

# **Greenway Strategy for West Derbyshire and the High Peak**

## **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 West Derbyshire and the High Peak. 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 Greenways.

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 districts 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. There are relatively few urban areas within the High Peak and Derbyshire Dales and they are comfortable out weighed by area's of rural character. 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 Derbyshire Dales as 69,472 and the High Peak as 89,421. 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 Manchester, Sheffield and Chesterfield and the smaller communities of areas around Macclesfield, Oldham, Rotherham and Stocksbridge. This creates a potentially very large local demand for a Greenway network in West Derbyshire and the High Peak.

- 3.2.4 Demand can also be assessed against the number and popularity of tourism or visitor based trip generators within the districts, 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 the Derbyshire Dales and the High Peak, it is likely however that tourist based day visits to the district will draw on a wider market from across the East Midlands, Greater Manchester and South Yorkshire with a population of over 15 million.
- 3.2.6 The transport system into the 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 and Manchester Airports. The M6 and M62 to the North West and A6 trunk road also provide access to the North. The potential therefore for visitors from within and outside the East Midlands Region is substantial.
- 3.2.7 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.
- 3.2.8 Apart from the fact that a large part of the study area falls within the Peak District National Park, Derbyshire Dales and the High Peak also have a mixed variety of visitor attractions from historic houses to distinctive craft shopping. Special interests are catered for across the region, there are various cultural experiences throughout the year, ranging from opera and music festivals to antiques and Well Dressing. Of national importance, the annual Well Dressing events take place from May to September, this traditional custom takes place in many of the towns and villages in the West of the County. With a strong historical influence, the Peak District and Derbyshire has a rich and diverse heritage – from Roman villages through to the Industrial Revolution. Other attractions include the New Stone Age Arbor Low, famous as the Henge of the Peak, and the Normans' Peveril Castle – home to Peveril of the Peak, while from our more recent past, there are splendid country houses and fascinating historic villages. A full list of visitor attractions can be seen in Box 3 below.

**Box 3: Visitor Attractions in Derbyshire Dales and the High Peak**

- Peak District National Park
- Middleton Top Visitor Centre & Cycle Hire
- Arkwrights Mill - Cromford
- National Trust – Longshaw Estate
- Carsington Reservoir
- Chatsworth House
- Haddon Hall
- Chestnut Centre
- Bakewell Market Town
- Ladybower Reservoir, Upper Derwent, Fairholmes Visitor Centre
- Cauldwells Mill
- Gullivers Kingdom
- Heights of Abraham
- Goyt Valley
- Castleton
- Cromford Canal
- Buxton Spa Town
- National Stone Centre, Wirksworth
- Ashbourne Market Town
- Glossop and New Mills Heritage Centre's
- Ilam & Grin Low Country Parks
- Lea Gardens
- Peak District Mining Museum
- Poole Cavern
- Red House Stables, Darley Dale
- Peak Village, Rowsley
- Crich Tramway Museum
- Derwent Valley Heritage Mills

### **3.3 Disabled Users, Walking, Cycling and 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 2006 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
- 23.9% cycle in the countryside
- 3.2% horse ride in the countryside

3.3.4 A county-wide survey was undertaken to assess the key issues for users of the countryside during the production of the County Councils RoWIP. 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 highlights that there were an estimated 3.6 billion leisure trips in England in 2005. Trip numbers were growing in the 90's, but there appears to have been a down trend in all trips including those to the countryside. Despite fewer visits overall, money being spent per individual is growing, with the average spend per trip being £25.09. The estimated total value was £90 billion, with 9.4 billion of this in the countryside.

3.3.6 The "Welcome to Sustrans' report on usage of the National Cycle Network during 2007 highlighted that the number of journeys by cycling and walking has grown to over 354 million, an increase of 4.7% on the number of trips made during 2006. This is the eighth year in succession that usage has increased, and it is growing much faster than the Network is extending in length. Since 2000 usage has nearly quadrupled from just under 90 million to 354 million trips a year. During the same period the Network itself has grown in length from under 5,000 miles to just over 12,000 miles.

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 now an integral part of any new Greenway scheme and counters now show detailed records across Derbyshire. The Trans Pennine Trail User Monitoring Survey for 2006 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. The recent piloting of monitoring equestrian users will help to determine numbers of horse riders in the future. Postal surveys for the Trans Pennine Trail suggest that horse riders account for 3.8% of users.

- 3.3.9 The British Equestrian Trade Association Horse Society's Equestrian Statistics record that there are around 1.3million horses in the UK. Furthermore, it is suggested that 4.3 million people ride in the UK which amounts to over 5% of the national population. Within these 4.3 million its suggested that 2.1 million ride more frequently than once a month. (The British Equestrian Trade Association [BETA] National Survey 1999). In relation to the 2001 Census population figures mentioned above, this would translate to almost 5,000 horse riders in Derbyshire Dales and the High Peak and 200,000 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.

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 Derbyshire Dales and High Peak Boroughs have a Rights of Way network spanning some 2561km (Derbyshire Dales 1613km, High Peak 948km), only 325km of which are open to horse riders (170km Derbyshire Dales, 155km High Peak), amounting to less than 15% of the entire network. This is less than that recorded as the national figure. Although there are no statistics readily available for the number of horses kept in Derbyshire Dales and the High Peak it is suggested by anecdotal and observation evidence that there are a significant number of horses and riders in these districts.

- 3.3.10 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. Equestrian schools and businesses connected with overnight accommodation, particularly in relation to the Pennine Bridleway National Trail, are also keen for an improved connecting network.

## **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 West Derbyshire.

- 3.4.3 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 Derbyshire Dales and the High Peak of potential frequent users of a well developed Greenway network.
- 3.4.4 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 limited mobility, 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.
- 3.4.5 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 success of the Peak District National Park has already added to the tourism potential of West Derbyshire.
- 3.4.6 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 Derbyshire Dales and the High Peak.