total no trips in sub-sector in England	Total no trips in sector in England	Total number of trips in England	Sector as % of total
	Camping	Towed	Static (owned & rented)			
2006	3653	3346	5071	12070	101834	11.85
2007	4036	3723	4838	12597	100181	12.57
2008	3103	2984	4768	10855	95533	11.36
2009	4246	3825	5752	13823	102958	
% Growth 2006 – 2009	16.23	14.32	13.43	14.52	1.1	13.43

Source: UKTS
N.B. Figures shown in thousands

From the tables above below we can see that caravanning and camping has seen significant growth in from 2006 – 2009 - 14.5% in England. By sub-sector camping in particular has shown an increase of 16%.

These figures should be viewed with some caution as UKTS year to date figures indicate declines in volume and value across many sectors. The exceptional performance in 2009 for both self-catering and camping will have benefitted from the recession effects and therefore the upturn may be short term rather than a more fundamental trend.

Appendix 2: Sustainability Case Studies

'Small steps'

Cumbria House

Cumbria House is an 8 bedroom B&B sleeping 12 people with 4* grading situated at Keswick in the Lake District.

Key actions:

- Installed new central heating boiler and added thermostats to each radiator
- Central heating tanks and pipes lagged (300 – 400m of pipes in total)
- Ambient temperature set to 20°C with heating time controlled to early mornings and evenings only
- Compact fluorescent light-bulbs installed or dimmer switches and used as needed
- Electrical appliances are all A or AA rated for energy efficiency
- Appliances turned off when not in use – no standby
- Guests receive discount for arriving by public transport or non use of car during stay
- Washing dried naturally on lines in preference to tumble drying
- Duvets and towels are not ironed but hung out to remove creases
- Lined curtains and shutters provide extra insulation
- Hippos installed in WC cisterns
- Racks installed on each landing for guests to recycle bottles / cans / paper

Costs / Benefits:

- Costs have been a steady transition as appliances needed to be replaced naturally with energy efficient models
- The low emission light bulbs are initially more expensive but save in the region of £150 over the lifetime of the bulb
- The most significant cost for the business is offsetting its CO2 emissions through Climate Care – approx £100 per year
- Guests choose to come because of the business' environmental credentials, often they leave having learned something themselves.

The Priory

The Priory is an 8 bedroom hotel and restaurant near Garstang situated on the edge of the Forest of Bowland

Key actions:

- Encourage an electricity diet
- Fit low energy light bulbs
- Install sensors, time switches and room isolators

- Re-use towels unless asked not to
- Recycle cardboard, plastic, paper,
- Compost uncooked foodstuff from the hotel
- Installed waste compactor.

Costs / Benefits:

- Measures are planned against a three year cost/benefit analysis - the waste compactor will pay for itself over three years compared to the cost of commercial waste collection
- Other waste is contracted on an ‘as needed’ basis so the hotel controls how often and therefore how much it costs
- Waste is monitored via the necessity and frequency of commercial collection required
- Standard light bulbs cost £10 per week to purchase. Low energy light bulbs require one order and are changed less frequently so it is one less maintenance task
- Energy use is monitored from invoices recorded on a profit & loss analysis. Energy bills are steady at a time of price increases
- Wide publicity and promotion of the hotel because of its sustainable business policies and recognition as a best practice business resulted in 20 minutes of prime time BBC coverage.

Manchester Youth Hostel

The Manchester Youth Hostel is a purpose built venue with three meeting rooms, it can sleep up to 144 people and is situated in the city’s Castlefield area.

Key actions:

- Improving lighting controls by installing PIR sensors in some areas, and installing TRVs on all radiators.
- Switch to a renewable energy supplier saving about 100t of CO_2 pa
- Notices to switch off lights when not in use
- Encourage guests and staff to use environmental travel options by giving advice
- Recycling paper, cardboard, cans etc bins in common areas
- Works with local company Emerge on recycling and organised business to business waste swap schemes.
- Prepare Environmental Business Plan
- Trading with other environmentally conscious businesses

Costs / Benefits:

- The recycling costs initially looked high but have been offset by equivalent savings on refuse collection

- Installation of thermostatic controls cost £3,000 and was repaid within 12 months
- Manchester YHA environmental credentials make it desirable for other organisations to do business with, especially those with ethical/sustainable purchasing policies
- As a conference destination it will regularly host events for Co-op, Oxfam etc
- Awareness and experience means a higher profile – internally within the YHA and externally from media interest.

'Huge leaps'

Swansea Valley Holiday Cottages

The Swansea Valley Holiday Cottages 'Carbon Neutral Cottage Holiday Scheme' allows guests to offset the environmental impact of their cottage holiday through climate-friendly projects (such as tree planting) at their farm in the Swansea Valley. They use a carbon calculator to estimate the amount of carbon emitted as a result of an average one-week family holiday at one of their cottages including driving emissions and energy use in the cottage.

Guests are offered three options to carbon neutralise their holiday:

- Climate friendly fund. Guests pay £10 on arrival which is placed in a fund to carry out climate-friendly projects at the farm
- Planting an oak tree. For £10 guests are provided with an oak sapling which they can plant in the woodland area behind the holiday cottages
- Plant a specimen tree. For £50 guests can plant a specimen tree with protective guard in one of the parkland fields at Plas Farm.

Lombard Farm

Lombard Farm, Cornwall, who aim minimise impact on the environment and minimise your carbon dioxide emissions. They currently use a green tariff for all electricity and low energy light bulbs wherever possible, they also have a small solar photovoltaic (PV) panel for the lighting in their yurt. The house uses only solar thermal and woodburners for all heat and the Link showers are heated by solar thermal when the sun shines. All cleaning and washing products are eco-friendly and there are recycling facilities for most waste. An annual tree-planting program offsets carbon dioxide that is produced by the use of existing oil-fired equipment and they have already planted over 1,500 trees.

They plan to only use renewable fuels. This will include biomass boilers for underfloor heating in, solar thermal water heating for domestic hot water and creating all our own electricity with wind turbines, pv and Combined Heat and Power units (CHP) running on locally grown biodiesel or coppiced wood, when there is no wind.
Local journeys will be by electric car and longer journeys by diesel vehicles running on biodiesel. All water will come from local springs and their own well.

The New Forest National Park

The New Forest National Park is an example of a well-rounded destination which follows the various aspects of the VICE model and which has taken some small steps, but is moving towards more radical changes encouraging a change in transport modes. The park was the winner of a 2007 Virgin Holidays Responsible Tourism Awards and have undertaken a number interlinked activities to improve their overall sustainable performance.

In the New Forest Green Leaf Tourism Scheme (GLTS) businesses are committed to supporting:

- Forest friends visitor stewardship – visitor gift aid and key messages in all marketing/communications. In liaison with the Forestry Commission businesses learn about forest management, sensitive habitats, recreational issues etc cascading that to staff and then to visitors.
- Community tourism – supporting and establishing positive relationships with the local communities of the New Forest and engaging them in sustainable tourism and destination management.
- Landscape conservation / biodiversity – businesses helping to support wildlife from putting up bird and bat boxes to planting native British trees.
- Car-free tourism – working with rail, air and bus operators to reduce the amount of visitor traffic including car-free discounts from hotels and businesses, a New Forest Tour bus to pick up and drop off walkers and cyclists and 100 miles of off-road cycling tracks.
- New Forest Marque produce – fresh, environmentally friendly, locally distinctive and free range produce. Pork from forest roaming pigs, locally reared beef and venison, local cheeses, wines, vegetables, sea foods and the New Forest Breakfast etc..
- Energy, waste and recycling initiatives – a commitment from businesses to create their own plan to reduce waste and improve energy efficiency in all aspects of their operations.

Specific actions to reduce the impact of car use are as follows:

- **Encouraging visitors to give the cars a rest.** In 2007 15 major accommodation providers (630 bed spaces) banded together with the New Forest District Council (NFDC) to support the Car Free initiative. These properties encourage guests to either visit the forest without their car or to leave their car in the car park during their stay. Incentives include 10% discount on the room bill on production of rail tickets or car keys for the duration of the stay. Free pick up and drop off at railway and bus stations, cycle hire discounts etc.
- **Electric Cars.** The National Park has co-funded a project to bring 10 electric cars into the Forest for hire by visitors. These cars arrived in June 2007 and are located in Brockenhurst, Burley and Lyndhurst at recharge points using green energy. Available for tourists to hire, these cars will have a nil carbon footprint, it is hoped, will encourage more visitors to come by train.

- **New Forest Tour Bus.** 2007 is the year the New Forest Tour bus proved itself and HCC, New Forest District Council and the National Parks Authority have invested in 2 new low-emission buses. This circular open top bus tour encourages visitors out of their cars. Its popular hop on and off format and cycle carriage means that visitors can see all the main sites with lowest impact on the forest whilst linking to 192 miles of car free cycle networks.
- **Careys Manor Hotel and Spa.** Has purchased a mini-bus to ferry guests to and from the station. They also offer a 10% discount for guests coming by train. Careys Manor has reported making 6-8 journeys per day to pick up guests from the station. Representing 9% of guests now coming by train.
- **Cottage Lodge B&B.** Cottage Lodge advertises the car free aspect of their product highly on their website. They offer reductions on bike hire, free bike storage and access to electric cars. They also offer free tea and cakes for anyone coming to the forest by train. This season, for the first time, Cottage Lodge is reporting visitors arriving by bike as part of a cross country tour. Cottage Lodge is averaging three couples staying in the property at any one time who arrive without a car. This represents 25% of their customers.

The National Trust – Encouraging a greater choice in leisure travel[42]

In recent years the National Trust have been encouraging a greater choice in leisure travel by:

- Participating in over 28 schemes to provide car-free leisure across the country in partnership with local authorities, public transport operators and other attractions
- Investing over £100,000 into setting up and running transport projects
- Marketing and promoting car free leisure journeys with campaigns such as the promotion offering rail passengers 'two for the price of one' admission to National Trust properties, in association with the Association of Train Operating Companies
- Making leisure journeys by public transport fun by introducing open top buses, ferries, tour guides and even steam trains
- Encouraging cycling visits to properties, with over 200 National Trust properties now located within 2km of the National Cycle Network
- Developing visitor travel plans to manage pressure, and restricting parking at several of our properties
- Promoting sustainable access to properties by providing information on how to arrive by foot, cycle, bus and train.

Until recently schemes have concentrated on incentives (such as reduced entrance fees for those arriving without a car). The main benefit is seen in providing incentives which attract a new type of visitor, rather than encouraging people to change their preferred means of travel.

---

[42] National Trust 2005, Visitor Travel Policy from Practice

The National Trust have identified a number of benefits, not least in terms of economic advantage:

- Encouraging alternative means of transport such as cycling or walking brings money into the local economy - tourists on cycling holidays spend almost £20 a day more than the average for UK holidays
- Conversely, congestion on the lanes which approach Castle Drogo led to two coach companies to drop Castle Drogo from their itineraries in 2004. This resulted in a loss of 4,000 visitors
- Providing public transport access to rural leisure sites helps people without cars to enjoy the nation's natural and built heritage
- Encouraging cycling and walking delivers wider health benefits
- Transport schemes established for tourists can benefit local communities in meeting their transport needs
- Off peak promotions can increase visitor numbers substantially in the low season
- A well run service can add to the visitor experience, as the journey becomes an enjoyable part of the trip.