

Greenway Strategy for South Derbyshire District

SECTION 3: The Market

3.1 Introduction

- 3.1.1 It is useful to identify the market available that would be able to access and benefit from the introduction of a Greenway network in South Derbyshire. It is also useful to assess the likely demand of these additional access routes. To do this, this chapter examines the existing demographics of the area, the ease for day and tourism based visits to reach the area and the reasons for the visits, or trip generators, likely to create a demand for the pathways.
- 3.1.2 The nature of the demand for a Greenway is often driven by supply. It has been found that prior to a route development, use and demand was negligible or zero, either because the ground conditions were so poor that access was restricted to the majority of users or that no route existed. By installing new routes it is possible to demonstrate a new usage and therefore the likely demand of additional routes in similar settings. The greatest demand or use of a route has usually been found to be where a number of different trip generators are recognised.

3.2 Demand Assessment

- 3.2.1 There was insufficient time to undertake a comprehensive market research study to assess the likely demand of individual routes and these might be established as each project develops. The assessment below therefore aims to establish that there is a potential demand for Greenways within the district based on current research and available statistics.
- 3.2.2 As covered in Section 2, it is clear from central and local government policy that there is a need to increase the accessibility of facilities and services for local markets and to improve the travel options available to reach places of work, education and learning centres, as well as local open space and amenities. These local trip generators are often arranged in clusters around the larger settlements. The mix of urban and rural character of South Derbyshire suggests that benefits would be gained by improving the connectivity of the smaller communities to the main service centres and thereby creating a local market for Greenway routes.
- 3.2.3 The 2001 Census data records the population of South Derbyshire as 81,562 and the neighbouring population of Derby City as 221,708. The East Derbyshire Greenway Strategy suggests that the greatest use of Greenways is from local markets within a thirty minute journey time from the destination. Whilst the population within the district is relatively small, the potential market

and therefore demand will also draw from the surrounding populations of Burton-on-Trent, Long Eaton, Nottingham, Ashby-de-la-Zouch and the smaller communities of North West Leicestershire and East Staffordshire. This creates a potentially very large local demand for a Greenway network in South Derbyshire.

- 3.2.4 Demand can also be assessed against the number and popularity of tourism or visitor based trip generators within the district, including the attractions, sites of interest, opportunity for single or dual activity short break or touring holidays, and the available tourist based accommodation and infrastructure.
- 3.2.5 With the growing tourism based initiatives in South Derbyshire, it is likely however that tourist based day visits to the district will draw on a wider market from across the East Midlands, with a population of over 4million.
- 3.2.3 The transport system into the East Midlands Region provides major road links (A50 & A52 through the Trent Valley, A38 & A42/M42 from Birmingham, M1 from Leeds and London), rail networks and the East Midlands Airport. The potential therefore for visitors from within and outside the East Midlands Region is substantial.
- 3.2.4 The National Statistics official UK data source show that short break holidays have also been found to draw custom from around the country as well as visits from overseas.
- 3.2.5 South Derbyshire has a mixed variety of visitor attractions from historic houses to distinctive craft shopping. The Trent and Mersey Canal, River Trent Navigation and the open water reservoirs provide a popular stream of water based activities and holiday opportunities. The gently undulating countryside and the developing National Forest also provide a wide range of activities and days out for all age ranges and abilities. A full list of visitor attractions in South Derbyshire can be seen in Box 3 below.

Box 3: Visitor Attractions in South Derbyshire

Woodlands & Countryside Activities

- Beehive Farm Woodland Lakes
- Rosliston Forestry Centre
- Swadlincote Woodlands Park
- Various National Forest Access Sites

Water Based Activities

- Foremark Reservoir Visitor Centre
- Staunton Harold Reservoir & Visitor Centre
- Trent & Mersey Canal
- River Trent Navigation & Marina Boat Trips

Heritage & Culture

- Measham Museum, Swadlincote
- Shardlow Heritage Centre, Salt Warehouse at Shardlow Canal Wharf
- Sharpes Pottery, 19th century works, Heritage & Arts Centre

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Box 3: Visitor attractions in South Derbyshire continued

Historic Houses & Gardens

- Calke Abbey & Park & National Nature Reserve
- Catton Hall
- Elvaston Castle & Country Park
- Melbourne Hall & Royal Gardens

Family Fun

- Highfields Farm Happy Hens, Etwall
- Swadlincote Ski & Snowboard Centre
- Safari Parties at Grangewood Zoo, Netherseal

Shopping & Crafts

- Ingleby Gallery
- Ferrers Centre for Arts & Crafts, Staunton Harold Hall
- Mason Cash & Co Ltd/T.G. Green Pottery Factory Shop, Church Gresley
- Bretby Nurseries

3.3 Disabled Users, Walking, Cycling & Horse Riding

3.3.1 The different user groups of Greenways should be considered to assess the likely markets for the proposed network. The markets for disabled users, walking, cycling and horse riding are based on research and surveys of the local populations and visitors to the area. National and local trends suggest that the activities are increasing in popularity for both leisure and utility trips. This is born out by some of the studies and statistics highlighted below.

3.3.2 Approximately 13.5% of people have a disability as defined by the Disability Discrimination Act and about 5% of these are wheelchair users. This does not simply cover people who are registered disabled but includes broadly physical, sensory and learning disabilities and disadvantages. The potential market within this group might double in number as disabled users may be accompanied by a carer.

3.3.3 Derbyshire County Council invited 8,000 members of the Citizens Panel to complete the county's September 2004 survey and had over 5,000 responses. The results show that over half of the local users of Derbyshire's Countryside enjoy using the trails and Greenways and that they are the third most enjoyed type of countryside used, (after country Parks and fields) out of ten categories provided. The survey also recorded;

- 70.7% walk or ramble in the countryside (69.2% in South Derbyshire)
- 23.9% cycle in the countryside (21.5% in South Derbyshire)
- 3.2% horse ride in the countryside (2.9% in South Derbyshire)

3.3.4 A recent county-wide survey was undertaken to assess the key issues for users of the countryside. The questionnaire showed that cyclists and horse riders consider the three top limitations for using the countryside are the lack

of suitable paths, a lack of circular links and a lack of suitable surfacing. Greenway development would help to address all three of these concerns.

- 3.3.5 The UK Day Visitors Survey 1998 (produced by the National Centre for Social Research) showed that there were almost six billion leisure day visits in the UK during 1998 involving an expenditure of around £71 billion. A quarter of all trips were to the countryside. The survey also highlights that walking is one of the top four prime reasons for day visits in the UK.
- 3.3.6 The National Cycle Network Route User Monitoring Report 2003 (produced by Sustrans) showed that the total use of the National Cycle Network has more than doubled from 2000 to 2003, now accounting for 126 million trips, (77 million cycle trips & 49 million walking trips). A sustained growth in cycle trips was recorded as a 10% increase between 2002 and 2003. It also showed that nearly a third of all trips replaced a car journey, and that traffic-free sections showed that nearly a third of all trips were for utility purposes.
- 3.3.7 Sustrans have drawn the conclusion from the monitoring programme that use will increase most where cycling and walking measures offer positive advantages over motor traffic, i.e. on traffic-free routes. The Department for Transport also supports the idea that use will be greatest on convenient, safe, accessible, comfortable and attractive routes.
- 3.3.8 There are many studies of Greenways across the UK that now demonstrate a sustained or continued growth in the usage of multi-user trails. Monitoring of trails in Derbyshire is in its infancy, though plans are progressing to install a number of user counter stations across the county. The Trans Pennine Trail User Monitoring Survey for 2003 recorded over 80,000 visitors on the Chesterfield Canal Greenway in the north east of Derbyshire, (around 50,000 walkers and 30,000 cyclists) in the first complete year of monitoring. The 2004 survey recorded an increase in cyclists using the Chesterfield Canal towpath section of the trail. Although there is currently no method of monitoring equestrian users, postal surveys for the Trans Pennine Trail suggest that horse riders account for 3.8% of users.
- 3.3.9 The British Horse Society's Equestrian Statistics record that there are almost 1 million horses in the UK. Furthermore, it is suggested that 2.4 million people ride in the UK which amounts to 4.5% of the national population (The British Equestrian Trade Association [BETA] National Survey 1999). In relation to the 2001 Census population figures mentioned above, this would translate to almost 3,700 horse riders in South Derbyshire and 180,000 horse riders in the East Midlands. If horse box parking facilities are provided it is understood that horse riders will travel across the region to visit a variety of riding locations.
- 3.3.10 BETA also shows that the equestrian business is a multi-million pound industry and the second largest land use after agriculture. With only 20% of the Rights of Way in England and Wales open to horse riding, there is a constant demand for more off-road riding routes around the country. The district of South Derbyshire has a Rights of Way network spanning some

580km, only 57km of which are open to horse riders, amounting to less than 10% of the entire network. This is less than half that recorded as the national figure. Although there are as yet no statistics for the number of horses kept in South Derbyshire it is suggested by anecdotal and observation evidence that there are a significant number of horses and riders in the district.

3.3.11 Other surveys have shown that safety is a key concern for walkers, cyclists and horse riders and that there would be a significant demand for more off-road routes if they were provided.

3.3.12 Much of South Derbyshire's rural agricultural economy falls within the National Forest and is realising benefits associated with farm diversification and tourism linked business opportunities. Taking advantage of the Forest Tender Schemes, many farms are adding visitor facilities, accommodation and new access routes across the forest area. This in turn will generate new demand for multi-user Greenway routes.

3.4 Conclusion

3.4.1 These national trends show that there is a large potential market for Greenway networks. Easy access walking and disabled access use is in high demand for leisure and health benefits and both cycling and horse riding are popular as countryside activities.

3.4.2 The demand assessment and Derbyshire data sources demonstrate that there is a good travel network to reach the area and a wide variety of trip generators to attract visitors to South Derbyshire.

3.4.2 It is reasonable to assume that there is a large suppressed market of all user groups who find it too difficult to use existing routes or who are restricted by a lack of available routes. The addition of a Greenway network will provide considerable improvement to the highway network by creating new opportunities for continuous off-road routes between destinations and links or circuit routes with the existing access networks. It has been demonstrated that there is a significant market in and around South Derbyshire of potential frequent users of a well developed Greenway network.

3.4.3 Although walkers have the largest system of paths available to them, the provision of easy access Greenways will be of particular value to those users with mobility difficulties, wheelchair user, and families with young children and prams. They will offer an opportunity to many on low incomes without access to cars, to enjoy the countryside and travel between communities.

3.4.4 It is also recognised that there is a growing trade in day visits, cycle tourism, countryside activity breaks and the multi-activity holiday markets across the UK. The growing success of the National Forest will certainly add to the tourism potential of South Derbyshire.

3.4.5 It is anticipated therefore that the installation of a Greenway network would create a popular sustainable travel and tourism facility that would be in high demand by local users and visitors alike, contributing to the economic benefits that would be enjoyed by the many related businesses in South Derbyshire.