

## Pleasley Visitor Hub: Position Paper



### Stage 1

## Audit and Assessment of the Pleasley Visitor Hub

Prepared by

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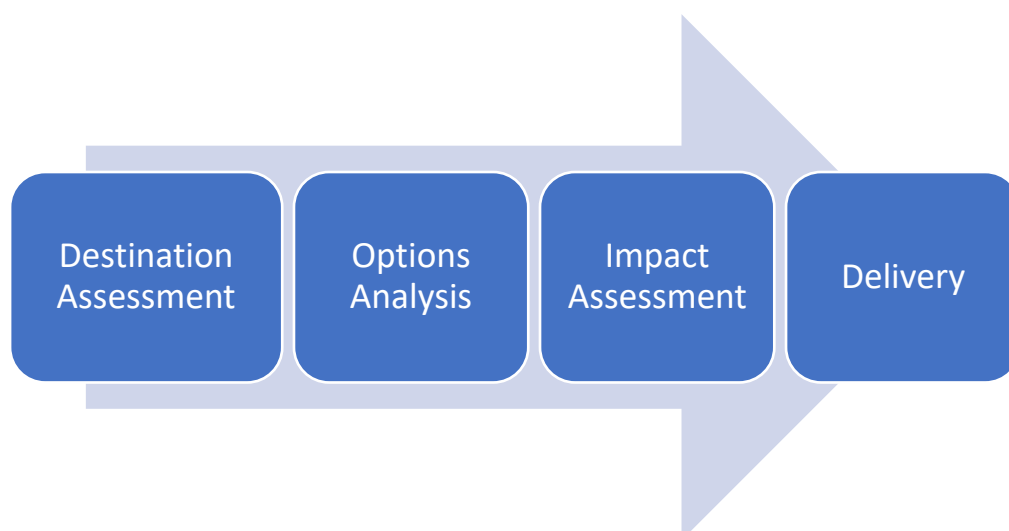
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## 1. Introduction

Visit. Sleep. Cycle. Repeat (VSCR) is a visitor economy programme developed and led by partners in North Derbyshire and North Nottinghamshire (Visitor Economy Consortium-VEC). The framework for action to develop the visitor economy is set out in the Destination Plan<sup>1</sup>. The Plan is about realising the tourism potential of the Visit. Sleep. Cycle. Repeat geography, using what is special about the area - the outstanding heritage and the opportunities for leisure cycling – to create a stronger destination that stands out from the competition. The objective is to grow overnight stays, encourage visitors to explore further on a bike and to support the growth of tourism and cycling-related businesses. The Plan sets out the potential and what needs to be done over the next five years but looks beyond to 2027.

A key component of the Destination Plan is the development of cycling-led hubs to make cycling opportunities more visible to visitors, create a stronger visitor destination and enable and encourage visitor to go cycling.

The Pleasley Visitor Hub was identified within the Destination Plan as one of the three hubs, where growth should be targeted. **Planning Solutions Consulting (PSC) was appointed by the VEC to test and develop the proposition of developing the area as sustainable tourism hub.** The focus of our approach is to identify and present a better understanding of priorities, projects and programmes necessary to form a Visitor Hub and grow the visitor economy in the area. The main work stages are summarised below.



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<sup>1</sup> Destination Plan: Blue Sail in partnership with Hotel Solution (January 2018)

This Stage One report, the **Pleasley Visitor Hub Position Paper**, provides an analysis and critical assessment of current tourism assets and opportunities for developing the area as a short-stay, sustainable destination, specifically in terms of:

- Tourism context
- The strengths and opportunities of the local tourism product and Visitor Hub proposition
- Product gaps
- Destination ‘fit’ to core market segments: Fun Families, Active Adults, Event Cycling and
- Spatial and capacity opportunities

Since the start of the audit and assessment phase, and along with all other discretionary areas of the economy, the UK travel and tourism industry are now facing an unprecedented crisis due to the impact of COVID-19, which has seen the visitor economy abruptly shut down. These are challenging times for many businesses, with the ‘lockdown’ putting a stop to all international and domestic visitors, both ‘stay’ and ‘day’. It is early days, but more and more attention is being given to how best to engineer a recovery, against the likely backdrop of an imminent worldwide recession. Section 8 considers the short-term impacts and the measures which need to be taken to support the recovery and rest of the tourism sector post COVID-19.

Building on the outcome of Stage 1, the next stage will be to identify and assess options and scenarios for creating a visitor destination which will grow overnight stays; encourage visitors to explore further; support the growth and development of cycling / cycling related tourism and enrich the visitor experience of the area.

## 2. The Pleasley Visitor Hub proposition

### 2.1 Cycle tourism hubs

The VCSR plan adopted in 2018 introduces the concept of **cycle tourism hubs** as an important way to make the area's cycling opportunities more visible to visitors, create a stronger visitor destination and enable and encourage visitors to go cycling. Hubs are an important focus for investment because they:

- Deliver a critical mass of product in one location, creating stronger and new mini-destinations that can be taken to market in a coordinated way
- Deliver a concentration of complementary business activity strengthening commercial sustainability for small businesses through increased footfall
- Capitalise on the investment that has already been made and is planned for the area's cycling infrastructure and complementary developments e.g. leisure facilities, new accommodation<sup>2</sup>
- Showcase the landscape and the local heritage and their stories
- Encourage business investment and create the conditions to encourage and support new business start-ups, including pop-ups, allowing businesses to test out new ideas at low risk

The plan outlines that a hub needs to be on a main cycling trail, or close by, and to have the potential to accommodate a range of facilities including cycle hire/repair, café, bike storage and cycling friendly visitor accommodation. Consistent high-quality facilities and customer service, along with a clear identity for the hub shared across all businesses will be key to success.

The objective for VSCR is to have three main cycling hubs geographically across the area and over time to develop smaller secondary hubs to build up the scale and scope of the destination offer.

The Destination Plan sets out the strategic way forward, but identifies that each hub has a different mix of assets, opportunities and potential and requires additional detailed work to progress, including feasibility studies (such as this) and business plans for specific elements. Pleasley is identified as one of 3 hubs (along with Clumber/Welbeck/ Creswell and Grassmoor/ Chesterfield) seeking to deliver a credible visitor offer in an otherwise little-

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<sup>2</sup> more accommodation creates more visitors and hubs enable heritage and cycling to leverage higher spend and longer trips from these visitors in the project area

known area strategically located between the 'household names' of Sherwood and the Peak District - Hassop and the high profile Monsal trail, for example, are tantalisingly close.

The decision to include NT's Hardwick Hall within the hub acknowledges not only the intrinsic appeal of the site but also brings the leverage, investment, visitor management expertise and marketing reach of a big-hitting brand to the table.

The tourism development proposals for Pleasley as outlined in the VCSR plan were:

- A visitor centre with a visitor attraction
- A café, cycle hire, cycle cleaning and repair facilities and cycle lock up
- Short to medium cycling loops designed to appeal to Active Adults and Fun Families starting at the Mill that together take in Hardwick Hall, Clumber and Creswell, providing the opportunity to visit other attractions including the café and gallery on Welbeck Estate, Hardwick Hall, Creswell Crags Museum & Visitor Centre and the Mining Museum, Pleasley Pit
- A relocated and expanded Pleasley Vale Outdoor Activity Centre that realises its potential as an education centre and expands into tourism activity, either in Mill 1 or as a new build close by. The latter makes it easier to deliver certain elements including overnight accommodation and creating state of the art facilities that will help make the centre commercially competitive.
- To develop camping pods/a camp site as an adjunct to a 24/7 supervised Outdoor Activity Centre or on another flat area close to Mill 1
- To develop camping pods within the Country Park, which could use the Museum café and other facilities. This is a quiet location with good views and good road access. The site has strong community support, with the opportunity to create an innovative partnership working arrangement to enhance the visitor offer.
- Pleasley Pit Trust and the Land Trust are looking to create a new visitor centre, improve the café offer and toilet facilities, initially through a modular building, but in the long-term will be looking to secure HLF funding to develop bespoke visitor facilities.

Challenges identified in the VCSR destination plan included:

- Pleasley is a complex and challenging location. This is why the proposed mix of facilities is subject to this feasibility study. A tourism focus would help to create a more strategic approach to the regeneration of Mill 1.
- Pleasley Mills are unusual in that the industrial development sits within a rural area. This makes it a difficult commercial development to deliver; leisure and tourism

creates an appropriate use but 24-hour security onsite will be essential for any non-serviced accommodation

- While Pleasley Vale benefits from Conservation Area status it is not a World Heritage Site like Derwent Valley in The Peak District or Salts Mill in Saltaire, so does not attract the same attention and funding opportunities, and there are fewer conservation imperatives for regeneration
- The inclusion of a visitor attraction would significantly strengthen the hub, making it a destination in its own right but capital and revenue funding options and business models require testing. Any visitor centre/attraction is likely to require ongoing revenue funding. There may be opportunities to cross-fund the visitor centre through other commercial activity on the site managed by the Council.

Destination development based on path/ lane cycling was a possible clear differentiator when the VCSR plan was devised, especially in linking to the wider county offer. Other competitors are catching up....

For example, south of Leicester city centre the Everards Meadows development sits in 70 acres of open space with a new build brewery attraction, walking and cycling trails, coffee shop and cycle hire/ sales/ repair business. The site is easily accessible from the Leicester ring road and has direct links to NCN Route 6, the Great Central Way (ex railway), as well as the Grand Union Canal/ River Soar towpath into the city itself.

In Wales, Carmarthenshire has styled itself the 'cycling hub of Wales' based on a mix of mountain bike (forest track), family friendly (off-road) and enthusiast challenge waymarked routes. There has also been significant investment in cycling development locally with a refurbished velodrome and training facilities. The catalyst was seeking a legacy from hosting a stage of the Tour of Britain. Pembrey Country Park represents a 'hub within a hub' with a closed road circuit for cycle racing, cycle hire, accommodation, hospitality and access to the NCN 4 Celtic Trail which goes through the site.

## 2.2 Aims and objectives

A key component of the brief is to 'test the proposition of the area as a **sustainable tourism hub**, underpinned by the area's heritage assets, local environment and cycling as a zero-carbon leisure activity'. This suggests the following objectives for the project:

### **Sustainable.....**

- **Environment** - encouraging a modal shift to walking, cycling and low-impact travel
- **Well-being** – improving health outcomes for users/ visitors



- **Community** – ensuring the host community is fully engaged in development and delivery
- **Culture** – contributing to engagement with built, natural and intangible heritage
- **Economy** – building a management and financial model which retains spend locally and stimulates local production, collaboration and enterprise

.....**Tourism**.....

- **Demand** – increasing satisfaction levels, spend and dwell time from target day and stay markets
- **Supply** – increasing quality and quantity of market-relevant tourism product, including accommodation. Improving skills and capacity levels in tourism businesses

.....**Hub**

- **Scope** – ensuring all the necessary key products and services are adequately represented to deliver cycle tourism well, profitably and competitively
- **Scale** – establishing a logical ‘footprint’ which provides a critical mass of product and makes sense to the market in terms of size, location and access
- **‘Spokes’** – encouraging links with and complementary investment in the wider area

Many of the above also underpin the key principles of ‘slow tourism’ – a key global trend in the visitor economy

### 2.3 Key ingredients and success factors

Given that neighbouring areas have already successfully claimed the cycle tourism ‘space’ we need to identify what a Pleasley hub would need to offer to be successful.

<p style="text-align: center;"><b>Product</b></p> <p>Accessible and connected Trail Network            Cycle- friendly accommodation and hospitality outlets            Cycle sales, hire and repair            Consistent welcome            Complementary events programme            Information network            Interesting and attractive environment</p>	<p style="text-align: center;"><b>Market</b></p> <p>Growing local usage and champions            Clearly identified Day and Stay visitor segments            Agreed brand values, proposition and visitor offer            Visitor satisfaction and recommendation</p>
<p style="text-align: center;"><b>Governance</b></p> <p>Dynamic destination partnership            Political, community and stakeholder buy-in            Seamless and consistent delivery            Clear objectives and measurement</p>	<p style="text-align: center;"><b>Investment + Funding</b></p> <p>Completed routes (no obvious ‘gaps’) suitable for target market            High standard of ongoing maintenance</p>

## 2.4 A sound rationale?

The fact that partners have commissioned this study, show that there is merit in building on the trails network and heritage experience to grow the destination and visitor offer. Pleasley looks to have a number of key ingredients in place to become a hub tourism cycling:

- It is a key location on the cycling trails network - situated at the junction between the Archaeological Way and Phoenix Greenways
- Its central location means it is in easy reach on foot, by bike and by car from many of the project area's heritage attractions including Hardwick Hall, Creswell Crags and the Welbeck Estate – through cycle loops and good information, this hub can generate more visits and additional spend to these heritage attractions.
- The Outdoor Activity Centre is already located at Pleasley Vale – which could add to the appeal of the site for Fun Families and Active Adults. An expanded Outdoor Centre might include a wider range of facilities with the potential to attract leisure and corporate markets
- The natural and built heritage of the area adds to the visitor experience and provides an opportunity to tell the story of Pleasley – contributing to telling the heritage story of the area and providing a year-round reason to visit for tourists and educational groups
- It will open up the wider area as a destination - introducing the environment to more visitors including the extensive network of ancient woodlands, riverine habitat, open pasture and limestone gorges

However, a key part of this commission is to test and challenge this proposition and identify future requirements – in terms of product gaps, marketing and promotion and support infrastructure – necessary to realise this potential.

It is clear that any future plan to develop the Pleasley Visitor hub and enhance the tourism offer of the area cannot ignore the challenges and impact of COVID-19. The All-Party Parliamentary Group for Hospitality and Tourism has launched an urgent inquiry into measures that businesses in these sectors will need in order to successfully, reopen, recover and thrive in the aftermath of the COVID-19 crisis – *Pathways to Recovery – COVID-19 and the Hospitality and the Tourism Sectors*. It is early days, but future plans are likely to be focused on 3 areas:

- Managing the Crisis and Mitigating the impact (specifically ensuring that the sector is taking advantage of the current support infrastructure being implemented by the UK Government');

- Providing Stimulus and Accelerating Recovery;
- Preparing for tomorrow.

The key will be to have strong destination management, which serves and communicates well with both businesses and local communities. Keeping close to the DMPs and building the evidence base for enhancing the visitor product in Pleasley will be important. Simple, trusted and safe activities, backed by affordable and well-timed offers will be the key.

## 3. Policy and programme context

It is important to assess the Pleasley Visitor Hub proposition in light of the tourism policy and programme context at a national, regional and local level.

### 3.1 National

The Government launched its latest Tourism Action Plan in 2016 with a review of progress a year later. The strands of the Plan (which is determinedly aiming at increasing and dispersing international visits) are as follows:

1. The tourism landscape: strengthening coordination and collaboration.
2. Skills: boosting apprenticeships and attracting more people to careers in tourism.
3. Common sense regulation: examining the scope for deregulation.
4. Transport: making it easier for visitors to explore by rail, bus and coach.
5. A GREAT Welcome: driving continuous improvements in our visa service.

One of the key levers to achieve progress in the first strand has been the £40m Discover England fund. The criteria for competitive funding awards were:

- Develop world class bookable English tourism products to meet the needs of international consumers
- Join up tourism product through a geographical or thematic approach, capitalising on England's international gateways and hubs
- Drive a collaborative and partnership approach to delivery involving the public and private sectors
- Deliver solutions to barriers to international travel to England

A small number of the projects funded are of direct or indirect interest for Pleasley:

- Support for improving Manchester Airport as an international gateway to England
- 'Make Great Memories...' campaign for England's National Parks led by Peak District National Park Authority
- 'Great Walking Trails' – led by Marketing Peak District and Derbyshire
- 'Literary Legends' and 'England's Literary Greats' - itineraries and locations linked to writers, film-makers and literature – led by Visit Nottinghamshire

Visit Yorkshire has also led on a 'Cycle England' shared with Lincolnshire to trial bookable cycle breaks, although results are not yet available.

### 3.2 Tourism Sector Deal

As part of its wider industrial strategy Government agreed a Tourism Sector Deal in 2019. This seeks to ensure the sector is ready for the continuing increase in both international and domestic tourism anticipated up to 2025 particularly to boost productivity, develop the skills of the UK workforce and support destinations to enhance their visitor offer. It is early days for the growth deal but there is an aspiration for putting forward a Tourism Zone proposal based on the D2N2 footprint (see below) or even the wider East Midlands. Cycling would be an important component of any such bid.

### 3.3 D2N2

D2N2 is the Local Enterprise Partnership serving Derby and Derbyshire and Nottingham and Nottinghamshire. Its Growth Strategy Vision 2030 identifies the visitor economy as a key contributor, with a clear aspiration for the region to become one of the 5 designated Tourism Zones:

#### *Visitor Economy*

*The Visitor Economy is important in employment terms for city and rural economies and also generates significant income through visitor spending (more than £6bn in East Midlands in 2016, with £1.6bn in Derbyshire alone), as well as helping to raise the profile of the area externally. VisitEngland / VisitBritain predict that inbound tourism to Britain is due to grow by 3.8% every year until 2025<sup>3</sup>.*

*In D2N2 we have opportunities to exploit our outstanding natural, heritage, cultural and sporting assets to increase the value of the Visitor Economy. There are opportunities to boost the value and productivity of the sector by targeting new markets, offering higher value experiences, extending the 'season' and increasing the global market share of international leisure visits, business visits and the events sector.*

*D2N2's heritage assets are distinctive to our area, reflect our rich and varied history and can be a source of high value visits. D2N2 has already invested Local Growth Funding in key heritage attractions such as Nottingham Castle and the Sherwood Forest Visitors' Centre. There is potential to develop marketing and capital investment approaches to enhancing other assets, such as through the Derwent Valley Mills world heritage site. We will also be agile to the opportunities offered by the Tourism Sector Deal, such as Tourism Action Zones, to develop our priority visitor economy sector.*

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<sup>3</sup> ...and, probably more importantly, domestic tourism by 3% pa

*Working in partnership through the Midlands Engine, we will seek to exploit the opportunities of enhanced connectivity provided by East Midlands, Birmingham and other key airports and particularly High-Speed Rail, with a focus on the most lucrative markets including the USA, China and India. The 'Experience economy' continues to expand, requiring continued investment in 'experience' facilities to promote vibrant destinations.*

The D2N2 Local Growth Fund has supported Visitor Economy investment at the new Sherwood Visitor Centre (where RSPB is the development partner), as well as cycling route infrastructure in the cities of Derby and Nottingham.

### 3.4 Destination Management Organisation(s)

#### 3.4.1 Derbyshire and Peak District

Marketing Peak District and Derbyshire (MPDD) leads on The Peak District and Derbyshire Growth Strategy for the Visitor Economy which runs until 2020, to champion the Peak District and Derbyshire as a great place to visit, live, work and play. 'A world class destination' offering rich experiences in a cherished landscape, having an unrivalled reputation for heritage, culture, the outdoors, walking and cycling, with a year-round programme of events and festivals.

The strategic direction of the Derbyshire Visitor Economy closely aligns with Visit England's Strategic Framework for Tourism 2010 – 2020 which aims to maximise tourism's contribution to the economy, employment and quality of life in England. It sets out the ways in which the industry can work together to realise the framework's growth ambition of 5% year on year in the value of tourism, creating an additional 225,000 jobs and £50billion of expenditure by 2020.

Four independent objectives have been identified to address the opportunities and challenges for England's visitor economy:

- To increase England's share of global visitor markets
- To offer visitors compelling destinations
- To champion a successful, thriving tourism industry
- To facilitate greater engagement between the visitor and the experience

Visit Peak District and Derbyshire is a key strategic delivery partner and has been identified as one of fourteen primary destinations in the Growing Tourism Locally Campaign. There are 6 strategic aims:

***Strategic Aim 1: Maximise the impact of the visitor economy in key destinations and hubs***

***Strategic Aim 2: Capital investment to improve the visitor offer***

***Strategic Aim 3: Create a leading cultural, festivals and events destination***

***Strategic Aim 4: Maximise the potential for growth through tactical marketing campaigns***

***Strategic Aim 5: Develop a successful thriving tourism industry***

***Strategic Aim 6: Develop a consistent brand for the Peak District***

The first 2 are particularly relevant to this study:

**STRATEGIC AIM 1: Maximise the impact of the visitor economy in key destinations and hubs**

There are three different types of visitor hubs in the area: Gateway Cities and Towns; Destination Cities, Towns and Villages; and Other Hubs.

‘Gateway Cities and Towns’ are the major urban areas used as a base by visitors, they include cities such as Manchester and Sheffield and towns such as Knutsford and Chesterfield. Market towns need to be supported to maximise their strategic role in the economy; this can be as much about changing the culture of how they operate, for example, opening on Sundays, to the overall offer of the town to make it an attractive place to visit and spend time.

‘Destination towns and villages’ are places that visitors head for to eat, drink, shop, and stay. They include Derby, Bakewell, Buxton and Matlock Bath amongst others and play an important role in the rural economy by offering employment opportunities to local residents.

‘Other hubs’ can include areas that are aligned to a particular heritage, sporting or leisure activity. For example, Hassop and the Monsal Trail area is a significant cycling hub and, given the importance of the cycling strategy in the National Park, should be encouraged to act as general visitor hubs as well.

Overarching this, there is a recognition that visitors must be provided with succinct information that is easy to find from when they arrive through different contact points across the destination. Offering improved connectivity between gateways, destinations and hubs will allow visitors to travel around the area and get from A to B as simply as possible.

## Objectives:

- To strengthen, or establish where necessary, transport connectivity between gateway towns and neighbouring cities.
- To improve connectivity between public transport services, accommodation, visitor attractions, and cycle routes in and around hub & gateway settlements
- To improve signage, interpretation and information services in hub and gateway settlements to maximize visitor dispersal, activity and spend. Partners must work together in creating a real sense of place.
- Improve the visitor experience by meeting their expectations, this includes, cleanliness, safety and security
- Support Destination strategies to unlock additional funding opportunities to encourage local SMEs investment within key destinations and hubs to improve the visitor experience.

**Comment:** Currently Bolsover district does not feature as a gateway, destination or hub in MPDD marketing. This is partly self-fulfilling as there is not a critical mass of Bolsover visitor economy businesses, signing up to MPD+D activities/ campaigns. Also, the primary thematic appeal of the area from an MPD+D perspective is in the 'big name' brands and attractions – Hardwick Hall, Creswell Crags, Bolsover Castle rather than the (comparatively) under-developed cycling/activities product.

## **STRATEGIC AIM 2: Capital investment to improve the visitor offer**

Visitor attractions and quality of accommodation are very important elements of the visitor offer. Across Derbyshire there is a huge range of attractions to meet the needs of all consumers. Whilst the County has a USP in its stately homes, it also offers a good mix of other attractions including heritage railways, wildlife parks, visitor centres, galleries and small museums. Derbyshire also boasts walking and cycling routes, theme parks, parks, gardens, museums, and art centres.

An independent Tourism Impact Study undertaken by Colliers International identified a significant number of planned and potential investment opportunities across the County covering a range of themes including attractions; accommodation; access; activities and sports etc. In most cases, it is existing attractions and sites which could play a more significant part in the visitor offer of the area, and there are real opportunities to capitalise on the benefits of such capital infrastructure investment including increased employment, visitor spend and new visitors.



## Objectives:

- Identify where added value can be achieved through the commissioning of feasibility studies e.g. understanding consumer behaviour and expectations
- Prioritise capital spend based on evidence through feasibility studies/stakeholder consultation that offers the greatest return on investment.
- Enable this area of activity to attract new visitor segments to the area, providing real growth opportunities

**Comment:** The new Peak District and Derbyshire Tourism Plan for 2021 onwards is in development. There is likely to be an intensification on cycling/ walking and public transport both for getting to, and around, the destination, in line with the Peak District National Park's aspiration for zero net carbon by 2025.

### 3.4.2 Nottinghamshire

While Marketing NG remains the Destination Marketing Organisation for Nottingham City, Nottinghamshire County Council has now led on the development of the first Visitor Economy Strategy for the wider county, which in turn seeks to embrace the tourism aspirations of each of the districts. There is significant member and office buy-in at county level and the resources and capacity to roll out its implementation are currently being put into place. The plan seeks to achieve 5% real-terms growth by 2023 thus delivering:

- 1 million additional visitors
- 742 additional FTE jobs
- £57.5 million additional economic impact
- (direct and indirect)
- £18 million additional GVA

The strategy takes the world-renowned stories and associations with Sherwood and Robin Hood, to develop 2 thematic pillars of 'Green and Active', and 'Free Thinking'

The two markets with growth potential for day trips and UK short breaks are Country Loving Traditionalists and Aspirational Fun Families. These are two segments identified as priorities by Visit England, selected because they have a strong fit with what Nottinghamshire can offer. Nottinghamshire's central location means it has a large audience within a two-hour drive time. These near markets provide excellent opportunities to build loyal repeat day visitors and near short breaks among people who are likely to enjoy what the County has to offer.

Other destinations will be targeting these segments too. **There are opportunities to grow Nottinghamshire's tourism by collaborating with neighbouring Counties** to achieve maximum reach where it makes sense to do so, e.g. on sports with Leicestershire, **cycling with Derbyshire.**

**Country Loving Traditionalists** – empty nesters with traditional values, who are likely to have recently taken a countryside break in England. They travel as a couple, looking for unspoilt countryside and want to feel “connected to the country’s history and heritage” with opportunities to eat local food and produce.

**Aspirational Family Fun** - information-hungry, living in cities with children at home. They regularly take breaks where they can indulge in active, family-friendly pursuits, such as sporting events and festivals. They like water-based activities. They are active on social media.

Under the Green and Active theme, the Plan outlines the following aspirations.

Nottinghamshire is a rural county; the focus must be on delivering an engaging and distinctive green and active countryside experience:

- Give (Robin Hood and) Sherwood a much stronger visibility across the County, particularly in the North of Nottinghamshire, and use it as shorthand for “green and active”
- Make Edwinstowe an exciting visitor hub in Sherwood Forest – realising the potential of its natural assets, attractions and facilities, and creating more product
- Deliver more things to do in the countryside that are branded, connected to the Sherwood and Robin Hood theme, and which incorporate the latest digital technology and innovations in visitor experiences
- Create itineraries and packages designed to deliver what visitors are looking for and which make it easy for them to book online - itineraries that combine attractions, places to eat, places to shop and places to stay
- Develop the most powerful of our free-thinking stories into experiences that encourage visitors to explore further and dig deeper into our history
- Make more of our market towns
- Create reasons for visitors to explore beyond the city and deeper into Nottinghamshire – and make it easy to do that.

Importantly the Strategy identifies specific actions to be delivered, *inter alia*:

Make the off-road walking and cycling a much stronger visitor experience. Key actions:

- Deliver a network of well signed trails and circular routes with themed interpretation and create easy-to-find downloadable route maps (over time use the latest GPX data)

Work with **Derbyshire County Council** to develop tourism cycling opportunities across the D2N2 area. Key actions:

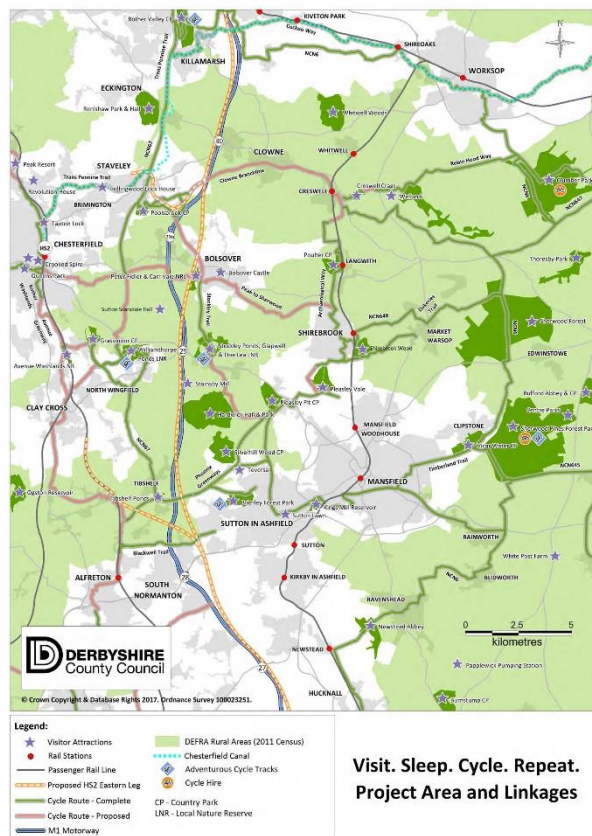
- **Develop a D2N2 plan for local cycling infrastructure to link with visitor attractions –** use for Growth Fund application
- **Deliver North Nottinghamshire parts of the Visit Sleep Cycle Repeat project**

### 3.5 Visit Cycle Sleep Repeat (VCSR)

This report represents a direct local response to the VCSR destination plan and its recommended actions developed for the NE Derbyshire/ NW Nottinghamshire area in 2018 on behalf of the Bolsover Countryside Partnership.

#### THE PROPOSITION

The proposition for the destination is ‘The countryside on your doorstep to explore on a bike’ - presented as easy cycling and an affordable short break for people looking for active fun, targeting the growing population who enjoy getting around on a bike and live within 90 minutes of the area. Occasional cyclists are likely to be fair-weather cyclists too. It will be important to offer and promote things to see and do that are indoors, helping to extend the season into the Spring and Autumn shoulder months. This positioning capitalises on the opportunity of the large and growing population in the catchment. It gives a clear reason to visit and can work with other propositions and destinations in Nottinghamshire and Derbyshire. It builds on reasons why people visit already and can work with community cycling as well.



Some joint cross-border working, anticipated by the original VSCR plan, has started, but, as with other aspects relating to the delivery of the VSCR, this is at a slower pace than originally envisaged, due to the availability of resources amongst partners and the capacity to delivery specific projects outlined within the plan. The Bolsover Countryside Partnership has recently secured £650,000 of funding to deliver initial elements of the plan.

### 3.6 Local authority

The proposed Pleasley Hub lies within Bolsover District. The Council appointed a Tourism (and Town Centres) Officer in 2019 after a number of years without a dedicated staff member. A district tourism plan is currently under development, with firm political buy-in. The Council sees the area's key assets as access and centrality, along with the appeal of 3 major heritage attractions, Hardwick Hall, Bolsover Castle and Creswell Crags. In order to gain base level information, the District has commissioned a STEAM report, which estimated 2.7m visits per year of which 90% are day visits generating £139.84m value and supporting 1,700 fte jobs. Of those visitors who do stay overnight, the majority are visiting friends and relatives. The average stay is 2.3 nights.

Tourism does not recognise local authority boundaries and it will be important that there is buy-in from all local authority partners represented on the Visitor Economy Consortium. All the neighbouring authorities recognise the significant potential economic impact that tourism can bring to the area and a number are looking at increasing their support for the sector. A number have entered into Service Level Agreements to support delivery of a tourism service, e.g. Chesterfield and North East Derbyshire.

#### **Summary**

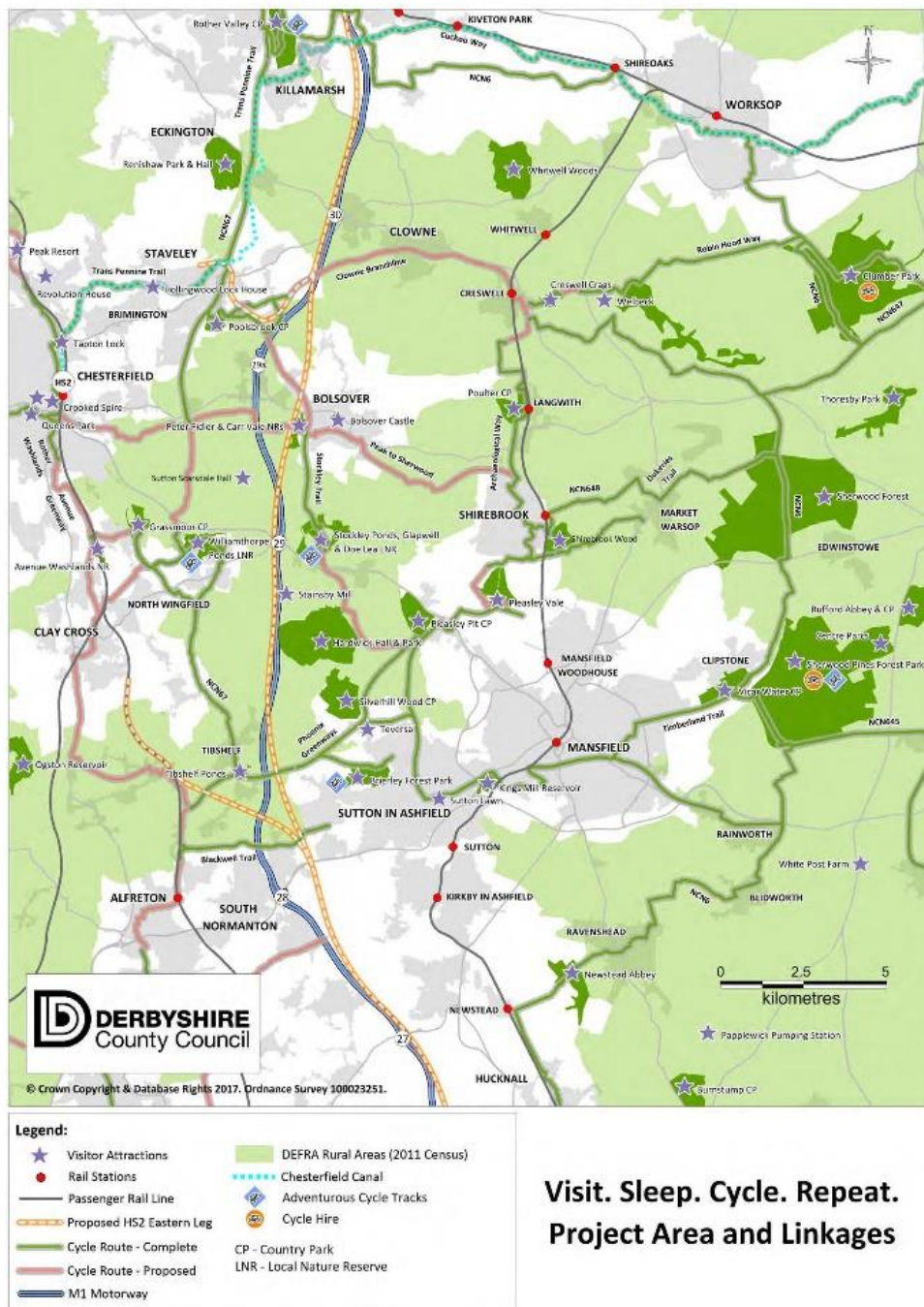
Analysis of the national, regional, destination and local strategic context shows significant policy alignment and ongoing support for the visitor economy overall and cycle-based tourism as a major theme in particular. What is clear however is that the opportunity at Pleasley is currently being by-passed not least because of geography and the immediate appeal of the neighbouring Peak District and Sherwood brands.

## 4. Tourism in the Pleasley Hub – situation analysis

### 4.1 Geographic scope

#### 4.1.1 VSCR area

The Visit.Sleep.Cycle.Repeat. geography is not recognised as a defined tourism destination. As outlined in the map below, the area boundary is defined by the roads and cycle routes. In many respects, it is the ‘hole in the doughnut’ between the established tourism destinations of Sherwood Forest to the east and the Peak District to the west.



The area does have a number of distinctive features:

- Largely rural in nature;
- Swathes of green spaces many reclaimed from former pits (including a number of country parks, nature reserves);
- Strong features associated with its coal mining heritage: the area includes a number of ex-mining towns;
- Good road connectivity particularly the M1 and A60, which connect the area by road north and south;
- Good access to large population centres and
- Several historic country estates.

The area lacks a clear identity and the Destination Plan emphasises that work needs to be done to create a destination.

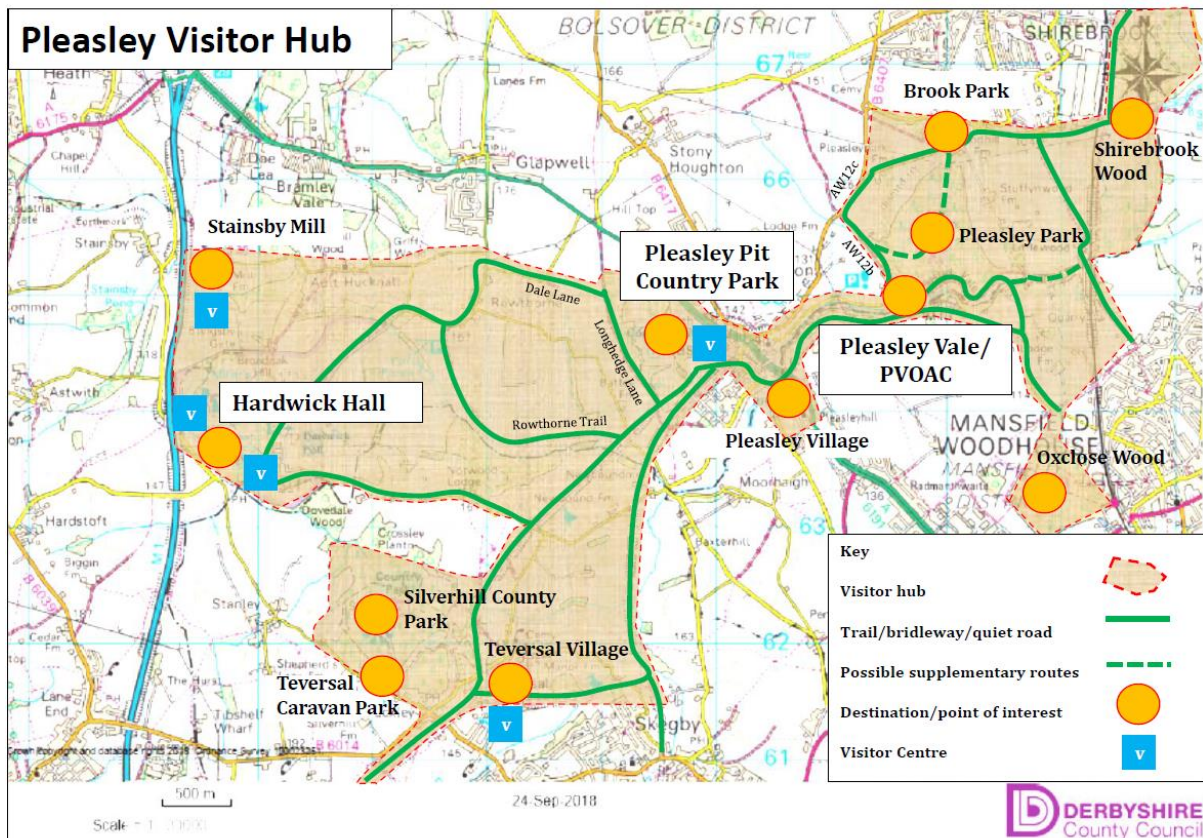
#### 4.1.2 Pleasley Visitor Hub

The Pleasley Visitor hub is located on the Nottinghamshire – Derbyshire border and includes three main destinations:

- a. Hardwick Hall
- b. Pleasley Pit and Country Park
- c. Pleasley Vale Outdoor Activity Centre

A detailed review of each of the destinations is set out in sections 5 and 6 and an analysis and assessment of the tourism product is included later in the report.

The map below outlines the geography and proposed boundary for the Pleasley Visitor Hub.



In addition to the main destination points (Hardwick Hall; Pleasley Pit and Country Park and Pleasley Vale Outdoor Activity Centre), the Pleasley hub includes a number of other destinations / points of interest connected by the plethora of trails and routes that criss-cross the area.

Situated on the Hardwick estate and owned by the National Trust, **Stainsby Mill** is a 19<sup>th</sup> century flour watermill, which has been restored to full working order. The mill includes a small range of visitor facilities including a car park and other facilities such as a restaurant, kiosk, shop and WCs are available at Hardwick Hall. The Mill has a good TripAdvisor rating although it is predominantly seen as being part of the overall estate visitor experience.



*Stainsby Mill, Hardwick*

Plans to improve connections between the mill and main Hardwick Hall and Gardens will enhance the destination appeal of the Mill within the hub.

Formally two colliery sites, the Forest Commissions' **Silverhill Woods** has been transformed into an impressive green space and woodland. As well as boasting the highest point in Nottingham, Silverhill Woods provides a range of trails for walking, cycling and horse riding.



*Silverhill Wood*

Close to Silverhill Woods, the **Teversal Trails** Visitor Centre provides an important starting / stopping-off point with trail connections to Pleasley Pit Country Park (Teversal Trail) and a link trail to Skegby. The area includes two sites of special scientific interest and five sites of importance for nature conservation. The centre and café are run by volunteers and open every day (except Mondays). Although located close to a residential area, the centre provides good quality visitor infrastructure, including a large car park. Close by is the AA 5



Pennat Awarded Teversal Holiday and Caravan and Camping Park. Teversal is an established campsite, which offers a range of facilities including self-catering accommodation.



*Teversal Visitor Centre*

The area to the east of Pleasley Vale has a more disparate visitor offer. **Shirebrook Wood**, a reclaimed colliery site, is a picturesque woodland that provides a range of small-scale facilities including walking and cycle trails and a picnic area.

It is important to also recognise that the wider area includes a number of facilities and activity products that enhance destination appeal, including:

**Glapwell Countryside site:** as well as access to the Stockley Trail, the site accommodates a 2km blue-grade trail, which provides an additional product for more experienced cyclists.

**Brierley Forest Park:** the site has a large visitor centre, children's play area, sculpture trail and a network of walks (although it does have a much greater urban feel than others sites in the area).

The assessment perhaps demonstrates that the geographic scope and coverage of the proposed hub needs to have fluid boundaries to reflect the various destination products, which resonate with the visitor. This will also need to be reflected in terms of future branding and marketing. It will be particularly important that the visitor hub connects via

the wider network of routes and trails through routes including the Phoenix Greenways and the Five Pits Trail.

## 4.2 Socio-economic conditions

The area has a wealth of environmental, historic and cultural assets and its location is an important strategic advantage in securing future economic growth. However, the evidence shows that Bolsover continues to face a number of significant barriers and challenges in relation to revitalising its fortunes.

- The economy is behind the national average in terms of GVA per head, although it is growing at a much faster rate than nationally
- There is under-performance on business churn and growth, recording comparatively low business birth and death rates
- Bolsover District has a generally older population with an above average population in all age groups over 40 compared to the East Midlands average. In 2016, the percentage of people aged 65 or over was 20% of the population (and rising).
- The population is set to rise by around 10.2% by 2033
- Health is a significant issue for people in the District, with 24.7% of people indicating that their day-to-day activities are limited by their health. Residents of Bolsover District have the highest obesity rates and lowest healthy eating in the country. It has the highest levels of smoking, and high levels of early deaths from cancer and circulatory conditions compared to the rest of the county and England as a whole

Supporting regeneration of the towns and main villages is a key priority to enable them to function and fulfil their role as service centres as well as providing greater local job opportunities to reduce out-commuting and improve sustainability outcomes.

The Pleasley Visitor Hub proposal has the potential to contribute towards economic, social and environmental outcomes. Providing cycling and walking facilities for visitors will also benefit local residents and help improve health outcomes. Clearly, it will be important to ensure that facilities and services are accessible and affordable to local people.

## 5. The 3 key destination centres: Fact File

### 5.1 Pleasley Vale and the Outdoor Activity Centre

Pleasley Vale Outdoor Activity Centre is owned and operated by Bolsover District Council and delivers a range of adventurous indoor and outdoor activities from its base at Pleasley Vale. Pleasley Vale is a regionally significant heritage site containing three historic mills alongside rich habitats and 44 hectares of woodland. The centre aims to enhance the quality of life of the residents of the District, particularly young people, through engagement in outdoor and indoor adventure-based activities encompassing recreation, leisure and educational experiences. Since 2009, the centre has been based in “the Grease Works”, which has been renovated to provide office, classroom and storage space for the centre. The PVOAC has a number of other satellite facilities around the business park that it uses to deliver a host of activities, including the main attractive waterbody (former mill pond).

#### Facilities and Services

Facility	Service / activity
Mill Pond	Boathouse (with changing rooms etc), jetty and 0.6 ha pond, which is used for canoeing, kayaking and rafting (all abilities, including novices)
Mill building	Unit used as an archery range for groups of up to 8
Outside space / woodland	Outside space used for a range of teamwork activities, environmental work and bush craft.
The Grease works	Training/meeting room for groups of up to 30
Land surrounding the Grease works	Land area used for car parking, group works, games, garage unit and storage



*Jetty and Lake*

### Current Market

The centre attracts around 3,500-5,000 visits per annum and delivers 960 hours of activity. Group sizes vary up to as many as 181. Just under half of current users (49%) spend over 3 hours with the centre; a further 49% spend around 6 hours. The remaining 2% spend their time on 2-hour activity bookings (parties and evening groups).

The centre works almost exclusively with pre-booked groups including schools (primary and secondary), colleges, community groups, uniformed organisations as well as a number of third sector partners.

The centre, in conjunction with Extreme Wheels, has organised an annual Adventure Sports Festival at Pleasley Vale in July. The event has proved a success, attracting around 300 participants each year.

### Investments and Future Plans

Following investment in the Grease Works, facilities have been enhanced including construction of a fully accessible jetty and floating pontoon and investment in indoor and outdoor equipment.

A core objective is to increase capacity and the numbers of users of the centre, thus increasing revenue and resources. As part of the wider regeneration of Pleasley Vale

Business Park, a £16m Business Case and major application for HLF funding was submitted in 2014 to expand the centre through relocating the centre to Mill 1 to combine its operational base, classroom areas, indoor activity spaces and storage on one site. The proposal included converting part of the mill into a 60-bed residential centre that would allow the centre to deliver a range of multi-activity residential visits. The bid was unsuccessful as HLF only saw the project as having regional significance.

Since then, a comprehensive list of potential developments has been developed, Roller Glide, high ropes with indoor and outdoor elements etc, all of which are designed to expand the activity offer, which would be attractive enough to draw in the general public in sufficient numbers. An important objective remains to open up for public sessions on evenings and during weekends.

### Challenges

The site has significant potential but due to the scale of investment required, there are justifiable concerns about viability. The centre is suffering from the lack of a long-term management and investment plan. Any developments to the centre need to be done in conjunction with a master plan for the mills complex as a whole, which requires a major injection of public funding. The team is small but provides a comprehensive service to a very established client base. Without investment, there is limited scope to expand this given the current facilities, equipment and staffing.

### Future Role in the Pleasley Visitor Hub

The Outdoor Activity is well placed to be an important facility within the Pleasley Visitor hub concept. It is well-connected particularly via the Archaeological Way to connect to other hub facilities, particularly Pleasley Pit Country Park. However, the lack of a 'pay-as-you-go' activity offer is a big issue in terms of the centre becoming a must-see experience and becoming a major draw within the Pleasley hub.

The Pleasley Vale Transformation Programme demonstrates a commitment from the Council to enhance and support future investment in the Outdoor Activity Centre. However, the investment challenge is significant: the planned feasibility study work commissioned by BDC is vital to assess and develop the potential of the Outdoor Activity Centre.

## 5.2 Hardwick Hall: Fact File

Hardwick Hall, acquired by the National Trust in 1959, is one of England's most instantly recognisable country houses. Built for Bess Hardwick, this Grade 1 Listed Building, Hardwick Hall is home to one of the finest collections of Elizabethan tapestries and embroideries in Europe and includes an extensive collection of textiles, furniture, paintings, ceramics and other decorative objects. The site includes Hardwick Old Hall (owned by English Heritage) the Stable's shop and the Great Barn Restaurant. The Old Hall is a consolidated ruin, a large building which, though a shell retains its imposing height. The Hardwick Hall Registered Park and Garden forms part of the setting of the Hall and is a designated heritage asset in its own right.

The overall significance of Hardwick is centred on the life and character of its patron, Bess of Hardwick, who was a unique example in 16<sup>th</sup> century England of a woman wielding power and influence.

Hardwick Hall is a major national attraction employing 150 staff and with over 750 volunteers.

### Facilities and Services

The Estate provides a range of quality facilities and services for visitors including:

- Visitor centre and shop
- Garden shop
- Great Barn Restaurant / Coach House Kiosk
- Hardwick Hall and the Old Hall
- The gardens
- Woodland Play trail

There are also three holiday cottages on the estate, sleeping between 2-12 people.

There are many walks and trails around Hardwick Hall parkland, which link to other trails and routes in the area, specifically the Rowthorne Trail and Teversal Visitor Centre. The walks on the estate are the Lady Spencer's Walk; Miller's Walk; the Welly Walk; the Oak Walk and the Sculpture Walk.

### Current Market

The gardens and park, including the Great Barn Restaurant and Stable Yard shops, are open to the public 364 days per year, with Hardwick Hall having a slightly more restricted opening to allow for conservation works. Visitor numbers are significant. The Elizabethan Country

House Hardwick Hall is the 38<sup>th</sup> most visited Historic Property in the UK with 295,972<sup>4</sup> visitors (the actual number including ‘walkers’ is probably around 500,000). Hardwick attracts a diverse audience – by far the largest number is from existing National Trust Members. Hardwick is an interesting ‘stop-off’ point at which to break a journey on the M1 and this is an important sector for motorists and for people seeking a convenient, attractive place near the motorway to meet.

The Trust has introduced visitor programming to cater for the diverse range of visitors. The core market segment is the ‘curious minds’ day visitor market, who have a tendency to travel further due to the M1. The Estate is broadening its offer by providing a range of family-friendly activities, including quizzes, trails and hands-on activities. A range of family activities are also provided during the school holidays.

The roof tour of the main house has proved very successful and future proposals include a single ticket offer for the house and garden and a “below stairs” tour.

The property does attract cyclists, including local cycling clubs and has hosted official events such as hill climbs and others.

Given its historic and geographical links with Chatsworth, Hardwick Hall is keen to attract a greater international audience. There are further heritage-based stories and narratives to relate including the birthplace of the Parachute Regiment.

### Investments and Future Plans

The National Trust has already provided significant funds in recent years to create the catering offer in the former stables and to enhance the large outdoor courtyard area. The Estate is continuously investing in up-grading and improving facilities and services. It would eventually aspire to emulate the development pathway undertaken at Wentworth Woodhouse near Rotherham which has proved very successful in attracting regular year-round throughput to its heritage attraction and associated commercial elements (garden centre, restaurants, retail).

Future investment plans to encourage overnight stays is the development of between 4-6 accommodation pods, which are planned by the lakes.

Plans are also being developed to improve connections between Stainsby Mill and the lower park.

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<sup>4</sup> Visit Britain 2018 figures.

## Challenges

A major concern for Hardwick Hall and the wider estate is HS2, where the proposed route will pass 2 km through the estate, particularly with regards to visibility, the closure of Mill Lane, infrastructure development to support HS2 and the loss of connectivity between the Park and the historic villages. However, HS2 mitigation works should have funds available for improving paths and trails in the vicinity.

Hardwick Hall sits between a number of local authorities (DCC and NCC+ a plethora of local authorities), which does present a challenge in terms of joined-up actions.

The lack of good quality serviced accommodation is a major weakness in terms of attracting more short-breaks to the area.

## Future Role in the Pleasley Visitor Hub

Hardwick Hall is the 'jewel in the crown' in terms of attractions in the region and the commitment of the National Trust to the Pleasley Visitor Hub concept is a major plus. The management team is keen for the attraction to be outward facing and link with other tourism programmes which improve the quality of the visitor offer and encourage visitors to stay longer in the area and spend more in the local economy.

### 5.3 Pleasley Pit and Country Park: FactFile

Pleasley Pit and Country Park is a significant local destination for its mining heritage, nature conservation and walking and cycling interests.

Pleasley Pit was the oldest and deepest pit in the East Midlands; the first shafts at Pleasley colliery were sunk between 1872 and 1875 and the colliery ceased production in 1983. The buildings were listed in 1990 and, following investment by East Midlands Development Agency (EMDA), designated as a scheduled ancient monument. The area has been subject to a number of regeneration schemes and programmes and was passed to the Land Trust to take forward in partnership with Pleasley Pit Trust, to further restoration work.

The site has now become a popular tourist attraction and with funding from LEADER a new visitor centre and café has recently opened on site. The impressive colliery headgear and parts of the colliery represents an iconic backdrop of the site and provides a strong connection to its previous importance and industrial use. The steam powered engines further enhance this heritage link at the site.

The Country Park is managed by Derbyshire County Council's Countryside Service with the support of the Pleasley Pit Nature Study Group and was designated as a Local Nature Reserve in 2011 for its nature conservation value. It contains a wide variety of habitats including ponds, reed beds, grassland and small plantation woodlands that are slowly maturing.



### Facilities and services

The newly created temporary **visitor centre** includes space for the local community, café, heritage display space, events and activities as well as areas for educational visits and talks.

The museum has an extensive collection of mining memorabilia. **Pit Buildings** include the impressive North and South Winding Engines and South Shaft Pit Top.

The Country Park contains a number of paths and trails and is located at the junction between the Archaeological Way and the Phoenix Greenways. The Council's management structure is currently under review and it appears likely that the country park will come under a newly formed Public Sector Mutual (this is to be confirmed). Plans are currently under development to create a camping pod site on the Country Park

The small bridge adjacent to Terrace Ponds provides a popular spot for taking local photographs at the site.

### Current Market

The core market includes walkers (local); heritage enthusiasts, schools / education visits and general holiday makers (specifically day trippers).

### Investments and Future Plans

Pleasley Pit is an emerging destination and the new visitor centre and café means that it has a good range of facilities and attractions to build its appeal further. Additional investments are planned to enhance the offer further including a play-trail, developing the events market and introducing facilities and services for cyclists. A proposal to develop a camping pod site on the country park is currently being assessed.

### Challenges

Despite being a temporary structure (10 years temporary planning), the new visitor centre will test the proposition and significantly enhance the offer for both visitors and the local community. As well as successfully 'bedding-in' the new facility, future challenges include:

- Lack of accommodation to attract the short-break market;
- Brand identity
- Addressing anti-social behaviour
- Connecting the trail network

It is important to acknowledge that car parking capacity is already an issue on the site on peak days and event days and further capacity is needed if the Hub is to develop further.

### Future Role in the Pleasley Visitor Hub

There is a commitment from the Land Trust and Pleasley Trust to make the site cycle-friendly.



## 6. Market analysis

### 6.1 Demographic profile

As part of this study we have carried out a demographic review of the residential population living within the 0 to 30 minutes, 31 to 60 minutes, and 61 to 120 minutes using drivetime contours. The drivetime profiles of Pleasley Pit Country Park were used as this represents a central location within the hub.

The further residents are located away from Pleasley, the propensity to visit / use the tourism and recreational facilities will decrease and the degree of competition will be greater (people have more alternative cultural and heritage options open to them).

In terms of exploring the opportunities to introduce proposals for Pleasley Hub and VSCR, it is important to understand the local and wider sub-regional demographic profile. The local residential market, particularly within the immediate 0 to 30-minute drivetime isochrones is likely to be the key driver of users, with the wider catchment (up to 60 minutes likely to be the main source of event and activity-based visits). However, it is recognised that key tourism assets such as Hardwick Hall have the market profile and cachet to draw in both day and tourist visitors from further afield.

From a tourism perspective, the two-hour catchment is also considered as this is an important catchment for typical short break visits. It should be noted that visitor flows generated from the tourism market are subject to seasonal fluctuations and have different needs to the local residential marketplace.

#### *Headline population*

Headline residential figures are presented in the table below.<sup>5</sup> Within the immediate core 30-minute drivetime contour market place the population is just below 666,000 (665,864) residents which is reasonable. Within the overall one-hour profile, the population increases to just over a 3.75 million residents (3,767,036), which represents a high base for leisure and tourism uses. Overall, with two hours, the total catchment market is close to 17 million residents (16,917,552), which is very strong.

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<sup>5</sup> All demographic data and maps supplied by CACI: Crown copyright 2013. Source: Office for National Statistics licensed under the Open Government Licence v.3.0. © Crown Copyright. Data supplied by National Records of Scotland. Source: NISRA : Website: [www.nisra.gov.uk](http://www.nisra.gov.uk) Contains Ordnance Survey data © Crown copyright and database right 2013

Drivetime contour (minutes)	Households	Population
0 to 30	286,850	665,864
31 to 60	1,304,530	3,101,172
61 to 120	5,426,390	13,150,516
<b>Total</b>	<b>7,017,770</b>	<b>16,917,552</b>

### Age profile

We set out below a breakdown of the age profile of residents living within the three drivetime catchment areas<sup>6</sup>;

Population by Age	0 to 30 minutes			31 to 60 minutes			61 to 120 minutes		
	Area population	Area % by age group	Index av=100	Area population	Area % by age group	Index av=100	Area population	Area % by age group	Index av=100
0-4	38,012	5.7	92	187,767	6.1	98	851,763	6.5	105
5-7	21,455	3.2	95	104,316	3.4	99	473,314	3.6	106
8-9	13,579	2.0	95	65,221	2.1	98	296,074	2.3	105
10-14	38,471	5.8	100	176,084	5.7	98	791,618	6.0	104
15	8,421	1.3	103	37,314	1.2	98	167,484	1.3	104
16-17	17,185	2.6	104	76,519	2.5	100	336,573	2.6	104
18-19	15,594	2.3	90	96,532	3.1	119	361,839	2.8	105
20-24	37,614	5.6	83	239,630	7.7	114	925,155	7.0	104
25-29	38,767	5.8	85	199,526	6.4	94	889,003	6.8	99
30-44	131,721	19.8	97	611,602	19.7	96	2,662,331	20.2	99
45-59	139,656	21.0	107	605,265	19.5	100	2,531,060	19.2	98
60-64	44,770	6.7	111	187,918	6.1	100	778,443	5.9	98
65-74	66,289	10.0	115	273,385	8.8	101	1,111,120	8.4	97
75-84	39,327	5.9	106	173,094	5.6	100	701,167	5.3	96
85-89	10,096	1.5	104	44,837	1.4	99	181,779	1.4	95
90+	4,907	0.7	98	22,162	0.7	95	91,793	0.7	92

<sup>6</sup> Please note the figures are highlighted where the difference is 10% or greater than the index figure

Within the overall 30-minute drivetime profile, there is a higher than average representation of all age groups over 45 years old up to 90 when compared to the index figure.

In respect of the core family market, the representation of adults aged 25 to 45 is below the index figure across all three drivetime profiles and this is more pronounced within the immediate drivetime contour. Within both the 0 to 30 and 31 to 60-minute drivetime profiles, the number of young children (0 to 9 years old) are below the index figure. This means there is a challenge to attract a significant level of visitors from this core family market place.

Outside of the 30-minute catchment there is a higher proportion of adults age 18-24, which is significantly above the national average. This may be due in part to the level of further education establishments located within this catchment. The age range of the population living between 1 and 2 hours from Pleasley is more closely aligned with the national average.

### Social grade

We set out below a breakdown of the social grades of residents.

Social Grade	0 to 30 minutes			31 to 60 minutes			61 to 120 minutes		
	Area Profile	Area %	Index av=100	Area Profile	Area %	Index av=100	Area Profile	Area %	Index av=100
AB: Higher/intermediate managerial /admin / professional	31,711	15.3	69	185,435	19.3	86	806,282	19.9	89
C1: Supervisory, clerical, jr managerial/admin/professional	57,003	27.6	89	280,790	29.2	94	1,206,669	29.8	97
C2: Skilled manual workers	52,867	25.6	123	212,877	22.1	106	864,168	21.4	102
DE: Semi-skilled and unskilled manual workers, on state benefit, unemployed, lowest grade workers	65,160	31.5	122	282,900	29.4	113	1,166,909	28.9	111

Across all three drivetime profiles the representation of residents from the AB (higher/intermediate managerial /admin / professional) social grade are substantially below the index figure, particularly within the immediate 0-30 and 31-60-minute drivetime profiles drivetime catchments (by 31% and 14% respectively). These social groups have a higher propensity and disposable income to visit leisure attractions and experiences (and in particular heritage experiences).

The representation of the C1 socio-economic group (is also at a low level compared to the national average index) across all three catchments.

C2 and DE groups are significantly over-represented which will impact on some uses. If an activity project or event venue is taken forward it will be important to ensure that it is appealing and affordable for a wider audience base.

Unlike walking it is important to recognise that cycling is a relatively expensive leisure activity to take part in (purchasing a bike, equipment and clothing) and the socio-demographic structure of the residential population (and their associated level of consumer spending power) does have clear product implications.

### *Economic activity*

The table below highlights the economic profile of the residential population living within the three profiles.

Economic Activity	0 to 30 minutes			31 to 60 minutes			61 to 120 minutes		
	Area Profile	Area %	Index av=100	Area Profile	Area %	Index av=100	Area Profile	Area %	Index av=100
<b>Economically active</b>	335,205	68.2	98	1,543,388	67.4	97	6,626,592	69.1	99
- Employee full-time	190,052	38.7	100	846,032	36.9	96	3,678,537	38.3	99
- Employee part-time	74,634	15.2	111	328,050	14.3	105	1,342,272	14.0	102
- Self employed	37,585	7.6	80	179,192	7.8	82	802,316	8.4	88
- Unemployed	21,574	4.4	100	107,800	4.7	107	466,331	4.9	110
- Fulltime student economically active	11,360	2.3	67	82,314	3.6	104	337,136	3.5	102
<b>Economically inactive</b>	156,391	31.8	105	746,989	32.6	107	2,968,932	30.9	102
- Retired	82,965	16.9	121	335,455	14.6	105	1,326,772	13.8	99
- Full-time student economically inactive	17,336	3.5	61	159,512	7.0	120	575,797	6.0	104
- Carer (looking after home or family)	20,201	4.1	96	94,473	4.1	97	426,810	4.4	104
- Long term sick or disabled	27,171	5.5	130	108,476	4.7	111	418,695	4.4	103
- Other economically inactive	8,718	1.8	82	49,073	2.1	99	220,858	2.3	107
Unemployed aged 16-24	7,033	1.4	115	33,582	1.5	118	134,555	1.4	113
Unemployed aged 50-74	3,736	0.8	93	18,175	0.8	97	81,766	0.9	105
Unemployed: never worked	3,444	0.7	100	18,732	0.8	116	81,202	0.8	120
Long-term unemployed	8,568	1.7	101	42,305	1.8	107	186,776	1.9	113

The number of **economically active residents** across all three drivetime profiles are just below the index figure but close to national index norms. Within these figures, there are however high levels of part-time employees and low levels of self-employed (by some 8% to

20% below average). The number of unemployed residents within the 31 to 60 and 61 to 120 drivetime catchments are higher than the index figure by 7% and 10% respectively.

There are high levels of **economically inactive residents** (including those residents classified as unemployed) within the catchments up to 60 minutes. Economically inactive residents within the immediate drivetime contour who have higher levels include those classified as long-term sick or disabled (15% above national average) and youth unemployment (+15%) and retirees (+ 21%).

There is a relatively high student population within the 31-60 contour who could represent an important market group for activities in the VSCR destination and a potential volunteer resource, subject to the proposals being taken forward for the area.

### 6.1.2 Future population growth

The table below shows the projected population change for English regions, mid-2016 to mid-2026. The average growth for England is 5.9%, which is below the forecast growth for the East Midlands at 6.0%.

**Projected population change for English regions, mid-2016 to mid-2026**

Region	Mid-2016 population	Mid-2026 population	Population change over 10 years	Percentage change
London	8,770,000	9,543,000	774,000	8.8
East	6,129,000	6,573,000	444,000	7.3
South West	5,517,000	5,881,000	364,000	6.6
South East	9,030,000	9,605,000	574,000	6.4
<b>East Midlands</b>	<b>4,725,000</b>	<b>5,008,000</b>	<b>283,000</b>	<b>6.0</b>
West Midlands	5,811,000	6,125,000	314,000	5.4
Yorkshire and The Humber	5,425,000	5,616,000	190,000	3.5
North West	7,224,000	7,467,000	243,000	3.4
North East	2,637,000	2,687,000	50,000	1.9
England	55,268,000	58,506,000	3,238,000	5.9

Source: Office for National Statistics

## 6.2 The existing tourism product / competitive landscape

### 6.2.1 Serviced accommodation

The VSCR report acknowledged a shortage of serviced accommodation in the destination area. The main existing supply of visitor accommodation is located in the Nottinghamshire part of the wider project area and similarly development schemes in the pipeline are deemed more likely to move forward in Nottinghamshire.

Unsurprisingly, there is a concentration of supply of serviced accommodation in the main urban centres of Nottingham, Derby and to a lesser extent Chesterfield and the majority are mainly business tourism focussed.

The D2N2 Visitor accommodation strategy highlights the difference in existing supply by district and Bolsover has just 6 hotel establishments with a bias toward urban locations.

Clearly Nottinghamshire benefits from its association with Sherwood Forest and while Derbyshire extends into the Peak District, other parts of the county lack a distinctive identity for tourism.

We have also assessed the provision within a ten-mile radius of Pleasley (i.e. not just by local authority boundaries). This shows that there are four budget hotels (within 5 miles), six three-star establishments and seven luxury operations. (Please see table as Appendix 1).

The budget hotels include the Travelodge and Central Hotel in Sutton in Ashfield. Whilst these hotels are business focussed in the midweek period they do add to the supply for holiday / leisure tourist bed capacity at weekends.

The VSCR concludes there has been 'clear market failure in terms of getting visitor accommodation development projects off the ground.'

### 6.2.2 Self-catering

The VSCR report highlights the fact that its two key target audiences of active adults and family friendly are more likely to be suited to self-catering accommodation use (more flexibility and lower price bracket). The level of provision is dominated by the 900 unit, Center Parcs at Sherwood although this tends to be an inward facing holiday site and guests are not encouraged to explore the wider area.

Other major provision includes the Forest Holidays cabin site (also at Sherwood) which has 82 detached units and Fairview Farm Log Cabins which offers 13 units. Evidently there is



substantial provision further afield most notably in and surrounding the Peak District National Park

In addition, there are 13 singular self-catering cottages within 15 miles of Pleasley Hub (NG19 7PH).

### 6.2.3 Visitor attractions (excluding the 3 main hubs)

There is a broad range of attractions within easy reach of Pleasley Hub outside the 3 main hubs for this project. Stainsby Mill sits alongside Hardwick Hall and in addition there is a reasonably strong heritage product (Mansfield, Chesterfield and Creswell Crags museums, several art galleries (The Harley Gallery and Chesterfield Art Gallery) as well as Bolsover Castle and Newstead Abbey.

There is a range of arts and cultural sites and in addition there are activity-based attractions at Sherwood Forest Fun Park, Sherwood Forest Railway and Go Ape in Sherwood Pines.

### 6.2.4 Nature reserves and wildlife sites

The area is blessed with a broad and extensive range of wildlife sites including nature reserves and country parks.

Within a ten-mile radius of Pleasley hub there are at least 15 recognised sites ranging from Kings Mill Reservoir to Brierley Forest Park a number of country parks and Sherwood Forest Nature Reserve (Please see table as Appendix 2).

This existing provision of existing sites of nature interest represents a key strength alongside the wider tourism offer of the VSCR destination.

### 6.2.5 Activity based sites

Whilst there is limited provision within the area the wider region has extensive activity operations, most notably in the Peak District National Park

Apart from the PVOAC which is considered separately in Section 5, the area boasts the Mill Adventure Base at Kings Mill Reservoir and a range of activities at Sherwood Pines.

There is also the Walesby Forest Activity Centre which has more than 140 bed space capacity and operates as an outdoor activity centre just outside the study area in Newark & Sherwood.

In addition, there are major plans for the Peak Resort at Unstone, near Chesterfield as highlighted in the earlier reports and as part of the wider project it is proposed to include David Lloyd's new activity-based concept Adrenaline World, Chesterfield as phase one delivery (of the wider Peak Resort). The application which has been submitted for consideration by the council is for an indoor activity centre including zip lines, climbing walls, caving, ninja course, trampolining, rope courses, fun walls, adventure golf and e-karts.

A little further afield is the proposal for a new Gulliver's World, close to Rother Valley Country Park near to the M1 between Sheffield and Rotherham.

#### 6.2.6 Pubs, restaurants and cafes

Our research shows there are some 39 pubs within 10 miles. A number have private functions for social events but only two offer overnight accommodation (The Jug and Glass at Never Langwith and The Shoulder at Hardstoft). Rooms in pubs represent a popular market for leisure visitors and this could present an opportunity to expand available bedstock in the area.

There are many restaurants in the wider area in addition to the pubs and inns. There are more than 30 listed restaurants within 5 miles (with a concentration in and around Mansfield including a number of national chain outlets (including Frankie and Benny's, Chiquito, Bella Italia (although these groups have had recent trading issues nationally)). In addition, there is a broad spectrum of cafes with more than 20 establishments within 5 miles, again with a concentration close to Mansfield.

#### 6.2.7 Camping and caravanning

There are two campsites and one glamping site registered in Bolsover District (as confirmed in the 2017 Accommodation study) and the parallel study by da landscapes will provide an update on this position.

The VSCR area includes the high quality Teversal Camping & Caravanning park which offers a variety of accommodation options. The site offers 126 pitches, three safari tents, a camping cabin and a caravan holiday homes.

In addition, within the wider area Clumber Park Caravan Club Site provides 178 pitches and Sherwood Forest Holiday Park has a further 200 pitches.

### 6.2.8 Walking and cycling

The area boasts an extensive range of footpaths and cycleways including most notably the Phoenix Greenways and the Archaeological Way, the Dukeries Trail, The Cuckoo Way, the Trans-Pennine Trail (with the Chesterfield Spur), NCN6 (which links Rother Valley Country Park to Newstead Abbey) and the Robin Hood Way. One of the issues at present is the shortage of routes which are easily accessible loops, some key gaps in the network and the current lack of so called 'hero routes'.

The parallel study by Aecom will present the current situation in detail and present priority new route development. It is important to note that improvements have been made and further developments are already underway to improve linkages.

#### Summary

From the 'population data' a number of implications can be drawn out which impact on the development of the Pleasley Hub tourist destination (which provide facilities / services) for both visitors and members of the local community alike:

- The overall headline population figures for the one and two-hour drivetime contours are very positive. There is a large target marketplace to service the 'destination', but there are some challenges in extending the 'reach' of Pleasley to attract visitors from outside the immediate catchment.
- The demographic analysis does highlight that there are some significant pockets of deprivation in and close to the immediate study area, which impacts on affordability, spend levels and consequently product development opportunities (particularly for local residents)
- The socio-economic profile shows a lower representation of Abs across all three drivetime contours. This group has the highest disposable income for leisure and tourism activities and has the highest propensity to take short breaks.
- It is important to recognise that cycling, a key focus of this commission, can be a relatively expensive leisure activity to take part in (purchasing a bike, equipment and clothing) and the socio-demographic structure of the residential population (and their associated level of consumer spending power) does have clear product implications
- Looking to the longer term, the overall size of the residential market place is set to increase with positive population growth being forecast in England

## 7. Case Examples

Cycling continues to grow in popularity and many areas of the UK are targeting the cycle market with products and enhanced facilities to attract visitors. Cycle tourism is defined as recreational visits either overnight or day visits away from home, which involve leisure cycling as a fundamental and significant part of the visit. Holidays and day trips by cycle are often categorised as a sustainable tourism product.

Within this section, we consider a number of examples of successful cycle tourism product developments throughout the UK – destination areas, cycle hubs and products. Within the examples, we outline some of the key lessons for Pleasley Visitor Hub in terms of moving forward.

Bike Park Wales <a href="https://www.bikeparkwales.com/">https://www.bikeparkwales.com/</a>	
<b>Location</b>	Bike Park Wales (BPW) is set in forestry land, Gethin Woodlands, just south of Merthyr Tydfil, South Wales on the A470 trunk route between Cardiff and Brecon.
<b>Product offer / visitor facilities</b>	<p>The offer is based on the mountain bike equivalent of a ski resort:</p> <ul style="list-style-type: none"> <li>• Dedicated uplift (with self-propelled alternative)</li> <li>• Variety of downhill runs at various grades of difficulty</li> <li>• Hire/ retail of bikes and other equipment</li> <li>• Repair and wash-down facilities</li> <li>• Café</li> <li>• Events programme</li> <li>• Training/ Coaching programme</li> </ul> <p>New trails are in development and there are aspirations to develop accommodation on site and extend the brand to new locations in due course</p>
<b>Links</b>	BPW works with other mountain bike centres across Wales to jointly promote the national offer through MBWales <a href="http://www.mbwales.com/">http://www.mbwales.com/</a> . The development of BPW led to the creation of 8 new accommodation businesses (B+B and S/C) near the site. The site is close to the South Wales Metro

	rail-line, the (off-road) Taff Trail and the wider Valleys Cycle network.
Management	BPW is a fully private sector company with directors who are mountain bikers themselves and understand the market. The business model allows for dedicated trail maintenance and re-investment. All users pay to access the trails whether or not they use the uplift service.
Investment	The land is in public ownership, in the care of Natural Resources Wales (who own and operate their own MB centres elsewhere in Wales). BPW has a lease on the land. The original investment (c£3m) was split between public and private sector, but with all commercial elements funded by BPW. All re-investment will be via BPW's profits.
Market	The market is very specific – downhill mountain biking enthusiasts, usually young adults, from the M4/M5 corridors. There is very little crossover with other cycling markets.
Key lessons	<ul style="list-style-type: none"> <li>• Continuous investment in developing the mountain bike product</li> <li>• There are innovative ways to engage private sector investment in cycling infrastructure which traditionally falls to the public sector</li> <li>• Well-marketed and well-presented facilities will stimulate secondary investment by the private sector in accommodation and hospitality</li> <li>• Cycling market segments do not necessarily mix – each has specific requirements/ expectations</li> </ul>

**Carmarthenshire – ‘Cycling Hub of Wales’**

<http://democracy.carmarthenshire.gov.wales/documents/s23075/Carmarthenshire%20Cycling%20Strategy.pdf>

Location	Carmarthenshire is both a unitary authority area and an ‘official’ tourism destination in West Wales. It has a number of historic market towns, post-industrial settlements and a
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	<p>varied rural landscape with coast, countryside and uplands, including part of the Brecon Beacons national park. It is home to a number of nationally renowned gardens, country houses and castles – so previous tourism promotion has centred on a traditional family offer at the coast and heritage and walking in the rest of the county.</p> <p>Two NCN routes cross the county 4 (Celtic Trail) and 47. In 2018 the County launched a comprehensive Cycling Strategy, linked to Welsh Government Active Travel funds and policies to put cycling, as a differentiator, at the heart of its lifestyle offer - first for the local population and then visitors to the destination – based on 5 themes: Infrastructure &amp; Facilities (i.e. ‘hard’ development), Education Training &amp; Development (‘soft’), Events, Tourism, Marketing &amp; Branding.</p>
<p>Product offer / visitor facilities</p>	<p>The county offers a mix of mountain bike (forest track), family friendly (off-road) and enthusiast/ challenge waymarked routes.</p> <p>There has also been significant investment in cycling development locally with a refurbished 1900 velodrome in Carmarthen and training facilities, linked to participation programmes from beginners through to elite. A major catalyst was bidding for and seeking a legacy from hosting a stage of the Tour of Britain.</p> <p>Pembrey Country Park represents a ‘hub within a hub’ with a new closed road circuit for cycle racing, cycle hire, accommodation, hospitality and access to the NCN 4 Celtic Trail and Wales Coast Path which pass through the site.</p>
<p>Links</p>	<p>The Celtic Trail links Carmarthenshire with Swansea/ Gower to the east and Pembrokeshire to the west. A toolkit for tourism operators is promoted through the Carmarthenshire Tourism Association.</p>

<b>Management</b>	<p>The County Council is the key driver for the strategy but the lead is from leisure/ health rather than tourism or transport.</p>
<b>Investment</b>	<p>Through the strategy £10m has been invested in 'hardware' including the velodrome, closed road circuit and completing the Tywi trail as well as investment in cycling development, events, industry engagement and marketing.</p>
<b>Market</b>	<p>The tourism market is based on the Visit Wales 'Active Explorers' profiles especially 'Family Explorers' and 'Pre-family Explorers'. This has extended the county's appeal as the rural product has thus far appealed to (older) 'Cultural Explorers'.</p>
<b>Key lessons</b>	<ul style="list-style-type: none"> <li>• Cycle tourism is part of a much broader cycling strategy for the destination</li> <li>• Tourism adds value to local participation for well-being purposes rather than the other way round</li> <li>• LA has provided leadership but a broad alliance of interests has been engaged</li> <li>• Events can be used strategically to underpin wider development and investment</li> <li>• Cycling has attracted new market segments to Carmarthenshire</li> </ul>

### Hassop Station, Monsal Trail

<b>Location</b>	<p>Hassop Station and café located on the Monsal Trail, Bakewell, in the centre of the Peak District National Park, which is one of three trails managed and maintained by the Park Authority. The Monsal Trail runs along the former Midland Railway line, starting north of Bakewell, 10 miles north of Matlock and 8 miles west of Chesterfield in Derbyshire.</p>
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	Hassop Station is a large former railway station on the B6002, which after extensive renovation reopened in 2011 as a café, book & gift shop and cycle hire centre.
Product offer / visitor facilities	Hassop Station is located directly on the Monsal Trail, a traffic-free route for walkers, cyclists, horse riders and wheelchair users. Specific visitor facilities include: <ul style="list-style-type: none"> <li>• Café and function room (open 9-5 362 days of the year)</li> <li>• Book shop</li> <li>• Gift shop</li> <li>• Information point</li> <li>• Monsal Trail Cycle &amp; eBike hire</li> <li>• Bike cleaning and storage space</li> <li>• Large car park</li> </ul>
Links	Hassop Station and the Monsal Trail is situated close to Bakewell (1.7 miles) within the Chatsworth Estate and is within easy reach of a range of visitor attractions: Monsal Trail Tunnels (0.5miles); Chatsworth House (3 miles); Monsal Viaduct (2 miles) Haddon Hall (10 miles)
Management	The former train station is owned by Hassop Station Ltd. The trail is owned and maintained by the Peak District National Park Authority.
Investment	The station has benefitted from a range of funding, including a LEADER grant to re-develop a former building for bike hire. The entire project cost £2.25 million. The Peak District National Park Authority received £2.25 million funding from the Department of Transport to re-open the Monsal Trail in December 2009.
Market	The Monsal Trail attracts a range of users specifically: <ul style="list-style-type: none"> <li>• Active adults</li> <li>• Family market (particularly around the ‘honeypots’, e.g. the viaduct, Hassop Station)</li> <li>• Events</li> </ul>



	The café is particularly popular with day visitors as it offers a quality product (which is seen through very positive TripAdvisor reviews).
Key lessons	<ul style="list-style-type: none"> <li>• Benefits from being located in the Peak District and close to a number of ‘honeypot’ destinations</li> <li>• Partner commitment to grow and develop cycle tourism</li> <li>• Committed and enterprising management team</li> <li>• Range of business opportunities created on the estate (e.g. eBikes, which are proving extremely popular))</li> <li>• Quality product</li> </ul>

### Hicks Lodge – National Forest Cycle Centre

Location	Hicks Lodge is located to the south west of Ashby de la Zouch within the National Forest, which is an emerging tourist destination. The site is between junctions 11 and 12 on the M42/A42.
Product offer / visitor facilities	<p>The core visitor offer includes:</p> <ul style="list-style-type: none"> <li>• 1 walking trail</li> <li>• 2 cycling trails</li> <li>• 1 seasonal horse-riding trail</li> <li>• Play area</li> <li>• Bike hire</li> <li>• Café</li> <li>• Picnic area</li> <li>• Car parking – with respective charges</li> </ul> <p>Importantly, dogs are welcome and the site covers approximately 150 acres. The centre offers a gentle introduction to mountain biking, with a family focus.</p>

<p><b>Links</b></p>	<p>Links through to wider network of trails across the National Forest and local housing.</p>
<p><b>Management</b></p>	<p>The site is now managed by Forestry England. This has a number of advantages including national brand awareness, national marketing reach and a track record of delivering a high-quality experience across a network of recreation sites. This is coupled with an extensive national staff resource and access to capital funding.</p> <p>The café is managed by a private sector operator, which also manages an additional five cafes across different sites. Originally, the site was tendered and a private sector company was responsible for managing the site.</p>
<p><b>Investment</b></p>	<p>Phased development – second phase approximately £1.5m included a café, 100 space car park and just under 14km of off-road trails.</p> <p>The project was funded by 6Cs Strategic Green Infrastructure Growth Fund and the Leicester and Leicestershire Enterprise Partnership.</p>
<p><b>Market</b></p>	<p>Estimated 150,000 users<sup>7</sup>.</p> <p>Forestry England commissioned research to assess the quality of the visitor experience at the forest sites which they manage. The last research completed for Hicks Lodge was in 2012 and the findings are combined with those for Rosliston Forestry Centre (a site within the National Forest). Summary results include:</p> <ul style="list-style-type: none"> <li>• 41% of visitors (excluding first time visitors) visited at least weekly (emphasising the importance of the local marketplace)</li> </ul>

<sup>7</sup> The National Forest Company, The National Forest - Situation Report and Taking Shape A Report January 2015

	<ul style="list-style-type: none"> <li>• 93% of visitors were visiting as part of a day trip of less than 3 hours away from home</li> <li>• 63% of visitors were from the 'family bracket'<sup>8</sup></li> </ul>
<p>Key lessons</p>	<ul style="list-style-type: none"> <li>• Part of a long-term development plan for the National Forest. Previous phases include: The Heart of the National Forest Visitor Centre, CONKERS, YHA hostel, developing and promoting the National Forest brand</li> <li>• Site has been developed over different phases</li> <li>• Benefits from growing awareness of wider National Forest as an emerging tourist destination</li> <li>• Now managed by the Forestry England (which brings with it a positive cachet and brand awareness)</li> </ul>

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<sup>8</sup> Quality of Visitor Experience Survey: Rosliston and Hicks Lodge, March 2013

## 8. Summary Assessment

A key component of the Visit. Sleep. Cycle. Repeat. Destination Plan is the development of cycling-led hubs to make cycling opportunities more visible to visitors, create a stronger visitor destination and enable and encourage visitors to go cycling. The Pleasley Visitor Hub was identified within the Destination Plan as one of the three hubs where growth should be targeted.

The focus of our Stage 1 work has been to identify, review and assess the visitor product in and around Pleasley and to test and challenge the Visitor Hub proposition and identify future requirements – in terms of product gaps, marketing and promotion and support infrastructure – necessary to realise this potential.

The table overleaf (pages 53 and 54) presents a SWOT summary of the Pleasley Visitor Hub concept. Since the start of the audit and assessment phase, and along with all other discretionary areas of the economy, the UK travel and tourism industry are now facing an unprecedented crisis due to the impact of COVID-19, which has seen the visitor economy abruptly shut down. These are challenging times for many businesses, with the ‘lockdown’ putting a stop to all international and domestic visitors, both ‘stay’ and ‘day’. It is early days, but more and more attention is being given to how best to engineer a recovery, against the likely backdrop of an imminent worldwide recession. It would not be a surprising market reaction, certainly in late 2020 and early 2021, at least until a vaccine is ubiquitous, for any travel plans to be short term, last minute, tentative and close to home, with quiet and uncrowded destinations preferred. It is interesting to note that the 2008 Financial Crisis was in fact a key driver to the growth for the staycation market; indeed, there was a 19% uplift in domestic travel in 2009. The key will be to have strong destination management, which serves and communicates well with both businesses and local communities. Keeping close to the DMPs and building the evidence base for enhancing the visitor product in Pleasley will be important. Simple, trusted and safe activities, backed by affordable and well-timed offers will be the key.

Thus the other themes which are likely to be important in terms of benefitting from the uplift in domestic tourism market could include a call for places / ideas that might be a bit different and less well known and less crowded as well as active, outdoor experiences (all of which fit within the visitor hub opportunity). There is also talk of the need to rebalance the visitor economy away from its focus on ever-growing visitor numbers and tourism receipts towards a more community- centric recovery, which fits with our suggested emphasis on ‘slow-tourism’ as a driver for Pleasley.

Our next phase of work will need to focus on actions to reset and drive recovery of the sector and set in motion practical steps to ensure that tourism businesses are ready and able to welcome international and domestic visitors back.

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• Good road connectivity particularly the M1 and A60, which connect the area by road north and south</li> <li>• Good access to large population centres</li> <li>• Overall headline population figures for the one and two-hour drivetime contours are very positive</li> <li>• Existing tourism product – natural and built heritage</li> <li>• Hardwick Hall is the ‘jewel in the crown’</li> <li>• Existing trail network, including the Archaeological Way and Phoenix Greenways</li> <li>• Public and private <b>investment</b> in developing the visitor product</li> </ul>	<ul style="list-style-type: none"> <li>• Not identified as being a tourism destination</li> <li>• By-passed because of geography and the immediate appeal of the neighbouring Peak District and Sherwood brands</li> <li>• Overall visitor support infrastructure is immature</li> <li>• Lack of (quality) serviced accommodation</li> <li>• Lack of identity and brand recognition</li> <li>• Primary thematic appeal of the area is in the ‘big name’ brands and attractions – Hardwick Hall, Creswell Crags, Bolsover Castle - rather than the (comparatively) under-developed cycling/activities product</li> <li>• Lack of a ‘pay-as-you-go’ activity offer at PVOAC</li> <li>• Some significant pockets of deprivation in and close to the immediate study area, which impacts on affordability, spend levels and consequently product development opportunities</li> <li>• Lack of understanding and awareness as to the hub proposition by some stakeholders</li> </ul>

Opportunities	Threats
<ul style="list-style-type: none"> <li>• Strong policy agenda</li> <li>• Overall size of the residential market place set to increase; positive population growth forecasted</li> <li>• Growth of cycling/ walking product development</li> <li>• Although surrounded by truly world-class destinations in the Peak District and Sherwood Forest, the VSCR area has the potential, as the 'hole in the donut', to bring these two iconic destinations together'</li> <li>• Opportunity to build a brand around responsible tourism and a drive to increase the amount of time people spend in the area</li> <li>• Swathes of green spaces many reclaimed from former pits</li> <li>• Pleasley Visitor Hub proposal has the potential to contribute towards economic, social and environmental outcomes</li> <li>• Providing cycling and walking facilities for visitors will also benefit local residents and help improve health outcomes</li> <li>• Investment at Pleasley Pit</li> <li>• Commitment of NT at Hardwick Hall for the attraction to be outward facing</li> <li>• 'Pay-as-you-go' product at Pleasley Vale Outdoor Activity Centre</li> <li>• Establishment of the Visitor Economy Consortium (VEC) demonstrates a commitment to assess the scope and scale of the opportunity</li> </ul>	<ul style="list-style-type: none"> <li>• COVID-19 crisis</li> <li>• Not seen as a priority visitor destination by Destination Management Organisations</li> <li>• Number of more mature destinations are targeting the cycle market with products and enhanced facilities to attract visitors</li> <li>• Lack of public funding to drive forward destination development (specifically trail development and addressing investment requirements at PVOAC)</li> <li>• Failure to develop and /or obtain buy-in for a new common brand for the area which resonates with the visitor marketplace</li> <li>• Not securing private sector operator interest to develop/manage cycling hub</li> <li>• Not securing ongoing marketing budget to promote the offer to the marketplace</li> </ul>

In terms of the wider regional visitor economy, the Pleasley hub is, in many respects, is part of the VSCR 'hole in the doughnut', surrounded by the truly world-class destinations in the Peak District and Sherwood Forest, where pressures are more around managing tourism flows than attracting more visitors. Analysis of the national, regional, destination and local strategic context shows significant policy alignment and ongoing support for the visitor economy overall and cycle-based tourism as a major theme in particular. What is clear, however, is that the opportunity at Pleasley is currently being by-passed not least because of its location / geography and the immediate appeal of the neighbouring destination brands.

The issue that this report attempts to address, is whether the Pleasley area can provide a visitor product, based on the twin assets of cycling and its heritage, to complement the wider regional offer and warrant public investment.

In terms of **product**, the audit and assessment shows that Pleasley looks to have a number of key ingredients in place to become a hub for tourism cycling:

- It is a key location on the cycling trails network, which is accessible and well-connected<sup>9</sup>
- Its central location means it is within easy reach on foot, by bike and by car from many of the project area's heritage attractions including Hardwick Hall, Creswell Crags and the Welbeck Estate
- The Outdoor Activity Centre, located at Pleasley Vale, could add to the appeal of the site for Fun Families and Active Adults
- The natural and built heritage of the area adds to the visitor experience and provides an opportunity to tell the story of Pleasley
- It will open up the wider area as a destination - introducing the environment to more visitors including the extensive network of ancient woodlands, riverine habitat, open pasture and limestone gorges
- It will help unlock VSCR, and as the 'hole in the donut' between the Peak District and Sherwood, it would bring these two iconic destinations together

Hardwick Hall is the 'jewel in the crown' in terms of attractions in the region and the commitment of the National Trust to the Pleasley Visitor Hub concept is a major plus for the hub concept. However, the audit shows some deficiencies in terms of the visitor product. There is limited serviced accommodation and a lack of cycle-friendly accommodation and hospitality outlets. The VSCR concludes there has been 'clear market failure in terms of getting visitor accommodation development projects off the ground.' The overall visitor

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<sup>9</sup> The outcome of the Aecom study will provide important information on the quality of the cycling network in the area

support infrastructure is immature particularly compared to the Peak District and Sherwood Forest brands.

The **market** analysis shows a strong demographic catchment within the immediate core 30-minute drivetime contour and the one-hour profile, where the population increases to just over a 3.75 million residents (3,767,036), which represents a high base for leisure and tourism uses. However, the one-hour and two-hour drivetime catchments increase leisure and recreation competition for day and staying visitors. The demographic analysis does highlight that there are some significant pockets of deprivation in and close to the immediate study area, which impacts on affordability, spend levels and consequently product development opportunities (particularly for local residents).

In terms of the market, the Pleasley area does lack identity and a defined 'narrative' that draws and presents an attractive proposition and reason to visit the area. It will be important for the area to build a linked brand, which will give value to the destination, so that tourists or travellers are able to recognise and share the brand identity. One opportunity may be to build a brand around responsible tourism and a drive to increase the amount of time people spend in the area. "Slow tourism" is becoming increasingly important, encouraging travel at a reduced pace that is sustainable and responsible, and fits well within the overall focus of cycle tourism. It also complements the wider regional offer to distribute time and spend across smaller and peripheral attractions and communities.

There continues to be public and private **investment** in developing the visitor product in the area, particularly at Hardwick Hall and the emerging visitor centre at Pleasley Pit and Country Park. Clearly, over the short-medium term, COVID-19 is having a devastating impact on markets, destinations, organisations and businesses, consumers, destination communities and tourism transport. The immediate investment priority will be to review, reset and support enterprises survive this challenging time. The outcome of the Aecom work will be critical in terms of identifying gaps and deficiencies in the trails network and well as reviewing signage and waymarking.

The Pleasley Vale Outdoor Activity Centre is well placed to be an important facility within the Pleasley Visitor hub. However, the current lack of a 'pay-as-you-go' activity offer is a big issue in terms of the centre becoming a must-see experience and becoming a major draw within the Pleasley hub. The future of the facility and understanding the commitment of the Council to enhance and support future investment in the Outdoor Activity Centre will be important in defining its future role within the hub. The outcome of the planned feasibility study work commissioned by BDC is vital to assess and develop the potential of the Outdoor Activity Centre.

The next stage will need to consider the services, facilities and investment required to develop cycle hubs across the region with an initial focus on Pleasley Pit and Hardwick Hall as models to explore the physical facilities required.



For some visitors, **events** provide a reason to visit – sometimes just for the day, but some generate overnight stays not only for participants, but also their family supporters, providing further economic benefit to the area. It will be important to assess whether any of the current cycle routes (or planned extensions) could be branded as ‘hero’ cycling routes, where permanent signage could help to improve the offer. Such features will enhance the routes and create more memorable experiences. Events also provide useful content for promotional activity. Sportive events, specifically those with a charity theme, remain popular and the region is well placed as a venue for a number of them to be held throughout the year. There may be scope to do more with family events. Further work is required to explore whether an event series could be developed working with local cycling clubs and event organisers that will attract visiting cyclists.

The assessment perhaps demonstrates that the **geographic scope and coverage** of the proposed hub needs to have fluid boundaries to reflect the various destination product elements which resonate with the visitor. This will also need to be reflected in terms of future branding and marketing. It will be particularly important that the visitor hub connects via the wider network of routes and trails through routes including the Phoenix Greenways and the Archaeological Way.

The establishment of the Visitor Economy Consortium (VEC) demonstrates a commitment to assess the scope and scale of the opportunity. However, our discussions with key partners and stakeholders show a lack of understanding and awareness as to the hubs proposition. Currently, the programme is being driven forward by Derbyshire County Council. It will be important to further engage with the VEC to understand the level of commitment and support for the initiative and how it links with their plans and proposals to enhance the visitor offer and develop the cycling offer in the area.

In summary, the next steps will include:

- Meeting with/ feedback from Steering Group (and wider VEC) to consider conclusions and way forward
- Assimilation of interim findings from other consultancy workstreams to inform investment and marketing priorities
- Develop proposals for options appraisal process

## Appendix 1: Accommodation

### Serviced accommodation (within 10 miles)

Name	Number of Rooms	Location	Distance from NG19 7PH
<b>Budget</b>			
The Clifton Hotel	12	11 Terrace Rd, Mansfield NG18 2BP	3.9 miles
The Pop Inn	5 rooms	25 Newgate Ln, Mansfield NG18 2LB	3.9 miles
Travelodge	No information on number of rooms	Mansfield Rd, Sutton- in-Ashfield NG17 4HG	4.3 miles
Central Hotel	28 rooms	1 Station Rd, Sutton- in-Ashfield NG17 5FF	4.4 miles
<b>3-Star</b>			
Mansfield Lodge Hotel	18 rooms	27-28 Woodhouse Rd, Mansfield NG18 2AF	3.6 miles
Mansfield Manor	11 rooms	Carr Bank Park, Windmill Ln, Mansfield NG18 2AL	3.8 miles
The Midland Hotel	28 rooms	Station Rd, Mansfield NG18 1LP	3.8 miles
Twin Oaks Hotel	36	Church Ln, Ramcroft, Chesterfield S44 6UZ	4.3 miles
281 Restaurant and Rooms	19 rooms	283 Nottingham Rd, Mansfield NG18 4SE	5.2 miles
Premier Inn Mansfield hotel	69 rooms	Carter Ln E, South Normanton, Alfreton DE55 2EY	9.8 miles
<b>Luxury</b>			
-Appleby Guest House	6 rooms	Chesterfield Rd, Pleasley, New Houghton, Mansfield NG19 7PF	1 mile
Bridleways Guest House & Holiday Homes	The guest house: 9 bedrooms	Newlands Rd, Forest Town, Mansfield NG19 0HU	6.4 miles

	Ploughman's Cottage: 2 bedrooms Holiday homes: 2 caravans each with 2 bedrooms.		
Redbrick House	10 rooms	Peafield Ln, Mansfield, Nottinghamshire, NG20 0EW	7.2 miles
Holiday Inn South Normanton	163 rooms.	Carter Ln E, South Normanton, Alfreton DE55 2EH	8 miles
Mour hotel	92 rooms.	Sherwood Business Park, Lake View Dr, Nottingham NG15 0EA	9.5 miles
Forest Lodge hotel	12 rooms.	Church St, Edwinstowe, Mansfield NG21 9QA	9.5 miles
Eastwood Hall	150 rooms.	Mansfield Rd, Eastwood, Nottingham NG16 3SS	10.1 miles

**Self-catering accommodation sites (5 or more units) including lodges and chalets within 10 miles**

<b>Name</b>	<b>Number of units</b>	<b>Location</b>	<b>Distance from NG19 7PH</b>
Cabins at Sherwood Forest	82	46 Nottingham Rd, Mansfield NG18 1BL	4.1 miles
Fairview Farm Log Cabins & Holiday Accommodation	13	Fairview Farm, Main Rd, Nottingham NG15 9GS	10 miles

## Appendix 2: Nature and wildlife sites

(within 10 miles)

Name	Brief description	Location	Distance from NG19 7PH
Pleasley Pit Country Park and Local Nature Reserve	The Pleasley Pit Country Park is a reclaimed colliery site. It is now a nature reserve with a diverse variety of wildlife and natural habitats. Guided walk programs are regular organised by the Pleasley Pit Nature Study Group. Facilities include public toilets, free parking and disabled access. Dogs allowed.	Pit Lane, Pleasley, Mansfield, NG19 7PF	0.6 miles
Silverhill Wood	Park with surfaced woodland trails and home to a wide variety of wildlife including grass snakes and orchid. Public car park on site.	Silverhill Lane, Sutton-in-Ashfield, NG17 3JL	3.4 miles
Kings Mill Reservoir	Site covers 31.8ha and includes a lake, marshy reed bed, grassland and the River Maun runs through it. Home to a variety of wildlife and especially popular for bird watching with 219 different bird species currently recorded.	Sutton in Ashford, NG17 4PA	4.3 miles
Oakham Nature Reserve	6.3-hectare nature reserve created in 2005 to replace the habitats lost by the construction of Oakham Business Park.	Oakham Nature Reserve, Mansfield, Nottingham, NG18 5BR	4.8 miles
Carr Vale Nature Reserve	12-hectare wetland reserve formed of a mixture of open water, marsh, wet and dry grassland, scrub and trees. Home to a large variety of wildlife with many different habitats.	Riverside Way, Bolsover, Chesterfield, S44 6GA	5.8 miles
Williamthorpe Nature Reserve	Nature reserve consisting of ponds, reed beds and woodland. Cycle and horse-riding tracks, footpaths, parking, wildlife area and disabled access on site.	Chesterfield, Derbyshire, S42 5UT	5.8 miles
Peter Fidler Nature Reserve	Nature reserve made up of woodland, grassland and wetlands and home to a wide range of habitats and wildlife. Viewing platforms over reed beds. Reed and sedge warblers have been flown from Africa to breed at this nature reserve.	Riverside Way, Bolsover, Chesterfield, S44 6BS	6 miles

	Facilities include parking, footpath, cycle path, wildlife area and horse-riding trail.		
Brierley Forest Park	Brierley Forest Park has been transformed from a former colliery site into a wildlife haven with nature walks covering over two miles. Park facilities including a football pitch, children's play area, sculpture trail and a visitor centre. Wetland areas have been created and wildflower meadows have been sown.	Skegby Road, Sutton in Ashfield NG17 2PL	6.2 miles
Rookery Park	Park restored from a landfill site into a landscape of woodlands, wetlands and grasslands and is now a popular walking and wildlife viewing area.	Sutton in Ashfield, NG17 2SJ	6.3 miles
Vicar Water Country Park	78-hectare, Green Flag award winning green space. Toilets, visitor centre and café on site. Home to a variety of wildlife and popular among nature watchers.	Mansfield Road, Clipstone, Mansfield NG21 9AA	6.6 miles
Grassmoore Country Park	Park home to a variety of wildlife including the endangered water vole. Parks consists of ponds, meadows and grassland. Free parking on site. Mostly ground level with tracks for easier access.	Birkin Lane, Grassmoor, Chesterfield, Derbyshire, S42 5BP	7 miles
Creswell Crags	Creswell Crags in North Nottinghamshire is a limestone gorge with caves and ancient history, also home to a variety of rare wildlife species. Museum on site and cave tours available to book.	Crags Rd Welbeck, Worksop S80 3LH	9.3 miles
Poolsbrook Country Park	Popular site for Nature watching and walking. The park is home to a wide range of bird species and consist of woodlands, meadows and lakes. Trails for walking and cycling and children's playground on site.	Poolsbrook Country Park Pavillion Pavilion Drive Poolsbrook, Staveley S43 3WL	9.3 miles
The Avenue Washlands Reserve	This wetland reserve consists of reedbed, marsh, ponds and grassland in the valley of the River Rother. The habitat was created in 2005 and a large variety of wildlife has been attracted which has added to the species that were already established on site. Visitor centre, bird hides and picnic area on site.	9 Mill Ln, Wingerworth, Chesterfield S42 6FQ	9.7 miles

Queen's Park	Since its opening in 1887, the park has been restored with a lake, café, miniature railway and playground. The lake is home to ducks and geese.	Boythorpe Road, Chesterfield, Derbyshire, S40 2ND	9.8 miles
Sherwood Forest Nature Reserve	420 hectares of woodland, home to a variety of wildlife species and habitats. Visitor centre on site, opened in 2018 and run by Nottinghamshire County Council.	Forest corner, Edwinstowe, Nottinghamshire, NG21 9RN	9.8 miles

## Appendix 3 Visitor attractions

(within 10 miles)

<b>Name</b>	<b>Brief description</b>	<b>Location</b>	<b>Distance from NG19 7PH</b>
Mansfield Museum	Local museum run by the council in Mansfield with a diverse mix of collections.	Leeming St, Mansfield NG18 1NG	1.6 miles
Stainsby Mill (National Trust - Hardwick Estate)	Stainsby Mill is a tourist attraction and National Trust property. Volunteers are on hand inform visitors of Hardwick's past and present millers and visitors can buy bags of freshly milled Stainsby flour.	Mill Ln, Chesterfield S44 5RW	4.1 miles
Water Meadows Swimming and Fitness Complex	Water park and fitness centre.	Titchfield Park, Bath St, Mansfield NG18 1BA	4.2 miles
Bolsover Castle	17 <sup>th</sup> century castle in Chesterfield with discovery centre, scenic grounds and a cafe.	Castle St, Bolsover, Chesterfield S44 6PR	5.2 miles
Sherwood Forest Railway	The Sherwood Forest Railway is a 15 in gauge light railway running through the old site of the Sherwood Forest Farm Park in Nottinghamshire and is open to visitors.	Lamb Pens Lane, Edwinstowe NG21 9HL	7.6 miles
Creswell Crags Museum and Heritage Centre	Magnesian limestone gorge on the border between Derbyshire and Nottinghamshire	Crags Rd, Creswell, Worksop S80 3LH	9.3 miles

	with a museum, visitor centre and tours available to visitors.		
Chesterfield Museum and Art Gallery	Local museum and art gallery, the museum tells the story of the history of Chesterfield and the art gallery has a variety of exhibitions.	St Mary's Gate, Chesterfield S41 7TD	9.3 miles
The Harley Gallery	Art museum and educational charity with a variety of exhibitions.	Welbeck, Workshop, Nottinghamshire, S80 3LW	9.5 miles
Sherwood Forest Fun Park	Family fairground for all age groups. Rides and food stalls on site.	Swinecote Rd, Edwinstowe, Mansfield NG21 9QA	9.7 miles
Newstead Abbey	The ancestral home of 19 <sup>th</sup> Century English poet Lord Byron. House and gardens open to visitors.	Newstead Village NG15 8NA	10.3 miles
Go Ape Sherwood	Outdoor adventure tree-top activity chain. Go Ape Sherwood has 4 different activity courses to cater for all ages and abilities.	Sherwood Pines Forest Park, Sherwood Pines, Edwinstowe, Mansfield NG21 9JH	10.3 miles