

# High Peak Retreat Luxury Glamping Demand Report

Produced for and on behalf of High Peak Homes Ltd.  
3, The Quadrant. Buxton. Derbyshire. SK17 6AW.

By

The South West Research Company Ltd.

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# Key point summary



# Summary of Key Findings

This report, commissioned by High Peak Homes Ltd. 3, The Quadrant. Buxton. Derbyshire. SK17 6AW, provides evidence of the likely demand for the proposed development of a unique luxurious glamping experience for visitors at a site on land off Long Lane, Chapel-en-le-Frith, High Peak, Derbyshire. SK23 0TQ.

The proposal is designed to be low impact, low density and a high quality tourism asset for the area which will support the local economy and provide new employment opportunities. The proposed site lies to the South of Chapel-en-le-Frith High School / community sports fields and approximately 600 meters from the station at Chapel-en-le-Frith. The station is approximately 20 miles south east of Manchester Piccadilly on the Buxton Line from Manchester. The site is accessed from Long Lane which leads to the B5470 Manchester Road and the A6 which lies approximately 1.2 miles to the East of the application site. The proposal for High Peak Retreat involves no permanent buildings and is proposed to be for seasonal use only (1st March to 31st October).

The proposed development will consist of the following elements:

- The creation of a small scale, high quality holiday retreat with Glamping Pods / Safari Tents / Yurts and Shepherd's Huts (15 holiday accommodation units in total), together with 5 Motor Caravan pitches (non-trailed units).
- The proposal concentrates on low key, quiet recreational activities such as walking, cycling, fishing, bird watching, pony trekking / horse riding, with on-site activities such as Yoga and fitness classes within a Yurt style structure. Wildlife walks and a nature conservation / wildlife habitat area would be created on the northern section of the application site to create wildlife corridors and increase bio-diversity on the site.
- The Pods / Yurts / Shepherds huts would all be mobile structures (not permanent) and would be removed during the closed period and located in the storage area / the two proposed timber field shelters adjacent to the southern boundary.
- Toilet and washing facilities are proposed to be incorporated in a timber clad Pod style unit (mobile structure) or a Shepherd's Hut, rather than building any permanent structures on site.
- Reception is to be located in a timber Pod style unit located at the entrance.
- To maintain the effect of a green sward during the winter (and to minimise potential visibility of the site from higher ground such as Castle Naze), the access track to the Pods / Yurts and the Motor Caravan pitches are proposed to be created using a grass reinforcement system such as 'Golpla', which has the appearance of a grass sward. There would be no tarmac or surfaced access roads within the site.
- Access to the site is proposed from Long Lane and along the lane beneath the railway arch leading to Down Lee Farm. The entrance to High Peak Retreat would have a 6.0m radius bellmouth on either side of the entrance which would be hard surfaced with tarmac for the first 10m leading into the site, the access road would then be constructed using a grass reinforcement system.

# Summary of Key Findings

- A collection service from the nearby Chapel-en-le-Frith railway station would be offered to holidaymakers visiting High Peak Retreat by train, to reduce car journeys and to encourage use of public transport.
- Bicycle hire would be offered on site and charging points for electric cars would be located on site to further encourage the use of sustainable modes of transport.
- Additional screening of indigenous tree and shrub species would be undertaken along the south eastern boundary adjoining the lane. The holiday units (Yurts, Pods and Shepherd's Huts) are proposed to be located in the southern section of the application site. Additional screening of native tree and shrub planting would be undertaken on the northern section of the site to assist with screening of the adjacent High School and Playing Fields.

The overwhelming message from all the evidence provided within this report clearly demonstrates that there is indeed demand for such a development in the local area and that it would enhance the local accommodation offering currently available in what is a growing sector for UK tourism.

The development is likely to have a wide appeal and is by no means a niche market being targeted and, as such, the accommodation at the site is likely to appeal to a similar demographic to the one that is already visiting the East Midlands and the Peak District National Park. Developments of this nature in rural areas are well documented as playing a significant role in supporting the local economy and the economic impact estimated to be associated with visitors to the proposed new development, assuming it achieves average levels of occupancy, show that;

The proposed development will provide an estimated £390,000 of business turnover for the local economy supporting approximately 14 actual jobs, 9 of which will be the new jobs at High Peak Retreat based upon Cambridge Model data. Sectors outside of the development will all benefit from the spend of visitors staying at the site with employment supported in retailing and catering through the direct visitor spend.

# Background



# Background

The South West Research Company has been commissioned by High Peak Homes Ltd. 3, The Quadrant. Buxton. Derbyshire. SK17 6AW to undertake a demand study to provide evidence of the likely demand for the proposed development of a unique luxurious glamping experience for visitors at a site on land off Long Lane, Chapel-en-le-Frith, High Peak, Derbyshire. SK23 0TQ.

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# Background

The application site is accessed from Long Lane which leads to the B5470 Manchester Road and the A6 which lies approximately 1.2 miles to the East of the application site. The application site is bounded to the North by residential development and a railway embankment (with railway line) to the East, with residential development beyond. To the South of the site lies Down Lee Farm and to the West lies Marsh Hall farmhouse and barn (Grade II Listed). Approximately 0.8 miles away to the South of the application site lies the scheduled promontory fort at Castle Naze.



Tourism plays a significant role in the economies of the East Midlands and Derbyshire and the chosen location for this proposal will diversify and build upon the standard of existing tourism accommodation and product offered in the area.

This report looks at the UK holiday park and campsite sector, alongside relevant tourism data to provide evidence of the likely demand and impact of this proposed development.

# The UK Holiday Park, Campsite and Glamping Sector



# The UK Holiday Park, Campsite and Glamping Sector

## Introduction

In more recent years the UK holiday park and campsite sector has been enjoying a huge uplift in popularity – not least as a result of the economic slowdown which has impacted significantly on the sector as UK tourists opt for a “staycation” at a cheaper UK destination rather than the more expensive foreign holiday option. As well as direct employment, these parks and sites support many other regional and local businesses and their workers with local shops, pubs, restaurants and visitor attractions all benefitting from holiday park guest expenditure.

The definition of a “holiday park” ranges from individual touring and camping sites to full scale resorts with leisure, food and beverage operators. It can include:

- Stays in rented caravan holiday homes or lodges
- Privately owned caravan holiday homes or lodges
- Touring caravans & motorhomes
- Camping holidays on park pitches
- Stays at holiday camps and villages

A new study ‘Pitching The Value’ published in February 2019 has analysed the value of the UK holiday park and campsite sector to the nation’s economy, estimating that it generated a staggering £9.3 billion in visitor expenditure in the UK in 2018.

The independent report commissioned by the UK Caravan and Camping Alliance (UKCCA) which is an umbrella group comprising The National Caravan Council, The Camping and Caravanning Club, the Caravan and Motorhome Club, and the British Holiday & Home Parks Association, showed that the sector supported over 170,000 full-time equivalent jobs and that parks and campsites spent over £300 million per year in capital expenditure, wages and day-to-day operations. Collectively, their contribution to local economies is both substantial and irreplaceable.

# The UK Holiday Park, Campsite and Glamping Sector

## Current size of the UK market

The headline statistics from the 'Pitching The Value' report were as follows:

- Holiday parks and campsites generate £9.3bn in visitor expenditure equating to £5.3bn Gross Value Added (GVA) to the UK economy – **glamping accommodation in particular generated £37.5 million of visitor expenditure equating to £22 mn GVA to the UK economy.**
- The sector's GVA accounts for 8% of the tourism sector's overall GVA of £64.7bn
- The holiday park and campsite sector supports 171,448 FTE jobs in the UK
- Visitors and their party who stayed in rented or touring accommodation spent, on average, £557 per visit per group (£101 per day), spending, on average, 4.5 days on a holiday park on each holiday
- Visitors and their party staying in owned accommodation spent, on average, £480 per visit per group (£89 per day) and stayed, on average 5.4 days. This is higher than the average daily spend by visitors to the UK at £63 and 3.1 days per holiday.
- Holiday parks and campsites around the UK generate £9.3bn in visitor expenditure and support 171,448 full-time employees

The report highlights that in the summer of 2018 there were 6,243 member holiday parks operating in the UK, accounting for 438,076 pitches. Those sites offer holidaymakers a diverse range of accommodation such as touring pitches for tents, caravans and motorhomes, rented holiday homes, lodges, and chalets, plus glamping units like tipis and yurts, together with a wide selection of on-site facilities. Park occupancy rates vary from an average of 70% in high season (August) to 55% in mid-season (May and September).

|                  | No. of parks | Touring pitches | Caravan Holiday Home Owned | Caravan Holiday Home Rented | Glamping     | Lodge/ chalet/ cottage Owned | Lodge / chalet / cottage Rented | Total pitches  |
|------------------|--------------|-----------------|----------------------------|-----------------------------|--------------|------------------------------|---------------------------------|----------------|
| England          | 4,845        | 120,363         | 138,966                    | 40,340                      | <b>1,354</b> | 11,765                       | 7,217                           | 320,005        |
| Wales            | 898          | 15,943          | 37,488                     | 6,055                       | <b>81</b>    | 2,621                        | 398                             | 62,586         |
| Scotland         | 390          | 13,048          | 16,287                     | 3,280                       | <b>250</b>   | 1,058                        | 739                             | 34,662         |
| Northern Ireland | 110          | 2,567           | 15,303                     | 2,854                       | <b>0</b>     | 49                           | 49                              | 20,823         |
| <b>Total</b>     | <b>6,243</b> | <b>151,921</b>  | <b>208,044</b>             | <b>52,529</b>               | <b>1,685</b> | <b>15,493</b>                | <b>8,403</b>                    | <b>438,076</b> |

Source: UKCCA, 2018

Source: Pitching The Value report published 2019

# The UK Holiday Park, Campsite and Glamping Sector

## England's holiday park and campsite sector

In England holiday parks and campsites:

- Generated £6.81bn in visitor expenditure, equivalent to £3.88bn GVA
- Supported 126,089 jobs
- Accounted 5% of the tourism sector's GVA
- Visitors stayed up to 73% longer the national tourism average

In the summer of 2018 there were 4,845 member holiday parks operating in England, accounting for 320,005 pitches. Park occupancy rates vary from an average of 70% in high season (August) to 55% in mid-season (September). The proportion of visitors who live outside England was 17%, with 6% coming from Scotland, 5% from Wales, 2% from Northern Ireland, and 4% from outside the UK.

UK holiday park and campsite operators also support local communities through capital and operating expenditure, and wages. Nearly half of those companies and organisations that took part in the report cumulatively spend nearly £303 million per year in this way. The research also found they engage with local communities through support for events such as fundraising activities, participate in recycling and environmental initiatives and promote healthy active lifestyles in the great outdoors through pastimes such as walking and cycling.

Bob Hill, who led the UKCCA joint working group, said: "This is a ground breaking report that clearly demonstrates the important benefits to the economy brought by the UK's many holiday parks and campsites. Pitching the Value will help the industry attract more investment and ultimately improve opportunities for it to grow, develop and create new jobs. Our findings reinforce the importance of holiday parks and campsites to the country's tourism economy. That will help us to improve holidaymakers' on-site experiences and choice, which in turn will also attract more overseas visitors to these shores." Bob added: "We want to use this compelling evidence to ensure key influencers and decision-makers support the development and growth of our industry at a national, regional and individual business level for the benefit of our economy and for holidaymakers themselves."

# The UK Holiday Park, Campsite and Glamping Sector

## Key industry statistics – caravanning/camping volume and value

The tables on the two pages to follow show firstly the total number of England overnight trips, nights and spend taken by UK residents and secondly the same measures where camping and touring caravan were the main forms of accommodation used (shown on page overleaf). In addition, from 2015 onwards, the GBTS data has provided a separate breakdown for glamping/alternative accommodation e.g. Yurt, Tipi, ecopod which would have been included in the camping data prior to 2015. The figures are taken from the Great Britain Tourism Survey (GBTS, formerly the UKTS) from 2010-2019, the national tourism survey (2019 is the last full calendar year for which statistics are available).

The continuing concerns over the economy and the particularly bad summer weather in three consecutive years from 2010 to 2012, with 2012 in particular experiencing the wettest summer for 100 years will have had a marked impact on the caravanning/camping market during this time on an industry heavily reliant on good weather impacting on forward bookings. The London 2012 Olympics, whilst increasing national pride, may have also impacted detrimentally on UK holiday taking as people either stayed at home to watch the events or avoided travelling near to those areas hosting Olympic events. 2012 as a whole was an unusual year for tourism, with the Jubilee and Olympics impacting behaviour, which can make it difficult to compare results for 2013 against 2012.

From 2013 to 2015 England's caravanning and camping market maintained its market share at 7%, 9% and 5% in terms of trips, night and spend respectively and, in contrast to trips, nights and spend for all tourism in England during 2016 which all decreased compared with 2015, the caravanning and camping market increased its market share of trips and nights (8% and 10% respectively) and maintained its market share in terms of spend (5%). Whilst the market share of trips and nights for caravanning and camping in England decreased again between 2017 and 2018, the sector maintained its market share of all England spend at 5%. In 2019, the caravanning and camping market accounted for 6.09 million overnight trips in England, totalling 24.94 million nights away from home, with expenditure of £963 million.

Between 2015 and 2019 overnight domestic trips in England where glamping / alternative accommodation market e.g. Yurts, Tipi etc. was the main accommodation used have increased by 200% in terms of trips (0.48 million 2019), 137% in terms of nights (1.42 million) and 156% in terms of spend (£100 million 2019).

# The UK Holiday Park, Campsite and Glamping Sector

| Year                         | England Trips (millions) |                     | England Nights (millions) |                     | England Spend (millions) |                     |
|------------------------------|--------------------------|---------------------|---------------------------|---------------------|--------------------------|---------------------|
|                              | All trips                | Year on year change | All nights                | Year on year change | All spend                | Year on year change |
| 2010                         | 95.5                     |                     | 284.99                    |                     | £15,842                  |                     |
| 2011                         | 104.28                   | 9%                  | 306.81                    | 8%                  | £17,914                  | 13%                 |
| 2012                         | 104.46                   | 0%                  | 310.19                    | 1%                  | £19,497                  | 9%                  |
| 2013                         | 101.76                   | -3%                 | 297.2                     | -4%                 | £18,710                  | -4%                 |
| 2014                         | 92.61                    | -9%                 | 272.86                    | -8%                 | £18,085                  | -3%                 |
| 2015                         | 102.73                   | 11%                 | 299.57                    | 10%                 | £19,571                  | 8%                  |
| 2016                         | 99.34                    | -3%                 | 287.70                    | -4%                 | £18,492                  | -6%                 |
| 2017                         | 100.62                   | 1%                  | 299.41                    | 4%                  | £19,049                  | 3%                  |
| 2018                         | 97.4                     | -3%                 | 295.8                     | -1%                 | £19,347                  | 2%                  |
| <b>2019</b>                  | <b>99.1</b>              | <b>-2%</b>          | <b>290.3</b>              | <b>-2%</b>          | <b>£19,448</b>           | <b>-1%</b>          |
| <b>Change from base year</b> |                          | <b>4%</b>           |                           | <b>2%</b>           |                          | <b>23%</b>          |

# The UK Holiday Park, Campsite and Glamping Sector

| GBTS Survey                                                  | England Trips (millions) |                  |                                                       |       |              | England Nights (millions) |                  |                                                       |       |              | England Spend (millions) |                  |                                                       |        |              |
|--------------------------------------------------------------|--------------------------|------------------|-------------------------------------------------------|-------|--------------|---------------------------|------------------|-------------------------------------------------------|-------|--------------|--------------------------|------------------|-------------------------------------------------------|--------|--------------|
|                                                              | Camping                  | Touring caravan* | Glamping /alternative accomm. e.g. Yurt, Tipi, ecopod | Total | Market share | Camping                   | Touring caravan* | Glamping /alternative accomm. e.g. Yurt, Tipi, ecopod | Total | Market share | Camping                  | Touring caravan* | Glamping /alternative accomm. e.g. Yurt, Tipi, ecopod | Total  | Market share |
| 2010                                                         | 3.74                     | 3.56             | N/A                                                   | 7.30  | 8%           | 12.54                     | 15.78            | N/A                                                   | 28.32 | 10%          | £429                     | £455             | N/A                                                   | £884   | 6%           |
| 2011                                                         | 3.92                     | 3.60             | N/A                                                   | 7.52  | 7%           | 12.70                     | 17.10            | N/A                                                   | 29.80 | 10%          | £514                     | £525             | N/A                                                   | £1,039 | 6%           |
| 2012                                                         | 3.44                     | 3.20             | N/A                                                   | 6.64  | 6%           | 12.10                     | 15.10            | N/A                                                   | 27.20 | 9%           | £442                     | £469             | N/A                                                   | £911   | 5%           |
| 2013                                                         | 3.84                     | 3.60             | N/A                                                   | 7.44  | 7%           | 12.50                     | 15.6             | N/A                                                   | 28.10 | 9%           | £497                     | £490             | N/A                                                   | £987   | 5%           |
| 2014                                                         | 3.08                     | 3.14             | N/A                                                   | 6.22  | 7%           | 10.5                      | 13.3             | N/A                                                   | 23.8  | 9%           | £412                     | £433             | N/A                                                   | £845   | 5%           |
| 2015                                                         | 3.63                     | 3.44             | 0.16                                                  | 7.23  | 7%           | 11.8                      | 15.9             | 0.60                                                  | 28.30 | 9%           | £440                     | £522             | £39                                                   | £1,001 | 5%           |
| 2016                                                         | 3.48                     | 3.69             | 0.33                                                  | 7.50  | 8%           | 11.16                     | 15.85            | 1.20                                                  | 28.21 | 10%          | £388                     | £467             | £99                                                   | £954   | 5%           |
| 2017                                                         | 3.38                     | 3.43             | 0.48                                                  | 7.29  | 7%           | 12.07                     | 15.98            | 1.21                                                  | 29.26 | 10%          | £358                     | £460             | £82                                                   | £900   | 5%           |
| 2018                                                         | 2.53                     | 3.30             | 0.47                                                  | 6.31  | 6%           | 8.57                      | 15.03            | 1.18                                                  | 24.78 | 8%           | £333                     | £500             | £90                                                   | £923   | 5%           |
| 2019                                                         | 2.69                     | 2.93             | 0.48                                                  | 6.09  | 6%           | 9.54                      | 13.98            | 1.42                                                  | 24.94 | 9%           | £389                     | £474             | £100                                                  | £963   | 5%           |
| * Touring caravan includes campervan/motor caravan/motorhome |                          |                  |                                                       |       |              |                           |                  |                                                       |       |              |                          |                  |                                                       |        |              |

# The UK Holiday Park, Campsite and Glamping Sector

## Stand-out Growth in UK Glamping Market (Arizton Feb 2020)

The glamping market in Europe by revenue is expected to grow at over 11 per cent from 2019–2025 according to a report published in February 2020 by Arizton. The UK was the stand-out growth market in Western Europe from 2011 to 2016, growing at an average of 7.3 per cent annually, while the rest of the region grew by 0.4 per cent. “The tourism market is increasingly marked by a trend to discover places, which are more difficult to access or are relatively unknown. Hence, rural-based glamorous camping experiences are expected to gain ground,” says Arizton. “Fuelled by popular culture, travel bloggers and Instagram influencers, rural glamping is becoming organised and formal. Farm stays are witnessing the second wave.” Arizton also explained growth among the baby boomer generation – with more time and money on their hands – and millennial families that have young children. Another primary driver is the growing demand for weekend getaways for stressed-out workers.

## The growth of glamping in the UK (Tre3dom website 2019)

It is no secret people love a countryside retreat. Escaping the hustle and bustle of daily life is the ultimate form of self-care. Embracing fresh air and green landscapes is the stuff of city folk dreams but pitching a tent and truly ‘camping’ has lost its touch. In a world of modern mod cons and cutting-edge technology in the palm of our hands, completely cutting off and going entirely back to basics seems outlandish. Its undeniably nostalgic but, nowadays, utterly optional. Introducing glamping, the modern alternative to escaping to the country. The ever-growing in popularity solution to staycations (going on holiday without going abroad).

A smart blend of ‘glamorous’ and ‘camping’, glamping is just that. Camping but with all the home comforts in a semi-permanent construction. Glamping is the act of leaving all your usual camping equipment at home, driving a few hours on the motorway and rocking up at your destination with just a toothbrush and pyjamas. Glamping redefines the camping holidays of youth. You are no longer roughing it in the great outdoors, but instead protected from the elements, with hot running water, a proper bed and proper cooking supplies. Hot tubs may not be classed as a camping essential, but they are slowly becoming glamping fundamentals. Gone are the caravan camping days of old, now is the time for holidaying in yurts, luxury pods, treehouses, train conversions, and even churches.

Since its addition to the Oxford English Dictionary in 2016, ‘glamping’ is a term that has stormed the UK holiday market. But glamping is not a growing trend. Glamping is a new way of holidaying, and it is here to stay. More and more Britons are looking within the UK for their next getaway and the whole of the UK is benefitting from the mass shunning of holidays abroad. This is where glamping comes in. As people choose to stay closer to home, luxurious offerings are appealing. Getting the special treatment and comfort of a 5\* hotel without the price tag attracts the Britons looking to get away for shorter periods and less money.

# The UK Holiday Park, Campsite and Glamping Sector

When glamping first became popular in the mid 2000s the concept described a well kitted out tent, or maybe even a yurt. Now glamping has become well-established and encompasses the entire experience of luxury in the great outdoors. Glamping is more than being more comfortable in a tent – it's a way of holidaying in exciting and luxurious ways in the countryside. Train carriages, bespoke pods, treehouses, houseboats are just a few examples of the many imaginative and novel accommodations one can 'glamp' in. Staying within the UK does not mean comprising on uniqueness or missing out on seeing something new or unusual. Guests can have the experience of a lifetime without going to the other side of the world.

## **Glamping Business: Why This Is The Perfect Year To Start One? (Inspiredcamping.com 2018)**

The future looks bright for glamping business as tourists choosing to stay closer to home rather than booking a foreign holiday have delivered a boost to luxury camping providers who are feeling the benefits of a bumper summer. However, dig under the surface of the statistics a bit more and facts about this growing industry and the glamping business model start to get really interesting, despite the current world news. Tourism research is beginning to highlight why the numbers wanting to go glamping won't be slowing down any time soon.

The innocent tourist has been having quite a hard time over the past decade. First, there was the financial melt down of the world's economy, rapidly followed by a very large volcanic ash cloud that put booking agents out of business and disappointed tourists out of pocket. Now there's political unrest, terrorist threats, the refugee crisis, turmoil of various countries, the current health crisis and Brexit all leading to a very unstable world and an equally nervous holidaymaker, worried about hostility abroad and losing money on cancelled vacations. At the same time, staycations have been popularised further through the phenomenon that is Airbnb and various in-country advertising campaigns run by Governments around the world. Popular culture, celebrities and royalty have also given glamping the thumbs up, which has resulted in a further boom in bookings in 2019.

More research conducted by the 'Family Break Finder' website who questioned 1400 of their members revealed 50% intended to stay in a local campsite or holiday park next year, while nearly a third specifically said they wanted to try glamping. The survey also revealed that 1 in 3 families expected to see their holiday budget shrink, but as glamping is considered to be a low-cost holiday option amongst those questioned, this will, in fact, strengthen the glamping trend. Indeed, after the research was first announced the FBF commented, "We've noticed a surge of interest in domestic holidays and short breaks." More specifically it noted that 45% of its campers wanted to experience glamping over the following year. This has doubled from the previous 2018 report.

# The UK Holiday Park, Campsite and Glamping Sector

## The 'staycation' effect (The Great British Staycation report published 2019)

Research published by Barclays in May 2019 suggested the British staycation boom would continue in 2019, as holidaymakers rate UK and overseas holidays equally. Holidaying closer to home is back in fashion and the effects are rippling through communities and businesses across the regions.

The research highlighted that 3 in 10 domestic holidaymakers (31%) planned to spend more holiday time in this country in 2019 than in previous years and more than half of those surveyed (52%) who were aged 25 to 34 (millennials) planned to increase their UK-based holiday time. More than half of tourism businesses (55%) reported an increase in domestic tourism since 2017. The research findings come from a poll of 2,006 Brits who take holidays in UK, on behalf of Barclays Corporate Banking. It also surveyed 528 manager-level respondents from hospitality and leisure businesses across the UK.

Called “The Great British Staycation”, the report said holidaymakers cited convenience and affordability as two reasons behind their staycations – as well as “positive recent experiences of domestic holidays that people want to repeat”.

Most hospitality and leisure businesses in every region of the UK have seen rising demand from domestic tourists, with many reporting increased revenue as a result. Favourites such as the Lake District, Scotland and Cornwall remain most popular, but operators in the north east and the Midlands are seeing the biggest rise in demand. Holidaymakers are also booking their breaks earlier, a trend noted by 39% of businesses.

Mike Saul, head of hospitality and leisure at Barclays, said: “There are various reasons for this [growth] but ultimately, it’s fairly simple. The top-quality services provided by our hotels, restaurants, resorts and leisure providers are helping the British public enjoy great experiences without having to travel too far.”

Sally Balcombe, chief executive of VisitBritain and VisitEngland, said: “Barclays’ new research delivers some heartening news about the flourishing health of UK domestic tourism.” She hailed the news about millennials increasing the time they spend on UK breaks, and earlier booking intentions, as they reversed earlier negative trends.

# The UK Holiday Park, Campsite and Glamping Sector

## The 'staycation' effect (The Sykes Staycation Index 2019)

A further report published by Sykes Holiday Cottages in 2019 also confirmed the growing popularity of holidaying at home in the UK and highlighted that:

- 66% of Brits holidayed in the UK during 2018 (up 10% from 2017).
- 50% planned to spend their main summer break in the UK in 2019.
- Three breaks is the average number of trips British staycationers expect to take in the UK in 2019.
- The top 10 most popular regions for bookings in 2018 were; South West England, North Wales, Cumbria, North York Moors & Coast, Yorkshire Dales, Peak District, Heart of England, East Anglia, South Wales and Cotswolds.
- The top 10 fastest-growing regions in 2018 (from 2017) were; Cotswolds, South West England, Cumbria, North Wales, Southern Scotland, Mid Wales, North York Moors & Coast, Peak District, Northumberland and Central Scotland.
- 14% of the nation say glamping is their top holiday choice, rising to 25% of those aged 25-34.

# Wellness Tourism



# The wellness tourism economy

## Introduction

Wellness tourism, also called health tourism, is a type of travel that seeks to improve a person's health and wellbeing. Although it is sometimes conflated with medical tourism, where a person travels in order to see a specific doctor or get a procedure done, wellness tourism typically focuses on holistic methods of improving one's health. That's not to say that wellness tourism doesn't occasionally overlap with medical tourism — some spas offer cosmetic treatments such as Botox injections, for example — but the two terms should not be used interchangeably.

## The growth of wellness tourism

According to the Global Wellness Institute's (GWI) 2018 report, wellness tourism is now growing twice as fast as regular tourism, making it a lucrative new market. In fact, TripAdvisor polled its Facebook community in June of 2018 and found that approximately 25% of its followers were interested in a wellness trip in the next 12 months. The GWI report divides wellness tourists into two categories: primary wellness travellers are those "who are motivated by wellness to take a trip or choose their destination based on its wellness offerings", while secondary wellness travellers "seek to maintain wellness or engage in wellness activities during any kind of travel". Secondary wellness travellers comprise the bulk of wellness tourism spending, making up approximately 86% according to the GWI report.

Besides the fact that wellness tourism is growing at such a rapid rate it is also described by the GWI as "high-yield tourism", meaning that travellers partaking in wellness tourism spend on average much more than the typical tourist. This number isn't inconsequential, either: according to the report, international wellness tourists spend about 53% more and domestic wellness tourists spend a whopping 178% more than the average tourist. What this boils down to is that if there is the opportunity to incorporate wellness into a business, then you should. Not only is it a growing market featuring a high volume of spending, but with two types of wellness travellers, it's even easier to be a part of the trend. A businesses doesn't need to have a complete overhaul to take advantage of it but can just add a few of the wellness offerings that tourists are looking for.

# Tourism in the East Midlands, Derbyshire & High Peak District



# Domestic overnight tourism in the East Midlands

The proposed development at High Peak should not be considered in isolation but in the context of the wider East Midlands and UK tourism products and markets, details of which are included on the pages to follow.

## The East Midlands Tourism Product

According to the Great Britain Tourism Survey (GBTS), GB residents made 7.56 million trips to the East Midlands in 2019, generating a total spend of approximately £1.15 bn.

The region accounted for 6% of all Great Britain domestic trips during the year and 5% of all spend.

| Domestic Visitor Destinations 2019 | Trips (millions) | % of all GB trips | Spend (£ millions) | % of all GB spend |
|------------------------------------|------------------|-------------------|--------------------|-------------------|
| GB Total                           | 122.8            | 100%              | 24,651             | 100%              |
| England Total                      | 99.1             | 81%               | 19,448             | 79%               |
| London                             | 12.16            | 10%               | 3,035              | 12%               |
| <b>East Midlands</b>               | <b>7.56</b>      | <b>6%</b>         | <b>1,153</b>       | <b>5%</b>         |
| East of England                    | 9.72             | 8%                | 1,661              | 7%                |
| West Midlands                      | 8.88             | 7%                | 1,451              | 6%                |
| North West                         | 14.07            | 11%               | 2,940              | 12%               |
| North East                         | 4.25             | 3%                | 800                | 3%                |
| South East                         | 15.83            | 13%               | 2,555              | 10%               |
| South West                         | 18.94            | 15%               | 4,133              | 17%               |
| Yorks & Humberside                 | 9.55             | 8%                | 1,690              | 7%                |

# Domestic overnight tourism in the East Midlands trends

The table below shows the total number of East Midlands overnight trips, nights and spend taken by UK residents. The figures are taken from GBTS, the national tourism survey, for the period 2010-2019 (2019 is the last full calendar year for which self catering statistics for the East Midlands are available).

Tourism in the East Midlands has demonstrated mixed performance over the last decade. Trips, nights and spend all peaked in 2011. 2017 and 2018 saw year on year increases in trips during both years before decreasing slightly during 2019.

Compared with the base year of 2010, 2019 trips and nights to the region decreased by -2% and -1% respectively whilst spend increased by 12%.

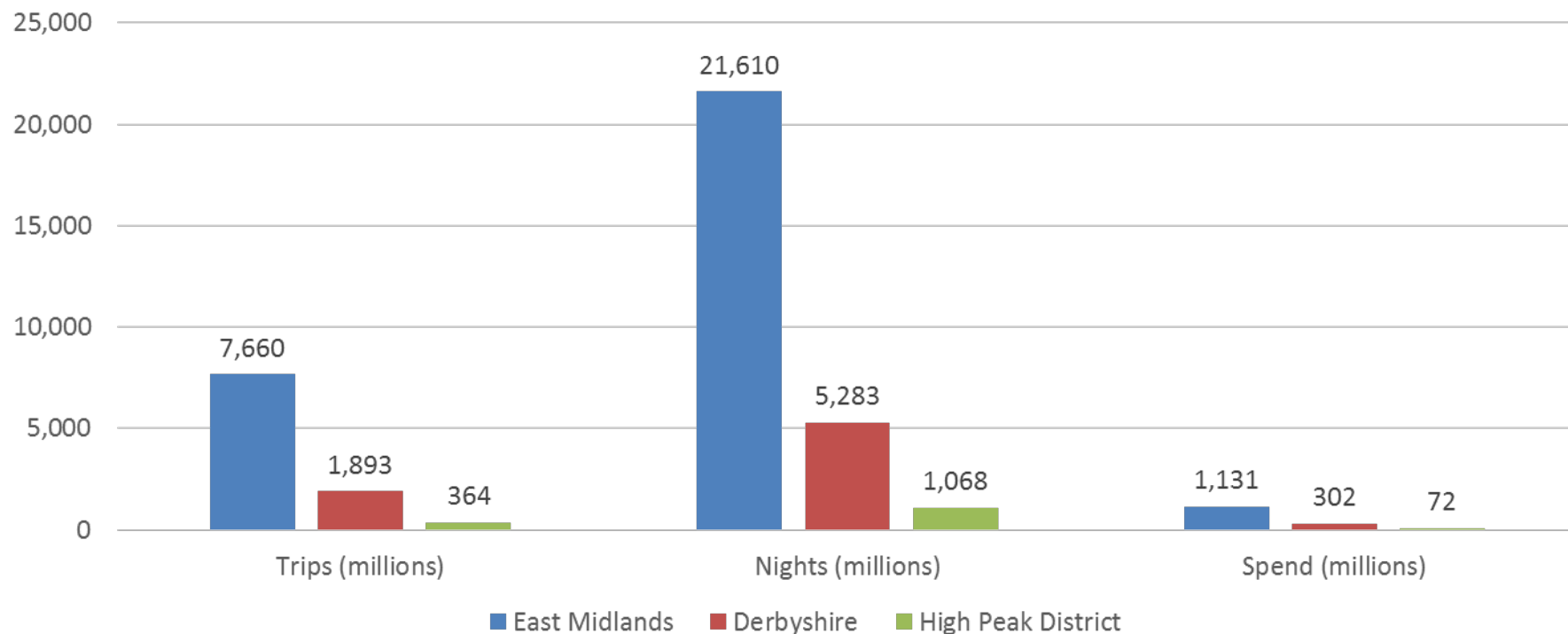
| Year                         | East Midlands Trips (millions) |                     | East Midlands Nights (millions) |                     | East Midlands Spend (millions) |                     |
|------------------------------|--------------------------------|---------------------|---------------------------------|---------------------|--------------------------------|---------------------|
|                              | All trips                      | Year on year change | All nights                      | Year on year change | All spend                      | Year on year change |
| 2010                         | 7.69                           |                     | 21.60                           |                     | 1029.00                        |                     |
| 2011                         | 9.00                           | 17%                 | 24.80                           | 15%                 | 1317.00                        | 28%                 |
| 2012                         | 8.50                           | -6%                 | 23.70                           | -4%                 | 1339.00                        | 2%                  |
| 2013                         | 7.90                           | -7%                 | 20.90                           | -12%                | 1103.00                        | -18%                |
| 2014                         | 7.14                           | -10%                | 19.94                           | -5%                 | 1107.00                        | 0%                  |
| 2015                         | 8.02                           | 12%                 | 21.76                           | 9%                  | 1146.00                        | 4%                  |
| 2016                         | 7.28                           | -9%                 | 19.74                           | -9%                 | 1087.00                        | -5%                 |
| 2017                         | 7.68                           | 5%                  | 21.71                           | 10%                 | 1049.00                        | -3%                 |
| 2018                         | 7.75                           | 1%                  | 21.64                           | 0%                  | 1192.00                        | 14%                 |
| <b>2019</b>                  | <b>7.56</b>                    | <b>-2%</b>          | <b>21.48</b>                    | <b>-1%</b>          | <b>1153.00</b>                 | <b>-3%</b>          |
| <b>Change from base year</b> |                                | <b>-2%</b>          |                                 | <b>-1%</b>          |                                | <b>12%</b>          |

# Overnight tourism trips in Derbyshire & High Peak District

Three year average data (2017-2019) from GBTS estimated that approximately 1.9 million overnight trips were made to the county of Derbyshire, generating 5.3 million visitor nights and £302 million in visitor spend on average per year for that period. Trips to Derbyshire account for 25% of all trips to the East Midlands region, 24% of nights and 27% of all spend to the region.

Within the county, High Peak District (where the proposed development at High Peak Retreat is located), attracted approximately 364,000 overnight staying visits, equating to approximately 1.1 million visitor nights and generating an estimated £72 million in visitor spend on average per year. Trips to the district account for 19% of all trips to Derbyshire and 5% of all trips to the East Midlands region. In terms of visitor nights the district accounts for 20% of all visitor nights to Derbyshire and 5% of all nights to the East Midlands region whilst spend in the district accounts for 24% and 6% of all spend to Derbyshire and the East Midlands region respectively.

East Midlands, Derbyshire and High Peak District All Staying Trips, Nights and Spend (millions)  
(Three year average data 2017,2018 & 2019)



# The local vicinity

The proposal is for the creation of a small scale holiday retreat which provides not only high quality glamping style accommodation and a small number of motor caravan pitches but also on-site facilities with the intention of providing visitors with the opportunity for low key, quiet recreational activities such as walking, cycling, fishing, bird watching, pony trekking / horse riding, wildlife walks and nature conservation /wildlife habitat area to create wildlife corridors and increase bio-diversity on the site as well as on-site activities such as Yoga and fitness classes providing plenty to keep visitors occupied and to provide a first class visitor experience

However, it is well evidenced that staying visitors also like to explore the local area, facilities and attractions during a visit and High Peak Retreat is ideally placed to cover a number of options for visitors. The site is located within the Peak District National Park which attracts 12.25 million visits a year. It is in a location such as this, in addition to the local vicinity of the site, that visitor spend will spread out of High Peak Retreat to benefit local businesses. The sites location gives easy access to the A6 which lies approximately 1.2 miles to the East of the application site enabling easy access to the site and also offering visitors the chance to travel further afield if they wish. The proposed collection service from the nearby Chapel-en-le-Frith railway station which would be offered to holidaymakers visiting High Peak Retreat by train would also help to reduce car journeys and to encourage use of public transport. Bicycle hire and charging points for electric cars would also be offered on site to further encourage the use of sustainable modes of transport.

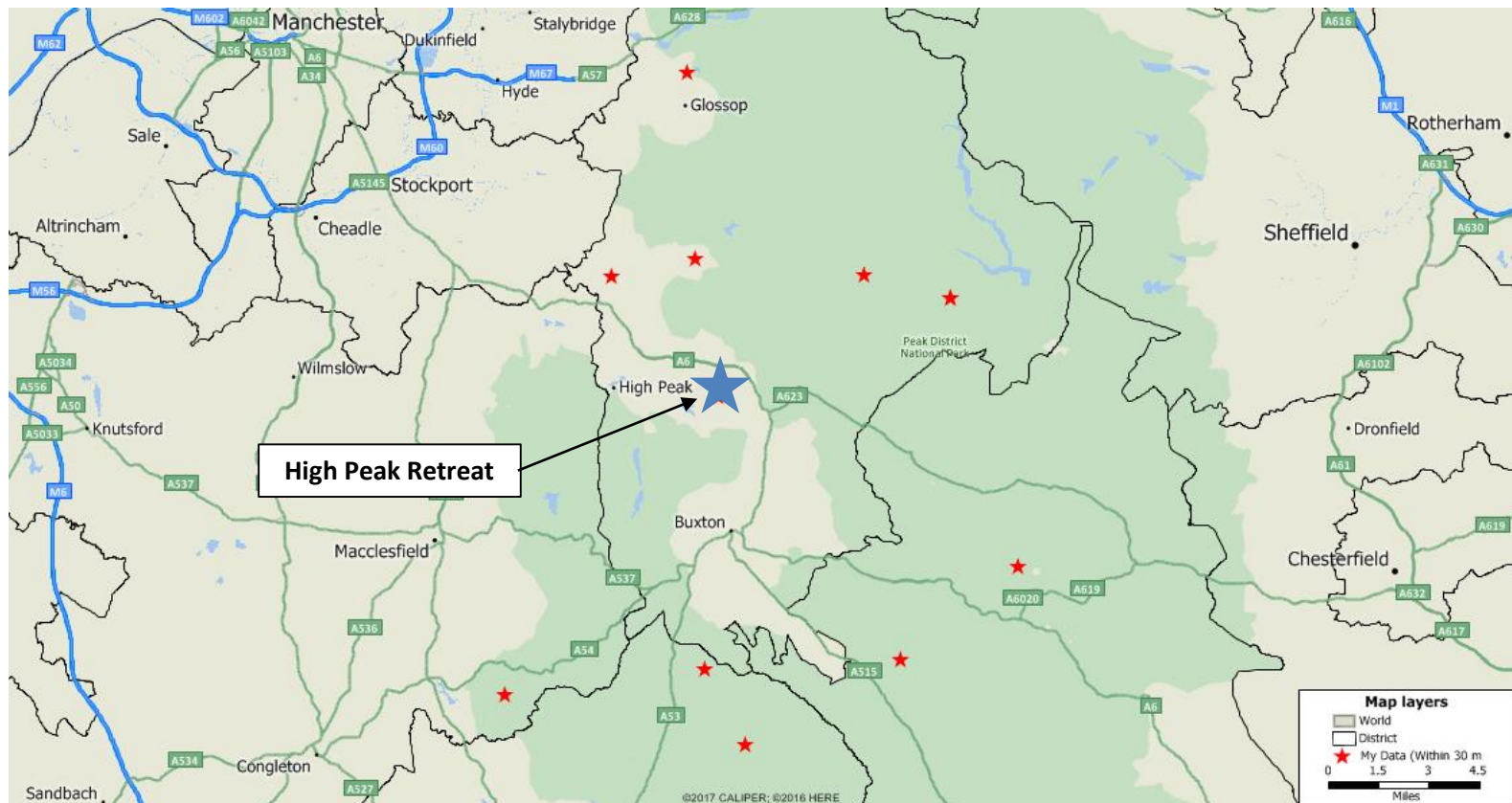
The appeal of the focus on nature generally at the site should also be considered. 12.25 million visits are made to the Peak District National Park each year and a visitor survey carried out in 2015 showed that half of all visitors stated that their main activity in the park was walking between 2-10 miles. Tranquillity/quiet enjoyment of the English countryside was recognised by the majority of people taking part in the survey as one of the most important qualities and makes a significant contribution to the enjoyment of the area. It is important for our mental and physical well-being and improves our quality of life. Figures such as these clearly demonstrate the wide appeal of such a development, it is by no means a niche market being targeted and, as such, the accommodation at the site is likely to appeal to a similar demographic to the one that is already visiting Derbyshire and the Peak District National Park. Data from the National Parks visitor surveys reported that; 68% of visitors to national parks are families, most coming in a group with under five people. Only 7% of visitors come from outside the UK. Most visitors come from the densely populated South-East region, near London or from the regions closest to national parks. 58% of visitors come to enjoy the scenery and landscape, which makes this the main reason for visiting a national park.

All of the evidence suggests that the focus, facilities and activities at the site coupled with its natural setting and location will make High Peak Retreat of interest to large proportions of current visitors to Derbyshire and the Peak District National Park and potential new visitors to the county, who are likely to be of a similar demographic.

# The existing accommodation offering

Having undertaken searches online for similar 'glamping pod' accommodation in High Peak District and the wider Derbyshire/Peak District area there appear to be a number of other sites offering similar accommodation but only eleven situated within a thirty minutes' drive time of the proposed new development at High Peak Retreat equating to a total of only 30 glamping units/pods combined. The map below shows the location of High Peak Retreat and these other eleven sites which, as can be seen, covers a considerable catchment area which will receive thousands of staying visitors each year.

All the evidence within this report clearly demonstrates that the glamping sector is a big growth market and the current supply of this type of accommodation in the local area is extremely unlikely to be enough to meet consumer demand. As such, the new site at High Peak Retreat will not be displacing existing customers. Indeed, the lack of other operators offering this scale and type of high quality, glamping pod accommodation and motor caravan pitches suggests that the local tourism product, particularly in High Peak District, will be enhanced through this development and have the potential to attract new visitors to the area as well.



# Covid-19 Impact

As the battle against Coronavirus in the UK continues, looking back at the start of 2020 no one could have predicated what an unprecedented year it was to turn out to be and, as we move through the beginning of 2021, the future for the tourism and hospitality sector is likely to remain uncertain for many more months to come.

## Visit England Domestic Covid-19 Consumer Sentiment Tracker

Visit England commissioned a tracking survey to understand domestic intent to take short breaks and holidays both within the U.K. and abroad, with particular focus around the current barriers and concerns around travel and how these will evolve over time. The survey addresses the likelihood of UK residents to travel, when and where they plan to go, specific trip details such as accommodation type and activities undertaken and the type of reassurances they're seeking from the sector.

## Key results from Wave 24 of the survey (covering the period 25-29<sup>th</sup> January 2021 are as follows:

- 18% of UK adults anticipate life will return to something 'close to normal' by June this year. Just over 2 in 5 (42%) people expect normality to return between July-September and nearly 6 in 10 (56%) by the end of the year.
- Nearly a third of UK adults say they intend to take more or about the same number of UK short breaks (32%) and longer breaks (31%) compared to normal between now and the end of June. Nearly half anticipate taking fewer of both types of trips, whilst around 1 in 5 are unsure.
- Around 1 in 4 (23%) of UK adults plan on taking more or about the same number of overseas *short* breaks and *longer* breaks compared to normal between now and the end of June. However, just over half of UK adults (53%) anticipate taking fewer of both types of trips.
- A minority of UK adults are confident a booked overnight domestic trip would go ahead as planned this winter (between January and March). Confidence begins to rise for trips in Spring and Summer, although it isn't until October onwards that a majority (63%) claim to be either fairly or very confident.
- 'Restrictions on travel from government' remains the primary reason people do not feel confident about taking an overnight trip during either the Winter or forthcoming Spring periods.
- 12% claim to have already planned and 8% already booked their next domestic overnight trip. 12% also say they intend to plan and 9% intend to book their next trip sometime this winter (between January and March).
- Just 4% of UK adults plan on taking an overnight trip in the UK by the end of March. 14% anticipate taking a trip during the spring period (April to June), 27% during this summer and 20% from October onwards. 32% are not intending to take any domestic overnight trips at all.

# Covid-19 Impact

**Key results from Wave 24 of the survey (covering the period 25-29<sup>th</sup> January 2021 are as follows (continued):**

- Half of UK Winter Intenders (50%) claim to have already planned their overnight trip with nearly 3 in 10 (29%) saying they have booked it.
- Overall, longer breaks of 4+ nights make up the majority of intended trips across the winter, spring and summer periods.
- The South West is the lead destination for an overnight stay in both the winter and spring periods (with 20% and 24% shares respectively).
- The East Midlands is ranked fifth for winter trips and tenth for trips during the spring (with 11% and 4% shares respectively).

# Covid-19 Impact

## Visit Britain Inbound Covid-19 Sentiment Tracker

In partnership with Visit Wales, VisitScotland and London & Partners, Visit Britain commissioned research to understand international consumer sentiment towards international travel during the COVID-19 pandemic. Wave 1 of the tracker was fielded between 2-16 December 2020 in 14 markets including Australia, Canada, China, France, Germany, India, the Irish Republic, Italy, Netherlands, Norway, Saudi Arabia, Spain, Sweden and the USA. Key findings are as follows:

- Overall, 70% of respondents would consider an international leisure trip in 2021, showing a resilient desire to travel despite pandemic uncertainties.
- Around 1 in 6 (16%) say they are better off vs only 7% worse off, when asked about spending power for the next 12 months vs the previous year, but 40% feel uncertain about the impact of COVID on their finances. However, for those who were uncertain or have been impacted negatively, there is still a high proportion who would consider travel in 2021, indicating that the financial situation is not hugely detrimental to travel intentions.
- Overall, about 4 in 10 (38%) have a clear plan in mind about where they want to go, but only 7% have already booked, making the destination choice still open for 2021. The majority of leisure intenders having Britain destinations in mind were in the early stage of their planning.
- 63% said they would leave bookings to the last minute. 74% of respondents also say they would look for less crowded places even if they miss out on iconic attractions, although we know from other data in the report that it is more about the concern of crowding rather than not wanting to visit an iconic attraction.
- Europe is considered by 59% of leisure trip intenders as their next international destination, making it the most popular global region.
- 86% of those considering a trip to Britain would travel to England.
- Within England, the most popular destination for leisure trip intenders is London (46%), followed by the South East (38%) and North West (31%).
- Level of interest in activities while on holiday suggest a desire among some to return to many pre-pandemic activities when travelling. Dining out was the most popular activity (44%), followed closely by visiting famous/iconic tourist attractions (43%) and outdoor nature activities (43%).

# **Domestic tourism forecast for the UK in 2020 and 2021**

VisitBritain have run a domestic tourism forecast. As with their inbound forecast this represents a snapshot in time and makes a number of assumptions to provide an estimate of impact. Subsequent developments could change the outlook. The forecast models each of the four journey purposes for overnight tourism (holidays, business, visiting friends and relatives and miscellaneous journeys) and 17 categories of spending for leisure day trips, separately.

## **2020 forecast**

- Visit Britain have forecast a central scenario for Britain of £34.4 billion in domestic tourism spending in 2020, down 62% compared to 2019 when spending by domestic tourists in Britain was £91.6bn. This comprises £9.9bn from overnight tourism, down from £24.7bn in 2019, and £24.6bn from day trips, down from £67.0bn in 2019. In total this represents a loss of £57.2bn (£14.7bn from overnights and £42.4bn from leisure day trips). The 2020 forecast is for a decline of 60% for overnights and 63% for leisure day trips, although with different pattern of recovery. While some categories of day trips started to recover first, others were still very limited.

## **2021 forecast**

- Visit Britain's forecast is for a recovery to £61.7bn in domestic tourism spending in 2021; this is up 79% compared to 2020 but still only 67% of the level of spending seen in 2019. They are forecasting £18.0bn in domestic overnight tourism spending (82% growth on 2020 but 73% of the 2019 level) and £44.6bn in leisure day trip spending (82% growth on 2020 and 67% of the 2019 level).
- As with our inbound forecast, this is a short-term forecast that describes one possible outcome and involves many assumptions and simplifications due to the fast-moving and uncertain situation; it is therefore subject to revision.
- The forecast assumes a slow recovery in early 2021 before a step change in the spring as restrictions ease and confidence returns, followed by a gradual recovery throughout the rest of the year and beyond. Medical assumptions are as per the inbound forecast. By the end of 2021 Visit Britain do not expect that we will be back to pre-COVID levels of spending in any domestic tourism journey purpose or activity type, although they are forecasting that by the end of the year the value of spending will be back to 84% of 2019 levels.

# **Inbound tourism forecast for the UK in 2020 and 2021**

Official inbound tourism statistics from the Office for National Statistics have only been published up to June 2020 and detailed statistics only up to March 2020. However, a number of other data sources are available to assess the state of inbound tourism to the UK.

## **2020 forecast**

- VisitBritain's latest central scenario forecast for inbound tourism to the UK in 2020 is for a decline of 76% in visits to 9.7 million and a decline of 80% in spending to £5.7 billion. This would represent a loss vs the pre-COVID forecast of 32.3 million visits and £24.7 billion spending.
- From mid-March to mid-July COVID-19 triggered a near-total shutdown in international tourism to/from the UK with a few specific exceptions. Since then available evidence suggests that there was an increase in visitor numbers from this low point although they remained very low and dipped again towards the end of the year.

## **2021 forecast**

- Visit Britain's revised central scenario for inbound tourism in 2021 is for 11.7 million visits, up 21% on 2020 but only 29% of the 2019 level and £6.6 billion to be spent by inbound tourists, up 16% on 2020 but only 23% of the 2019 level.
- Visit Britain expect inbound tourism to remain at a very low level the early months of the year. The forecast assumes the start of a recovery from May from some European markets, albeit slow at first and with inbound tourism remaining at a fraction of its usual level followed by a gradual recovery in the summer and autumn. However, this is contingent on the progression of vaccine rollouts and in the level of COVID cases in both the UK and key inbound markets enabling international travel to re-open. By the end of 2021 Visit Britain do not expect inbound tourism to be back to, or even close to, normal levels.
- In general, European inbound markets are forecast to recover quicker than long haul markets. However, there will be variations within each of Europe and long haul. There are forecast to be 9.3 million visits from Europe in 2021, 34% of the 2019 level and 2.5 million visits from long haul markets, 18% of the 2019 level. The value of visitor spending in 2021 is forecast to be £3.5 billion and £3.1 billion from European and long haul visitors respectively.
- There are a number of assumptions behind, and significant risks to, this forecast. The most crucial drivers will be the progression of COVID-19 and any new variants and of vaccinations, both in the UK and in our key inbound markets. It is assumed that in the UK and most advanced markets, the majority of the adult population will be vaccinated in 2021 and that by the end of the year COVID-19 will be endemic and controlled rather than pandemic.

# Inbound tourism forecast for the UK in 2020 and 2021

## 2021 forecast continued

- The market composition effect (Europe recovering faster than long haul) is likely to push down average spend per visit but it is assumed that the net effect of other factors (such as changes in average length of stay and average spend per night) is neutral. forecast does not specifically model journey purpose but assumes that visits to friends and relatives are likely to recover faster than average; business trips (excluding those delivering goods) are likely to recover slower than average; and holiday visits are likely to recover at a rate in between.
- A number of other factors are likely to prevent inbound tourism recovery to pre-COVID levels even beyond 2021. These include the economic situation in each market with demand hit by unemployment and possible fiscal tightening, new behavioural habits affecting leisure and business travel, both short and long term and potential loss of supply.
- Forecasting at this time is difficult given the fast-moving situation and the unique circumstances. Events are moving fast during the COVID-19 pandemic and the outlook can change daily. Visit Britain stress that this central scenario is merely one possible outturn and involves several assumptions and simplifications due to the fast-moving and uncertain situation. VisitBritain's central scenario forecasts therefore reflect a snapshot in time based on current understanding and a set of assumptions. Subsequent developments could change the outlook and they will revise this forecast a number of times during 2021

# Future Trends

It is also helpful to consider a number of other contextual factors as follows:

## **Globalisation**

Global access to international media, food and brands has driven cultural and commercial change. Consumer choice has exploded as the world has become one huge bazaar where anything can be marketed, bought or sold online without borders or limits. Inspiration and trendsetters are international and inspire travel to the source of foreign cultural influences and products. In this global context national protectionism has gained political traction and some western countries perceive a crisis of identity in a homogenous western society – but identifying distinctive qualities and experiences tied to a destination make it stand out in the milieu.

## **Connectivity**

Connectivity is a significant factor in the process of consumers deciding where to take a holiday. According to The Office for National Statistics out of the top 10 countries with the most inbound passengers into the UK in 2015, 8 were European. Geographical proximity is the main factor for the number of European visitors to the UK and connectivity is key when considering inbound visitors from long-haul destinations. The UK has more than twice as much seat capacity on direct flights from the US than any other long haul market – and the US is also the UK's second biggest tourism market in numbers of inbound passengers, second only to France.

Also within the country itself infrastructure will remain a key criterion for the success of English tourism. Connectivity between international locations and various destinations within England has improved significantly over the past decade but transportation within the country can be a barrier for international audiences. A lack of knowledge of UK geography and transport networks combined with reservations about driving on the “wrong” side of the road can combine to discourage travel making it important to ensure that visitors know how best to access product/destinations outside the capital.

# Future Trends

## Precarious Living

A zeitgeist of uncertainty and precariousness hangs in the air. 2016 was a year in which populism became popular and electorates developed a taste for anti-establishment and isolated protectionism. It would be wrong to assume that politics will simply snap back to normal, with the very real threat posed by anti-establishment parties in the heart of the EU. A Eurobarometer study showed that while Europeans, in 2016, still considered unemployment the top issue facing Europe, concerns about immigration and terrorism had been growing significantly compared to when the same question had been asked back in previous years. In 2012, 2% of Europeans believed terrorism was the most important issue facing Europe – in 2016 this was 16%. Furthermore, only 3 in 10 global consumers claim to have confidence in the state to provide financial support when at retirement age\*. Societal norms and expectations have been relegated to yesteryear and the fate of individuals in this global narrative is perceived to hang by a thread.

## Demographics

### The Ageless Traveller

The face of the global consumer landscape is rapidly evolving as developed markets become aging societies. This is changing consumer behaviour, causing individuals to delay major milestones until later in life, or to repeat them and to live in more mixed generation or solo households. As people are living longer and more active lives, while adhering less and less to a traditional order of key life stages, it is becoming less relevant to think about travellers in terms of their age and more in terms of their interests.

### The Solo Traveller

It used to be the case that in most consumers' lives periods of solo living were concentrated in young adulthood and later life. However, today, as life stages become more flexible and traditional milestones like marriage get shuffled, postponed and even repeated, consumers are experiencing living on one's own across any number of points in their life – bringing with them all the related consequences of single living into their leisure activities. Travelling solo is one of the fastest growing categories, and travel brands can open up a lot of potential by tapping into this commercial niche. A proliferation of offers, services and networks will make travelling by oneself even easier and more enjoyable. Solo adventures are firmly positioned as enriching opportunities for self-discovery, which ties in with some of the consumer trends we are discussing later on this report (e.g. The Leisure Upgrade).

# Estimated business levels at High Peak Retreat



# High Peak Retreat- Estimated business levels

To estimate the likely impact that the proposed development will have on the local economy the following data sources, calculations and assumptions have been used;

- **Site capacity** – 20 units/pitches giving a total capacity of 4,760 unit/pitch nights available per annum for a 34 week season (20\*238).
- **Unit occupancy** – The Pitching the Value report estimates that in 2019 non-serviced unit occupancy was 55% for the season. Applying this to the unit/pitch nights available gives the totals of units/pitches occupied as 2,632 for a 34 week season.
- **Average group size** – The Pitching the Value report calculated an average group size of 2.85 people.
- **Length of stay** – Average length of stay is estimated at 4.26 nights, derived from East Midlands GBTS data for 2019.
- **Average spend per person per night** – Derived from the same source as above, average spend per person is estimated at £45.63 per person per night for those staying in self-catering accommodation (including caravan and camping).

The figures calculated through the above sources have then been fed into the Cambridge Model to produce the following economic outputs for the proposed development. The model is a nationally recognised method for estimating the impacts of tourism in a local area.

# High Peak Retreat- Estimated economic impact

The economic impacts estimated to be associated with the likely levels of visitors to High Peak Retreat are shown below for a 34 week season.

The proposed development will provide an estimated £390,000 of business turnover into the local economy supporting approximately 14 actual jobs, 9 of which will be the new jobs at High Peak Retreat. Sectors outside of the development will all benefit from the spend of visitors staying at the site with employment supported in retailing and catering through the direct visitor spend. Approximately 91% of jobs are supported by direct visitor spend and 9% through supplier and induced spend.

| High Peak Retreat Economic Impact        | 34 week season  | %           |
|------------------------------------------|-----------------|-------------|
| <b>Visitor nights</b>                    | <b>7,500</b>    | -           |
| Accommodation spend                      | £82,000         | 26%         |
| Retail spend                             | £72,000         | 23%         |
| Food and drink spend                     | £91,000         | 28%         |
| Attraction/entertainment spend           | £42,000         | 13%         |
| Travel and transport spend               | £33,000         | 10%         |
| <b>Total visitor spend</b>               | <b>£320,000</b> | <b>100%</b> |
| Supplier and induced spend               | £70,000         | -           |
| <b>Total business turnover supported</b> | <b>£390,000</b> | -           |
| Estimated FTE employment supported       | <b>10</b>       | -           |
| Estimated actual employment supported    | 14              | -           |

Adjustments have been made to recognise that some spending on retail and food and drink will fall within attractions or accommodation establishments and it is assumed that 40% of travel spend will take place at the origin of the trip rather than at the destination.

Business turnover arises as a result of tourist spending, from the purchase of supplies and services locally by businesses in receipt of visitor spending (supplier spend) and as a result of the spending of wages in businesses by employees whose jobs are directly or indirectly supported by tourism spending (induced spend).

# Good Practice



# Good practice

## Alignment with recognised good practices and policy

The proposed development should explore a number of avenues to ensure that the visitor experience provided is of the highest quality:

- Participation in a quality assurance scheme to ensure that national standards are met
- Participation in a green tourism scheme. This will ensure that sustainable practices are embedded into all business plans
- Staff training – Customer service is at the forefront of the visitor experience and both management and employees should engage with Welcome To Excellence Courses, endorsed by Visit England, to ensure that they excel in this area

The proposed development should also ensure that it is aware of the policies relevant to this proposed development detailed in any Local Plan and ensure that business plans align with the relevant tourism policy within this document.

Tourism is an increasingly competitive market and businesses need to be ahead of the field to succeed and ensure good levels of repeat business are achieved which will ultimately lead to success. The current economic climate has meant that today's potential visitor is seeking value for money more than ever. This is not to say that businesses need to cut their prices, but they do need to be competitive and ensure that the customer feels they are getting value for their money.

Visitors are still willing to pay for a quality product, but wherever possible businesses should try to do that little extra and give a perception of added value. This need not be a large additional expense but attention to detail and feeling of welcome is essential in achieving this.

Customer satisfaction should also be embedded into all business plans. Monitoring satisfaction and acting upon feedback will ensure that quality standards are not only maintained but continuously improved over time to meet the changing demands of visitors.

# About Us



# The South West Research Company Ltd.

## About Us

The South West Research Company Ltd. has a wealth of research experience with tourism related projects being their field of expertise. Indeed, between them the business partners Paul Haydon and Diane Goffey have gathered over thirty years research experience in the tourism industry and have an in-depth knowledge of national, regional and local tourism data, statistics and trends and have undertaken many feasibility studies such as this report for the proposed development at High Peak Retreat.

The South West Research Company strives to provide not only a first class customer service, but a user friendly research product that can be fully utilised by our clients.

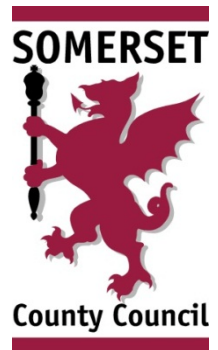
### **The business partners are: -**

**Paul Haydon:** Paul has worked on a variety of projects since entering into tourism research in 2001. These cover a wide range of quantitative tourism based research projects, economic studies (including Cambridge Model) and geo-demographic profiling projects. Paul has an in depth knowledge of fieldwork management and has managed in excess of 100,000 face to face interviews across the South West region over the last 8 years.

**Diane Goffey:** Diane holds a 2:1 degree in Tourism Studies from Bournemouth University and is an Associate Member of the Market Research Society (MRS). She has over 12 years experience of working on tourism related research projects within the regional tourist board arena, as well as research agency experience. During that time she has project managed a wide variety of quantitative based tourism research projects across the South West region.

# The South West Research Company Ltd.

At a glance - current and recent clients include:



# The South West Research Company Ltd.

## Contact details

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