The National Forest
Accommodation Analysis

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The National Forest Accommodation Analysis

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1 Introduction and Executive Summary

1.1 Introduction

This report analyses the range and spread of visitor accommodation across The National Forest. It assesses the strengths and weaknesses in provision overall and across the Forest's six district/borough local authority areas. Comparisons are made with bedstock provision at similar destinations. The report concludes by assessing what accommodation the destination may be lacking. Following this report, further feasibility studies may be required to assess demand for specific accommodation facilities in the Forest.

1.2 Executive summary

STEAM statistics show that visitor numbers are increasing but bedstock for serviced accommodation is actually reducing. The destination needs to have a good supply of bedstock and continue to stimulate demand for visitors to stay overnight. The risk of not investing in accommodation is visitors will still come to the Forest, but stay (and spend) in neighbouring areas.

There is a need to look at the type and quality of bedstock across the districts, for example there are no 4 star hotels within The National Forest (although there are a few in nearby Castle Donington, Kegworth and Derby).

Most self-catering properties have between 1-3 units. There is real growth in terms of visitors choosing self-catering accommodation. In order to capitalise on this trend, the Forest needs more self-catering properties with a higher density of units, larger campsites and a variety of alternative and environmentally friendly accommodation such as bunk barn accommodation and tepees. These would create a distinctive and memorable experience for visitors to The National Forest.

Groups represent a major opportunity for The National Forest and are one of the destination's target markets but there is inadequate coach parking and a lack of accommodation provision in terms of larger quality hotels with conference facilities. Groups tend to book an annual programme of visits and have huge potential in terms of repeat visits and spend.

There are specific areas across the Forest with sparse provision across all categories of accommodation, particularly Charnwood, Hinckley & Bosworth and Lichfield. North West Leicestershire would benefit from more self-catering developments in the Forest as well as serviced accommodation, especially hotels. South Derbyshire is lacking in Forest-based campsites and hotels and East Staffordshire is under-served within the destination for self-catering accommodation and campsites.

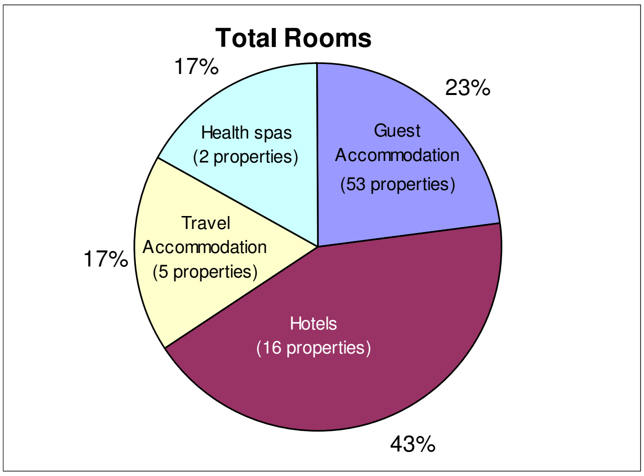
Other destinations similar to The National Forest (such as Forest of Dean, New Forest, Brecon Beacons and other national parks) have more bedstock across all categories. To grow The National Forest as a tourism destination we need to aspire to achieving the quality and range of accommodation that other, major destinations provide.

2 Existing accommodation by accommodation category

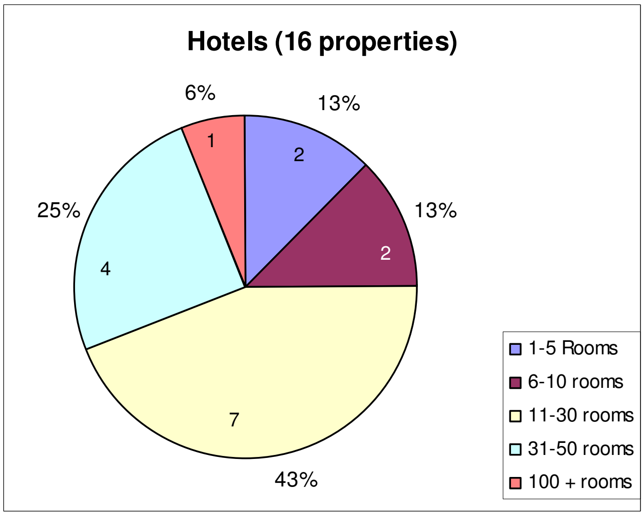
2.1 Serviced Accommodation

There are 76 properties in The National Forest which include 53 guest accommodation (B&Bs, Inns etc), 16 hotels, five travel accommodation (Premier Inn and Travelodge) and two health spa hotels. These contain a total of 1,061 rooms and 2,149 bedspaces.

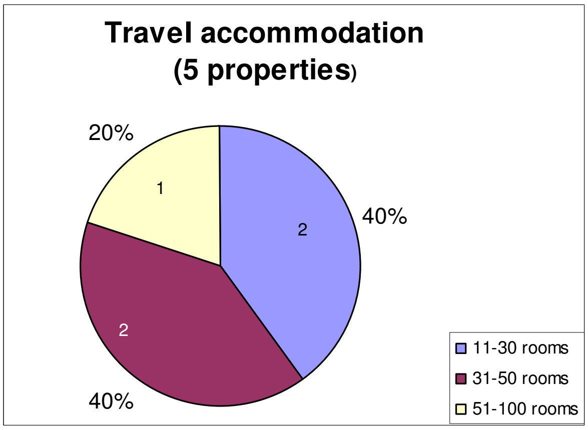
Only 23% of rooms are guest accommodation even though this represents 53 properties. The 16 hotels provide 43% of rooms. The five travel accommodation represents 17%. But most interesting – the two health spas (Hoar Cross and Champney Springs) provide 17% of the total rooms across the Forest.



Most guest accommodation is under five rooms. The majority of hotels (43%) have 11-30 rooms. There is only one hotel in the Forest that has over 100 rooms. This is the Express by Holiday Inn in Burton upon Trent, which is not inspected by AA or Visit Britain.

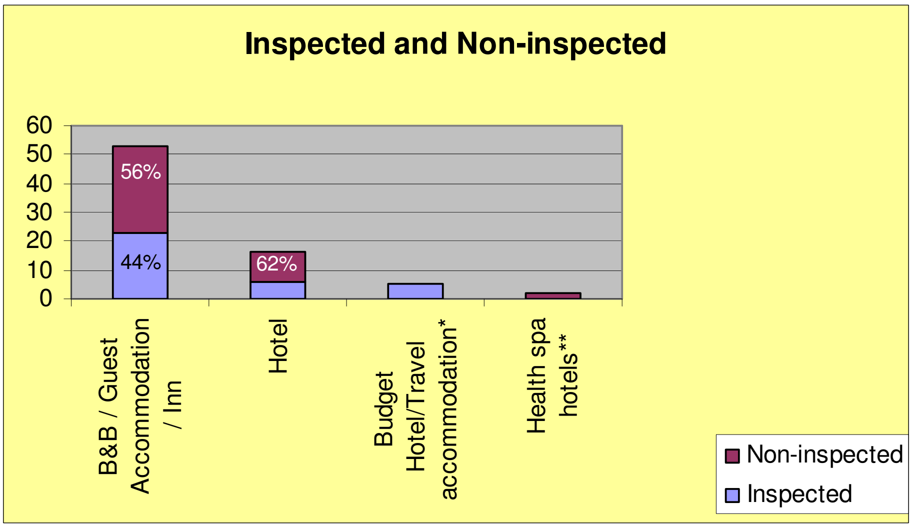


There is one property that has 51-100 rooms under the category of travel accommodation, which is the Travelodge at Markfield, in the Hinckley & Bosworth district. Both health spas in the Forest have between 51-100 rooms.

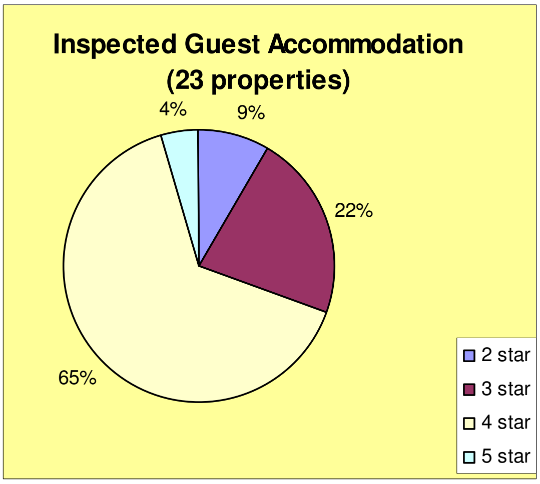


Accreditation

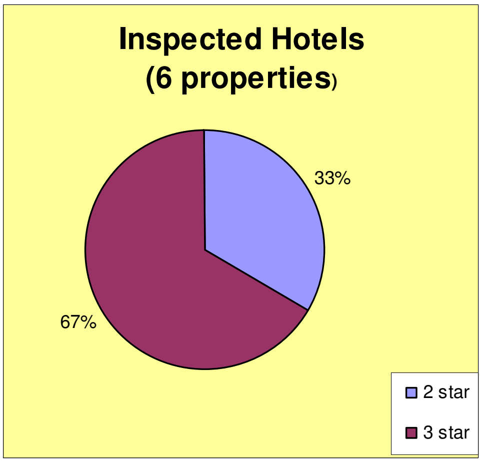
Only 38% of all serviced properties are inspected by AA or Visit Britain. 44% of guest accommodation and 38% of hotels are inspected through these schemes. Travel accommodation hotels are classified by Visit Britain as Budget Hotels. Neither of the health spa hotels subscribe to the national accreditation schemes.



Of the inspected guest accommodation, the majority are 4-star.

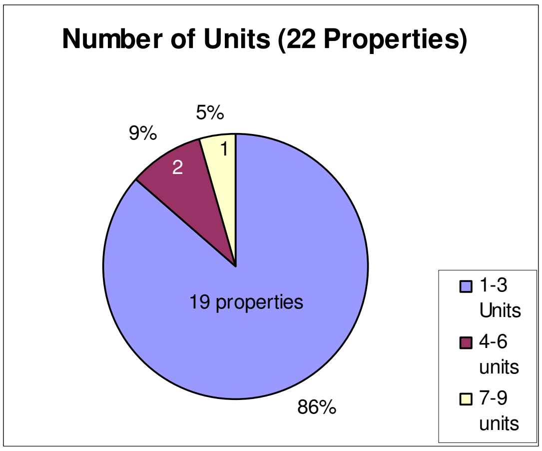


The majority of inspected hotels are 3-stars – there are no 4 or 5-star hotels in The National Forest.



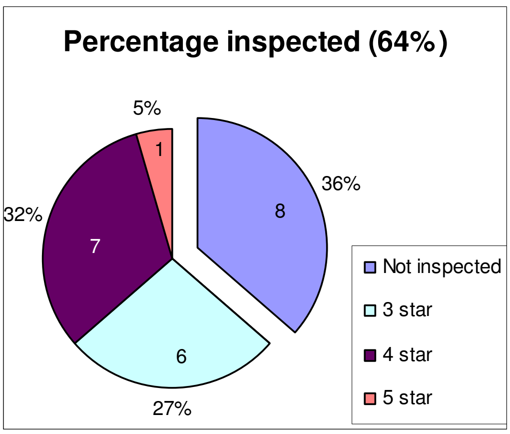
2.2 Self-catering Accommodation

Of the 22 self-catering properties, most have between 1-3 units (each unit accommodating on average four people). Only three properties have more than four units and only one has more than seven units (Upper Rectory Farm Cottages in North West Leicestershire).



Accreditation

The percentage of self-catering properties within the inspection scheme is higher than for guest accommodation with 64% inspected through the nationwide schemes. These tend to be good quality (3-5-star) although there is only one property that is 5-star.

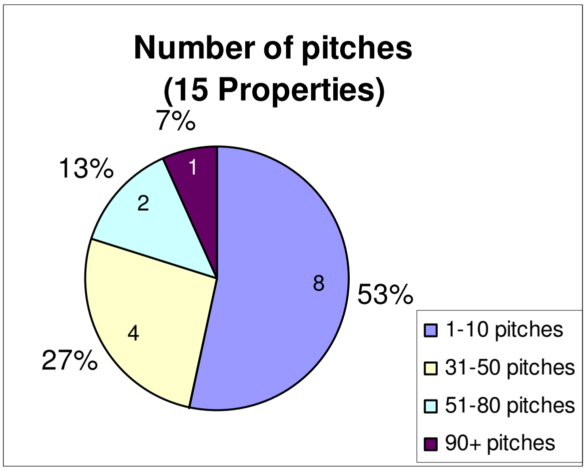


2.3 Youth Hostels

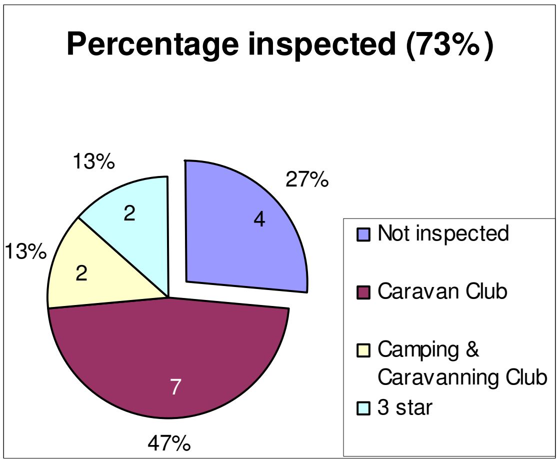
There is one youth hostel in North West Leicestershire district of The National Forest. This has 23 rooms with 83 bedspaces and is inspected to be 4-star.

2.4 Camping & Caravanning

Of the 15 campsites in the Forest, almost half are small (1-10 pitches). Only one (Conkers Campsite) has 90+ pitches.



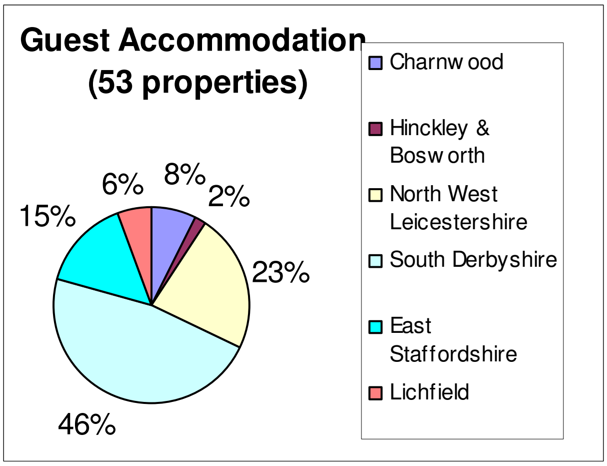
<u>Accreditation</u>
Most established campsites have undertaken some form of inspection. Only two of the campsites are inspected through AA or Visit Britain but 11 are inspected by either the Caravan Club or the Camping & Caravanning Club. This means only 27% are uninspected and these tend to be the more informal 'space in a field' campsites.



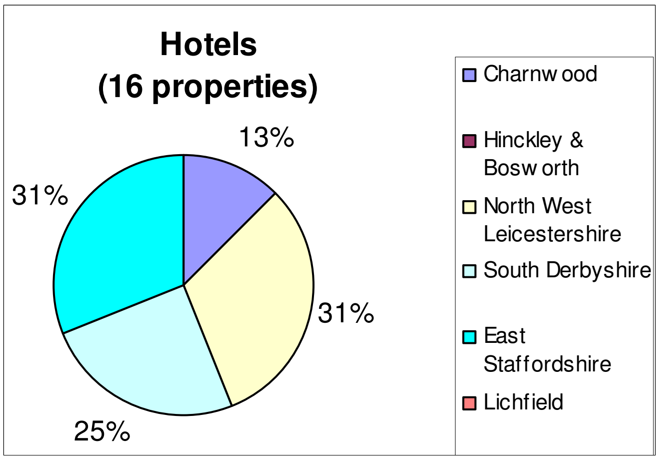
3 Analysis of accommodation across The National Forest by district areas

3.1 Serviced accommodation

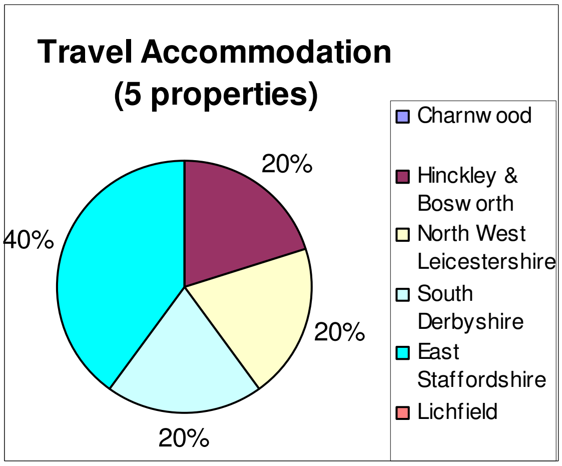
Of the 53 guest accommodation properties 46% are in South Derbyshire.



The majority of hotels are found in East Staffordshire, South Derbyshire and North West Leicestershire. There are no hotels in the districts of Hinckley & Bosworth or Lichfield in The National Forest.

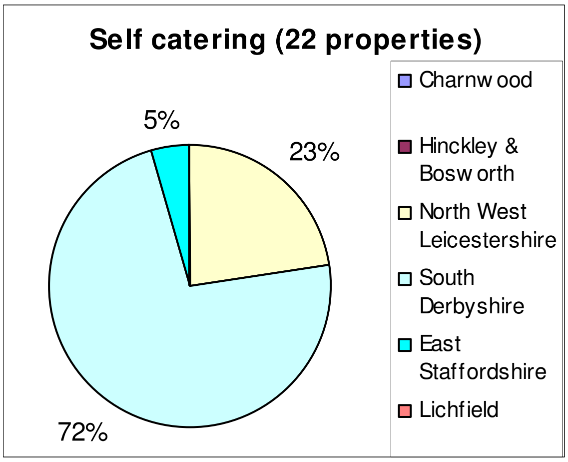


Travel accommodation is thinly spread across the Forest, but there are no travel accommodation hotels in the districts of Charnwood or Lichfield in The Forest.



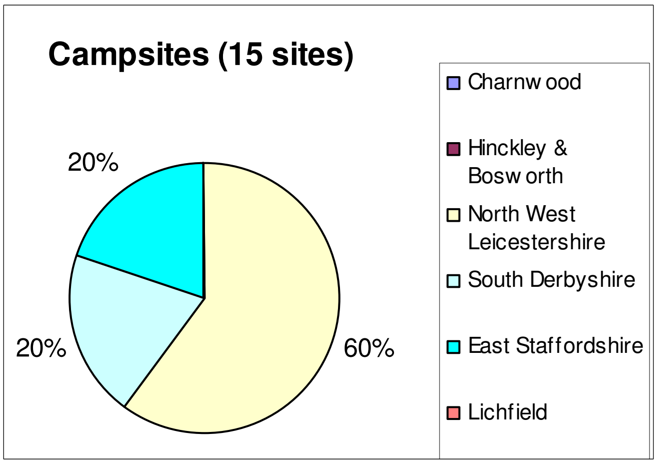
3.2 Self-catering

Similar to guest accommodation, the highest percentage of self-catering properties in the Forest are in South Derbyshire (72%). There are no self-catering properties in the districts of Charnwood, Hinckley & Bosworth or Lichfield in The Forest.



3.3 Campsites

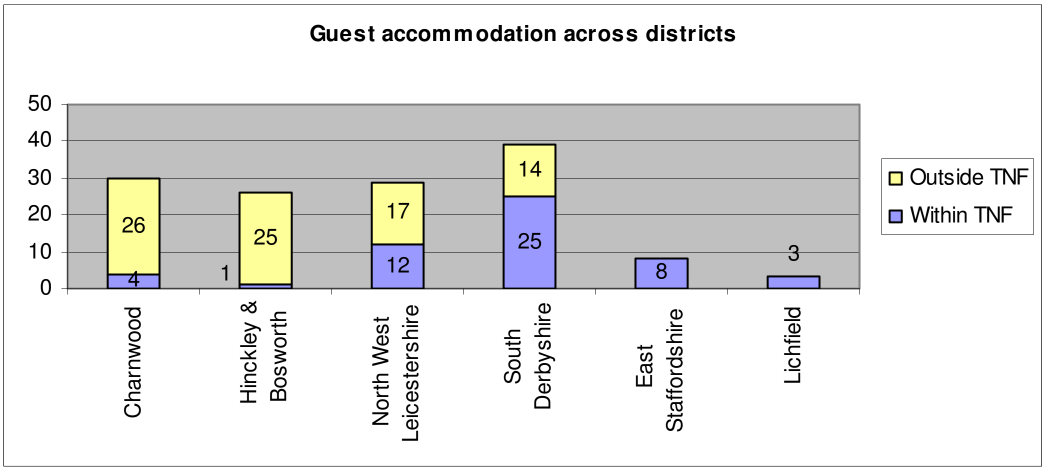
The highest proportion of campsites in the Forest are within the North West Leicestershire district. There are no campsites in the districts of Charnwood, Hinckley & Bosworth or Lichfield in The National Forest.



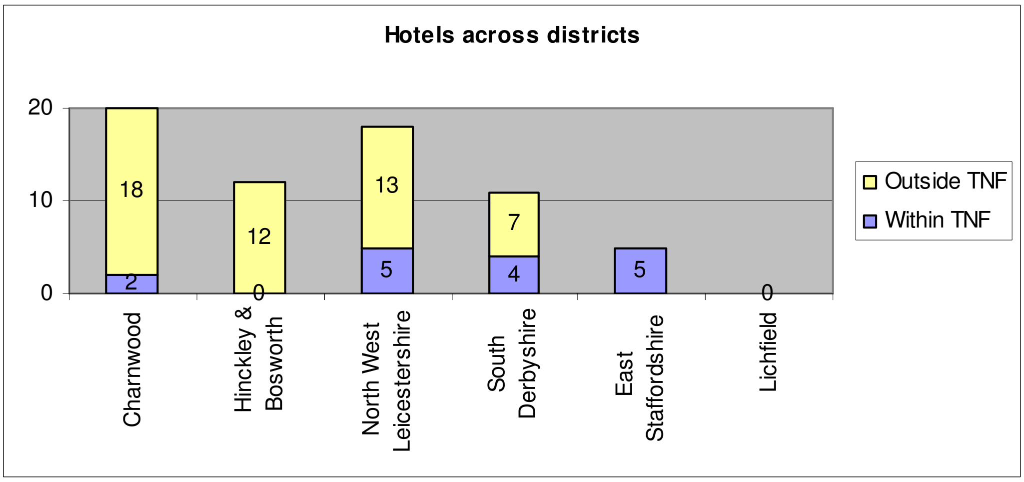
4 Analysis of accommodation outside The National Forest boundary

When looking at the bedstock for the Forest, it is useful to look at the total stock for the whole district. As Staffordshire does not subscribe to the STEAM model, NFC does not have data for accommodation outside The National Forest boundary for East Staffordshire and Lichfield districts.

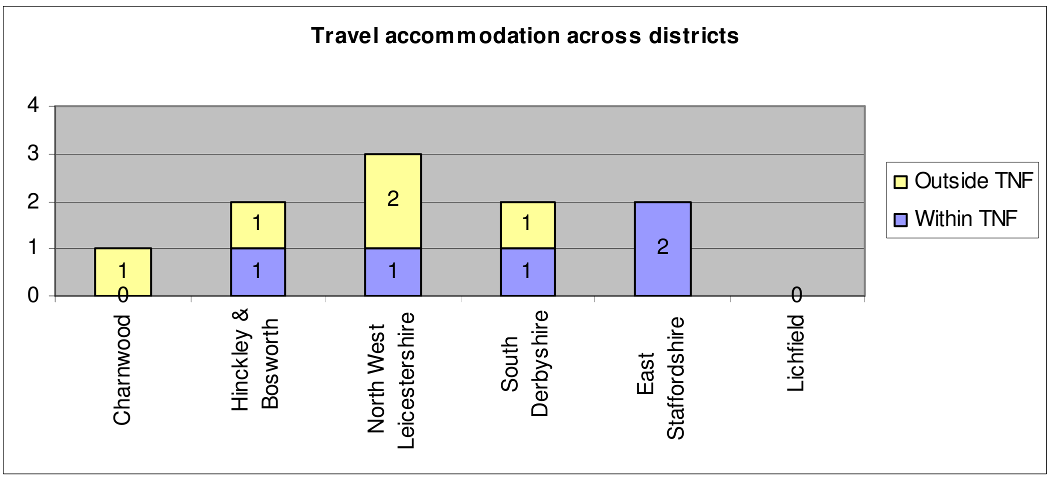
Guest accommodation in South Derbyshire and North West Leicestershire is spread across the districts, whereas only one property in Hinckley & Bosworth and four properties in Charnwood are within The National Forest.



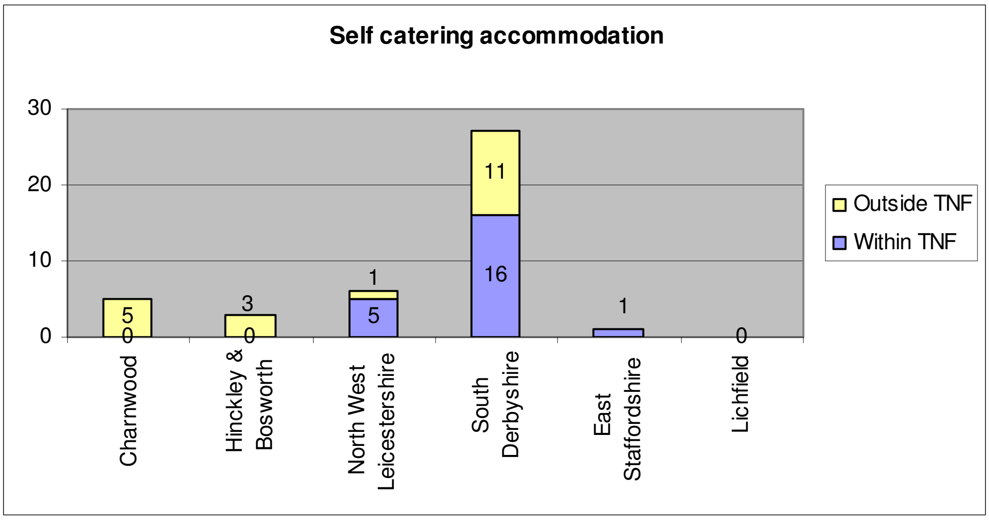
The majority of hotels across all districts are located outside The National Forest.



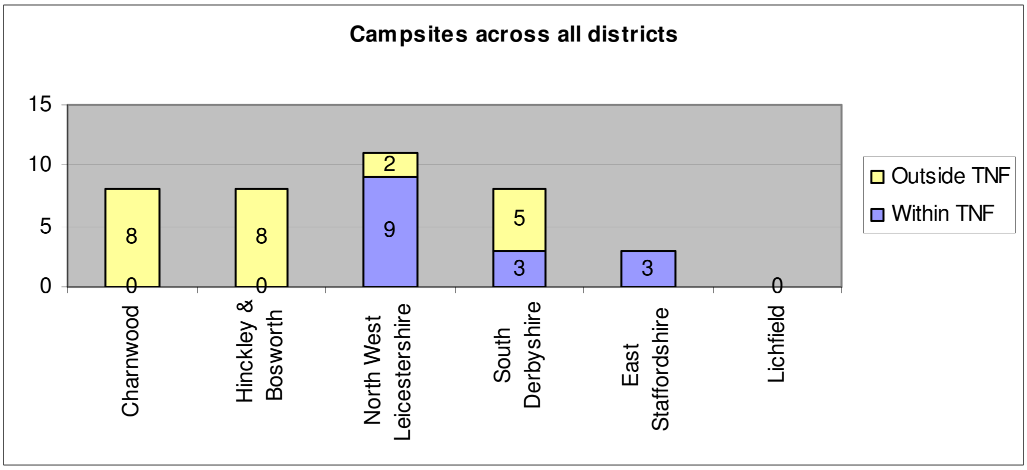
Travel accommodation in Charnwood is outside the Forest.



Most of the self-catering accommodation in North West Leicestershire is within the Forest probably because many are relatively new (ie Norman's Barn, Lakeview Lodge). All of the self-catering properties in Hinckley & Bosworth and Charnwood are outside the Forest. South Derbyshire accommodation is fairly evenly sited.



There is a similar picture for campsites, in that there are none within the Forest in the Hinckley & Bosworth and Charnwood districts and the proportion in the North West Leicestershire part of the Forest is very high. This is due to the fact that most of the campsites have developed as a direct result of diversification through the woodland creation scheme (ie Ingles Hill, Measham House Farm, Conkers Campsite). Interestingly there are more campsites outside the Forest in the South Derbyshire district.



5 Bedstock in Comparison Destinations

Bedstock data has been collated for a small number of relevant destination areas (ie comparable size and a tourism draw to which the National Forest aspires) most notably for the National Parks.

Unfortunately, data is not collected by all destinations in a common format. This data was collected between 2004-2009, so there may be further accommodation added to the network or closed since it was collected. However it serves to give an indication of approximate bedstock.

The results show that all of the comparator destinations have more bedstock across all categories.

	National Forest	Yorkshire Dales	Yorkshire Moors	New Forest	Brecon Beacons	Exmoor	Forest of Dean
Serviced							
Properties	76	341	359		164	247	
Bedspaces	2,149	5,200	4,451	4,123		4,852	
self-catering							
Units	22	388	292	661	108	456	614
Bedspaces	184				768		
Hostels							
Properties	1				15		
Bedspaces	83				524		
Camping							
Properties	15	21	26		22	96	
Pitches	425			16,030	868	8,825	2,336
Holiday Park Spaces				5,500			

**Data collected by The Tourism Company. Where data is unknown, this is left blank.*

6 Assessment of accommodation across the destination

If The National Forest is to grow as a destination, it needs to grow its accommodation stock across all categories. This was recognised within the Vision for the National Forest as a Sustainable Tourism Destination. An extract from this vision is contained in the appendices.

Listed below is accommodation that the destination currently does not have. Some of these accommodation types (such as 5 star or boutique hotels) may not be appropriate for the destination and further work would be required to look at the feasibility and market demand of a specific accommodation proposal.

6.1 Serviced accommodation

- 4 and 5 star hotels
- Boutique hotels
- Larger hotels with conference facilities

6.2 Self-catering

- Self-catering properties with higher density of units

6.3 Campsites

- Large campsites

6.3 Other accommodation

- Alternative and environmentally friendly accommodation such as tepees and bunk barn accommodation

6.4 Specific needs by district

- **Charnwood, Hinckley & Bosworth, Lichfield**
  More of <u>all types</u> of accommodation are needed across the districts of Charnwood, Hinckley & Bosworth and Lichfield in the Forest

- **North West Leicestershire**
  There are only five self-catering properties in North West Leicestershire, so developments of this type should be encouraged as well as serviced accommodation, especially hotels

- **South Derbyshire**
  South Derbyshire would benefit from more campsites and hotels

- **East Staffordshire**
  East Staffordshire has a lack of self-catering accommodation and campsites in the Forest

Appendices

The Vision for The National Forest as a Sustainable Tourism Destination

The limited range and supply of visitor accommodation was identified as a weakness within The Vision for The National Forest as a Sustainable Tourism Destination.

The development of accommodation features strongly within its associated Action Plan:

6.1.2 Support the development of good quality accommodation

In product terms, the main priority is accommodation. The lack of quality serviced accommodation, particularly at the higher end, is a major weakness of TNF. This is a major challenge given the need to raise profile and encourage more staying visitors. Ideally, TNF should have one or more four/five star (resort) hotels in the centre of TNF[1] – and branded as 'Forest' hotels - and/or a number of smaller boutique hotels of distinction. There is also a need for more B&Bs in pubs, on the canals, farms and in private homes. The new youth hostel has shown how good quality, environmentally sensitive provision can attract a new market. In conjunction with this, there is scope to improve the overall quality of the existing serviced accommodation stock. Accommodation development will be assisted through:

- Encouraging accommodation development and upgrading in local planning policy and control.
- Promoting participation in grading schemes.
- Using the inspection process to identify opportunities for further investment.

Business tourism in serviced accommodation is already important in TNF and meetings/conferences present an opportunity for gaining more high value business. Current facilities are limited. The main opportunities involve improving provision in hotels and at certain attractions and other special venues rather than new purpose-designed facilities.

Priority should, however, be given to the development of more high quality, accredited self-catering accommodation and, in particular, exemplar forest cabins. A cabin development of 100-120 units – once a mature woodland site is identified - would be a flagship project for TNF. There are opportunities for a range of other accommodation products including:

- Smaller, individual cabin schemes.
- The conversion of redundant farm and industrial buildings
- Boat rentals (private and fleet hire) and visitor moorings on the canals.
- Camping and caravan sites for touring caravans.
- New and converted 'bunk barn' type accommodation.
- Further youth hostel accommodation.

Action Point:
1. **Prepare visitor accommodation market review, clarify planning policy and identify potential hotel and holiday village development sites**
2. **Support the upgrading of visitor accommodation as appropriate, including the provision of meeting facilities (ongoing)**

[1] Project proposals include Conkers, Barton Marina and the proposed FA National Football Centre.

Summary tables of accommodation stock

The National Forest Serviced Accommodation

	Properties	1-5 Rooms	6-10 rooms	11-30 rooms	31-50 rooms	51-100 rooms	100 + rooms	Total Rooms	Total bedspaces
B&B / Guest Accommodation / Inn	**53**	36	15	2	0	0	0	244	467
Hotel	**16**	2	2	7	4	0	1	453	923
Budget Hotel/Travel accommodation*	**5**	0	0	2	2	1	0	185	393
Health spa hotels**	**2**					2		179	366
Total	**76**	**38**	**17**	**11**	**6**	**3**	**1**	**1061**	**2149**

*inc Travelodge/ Premier Inn

**Champneys and Hoar Cross

	Inspected	Not inspected	1 star	2 star	3 star	4 star	5 star
B&B / Guest Accommodation / Inn	**23**	30		2	5	15	1
Hotel	**6**	10		2	4		
Budget Hotel/Travel accommodation*	**5**						
Health spa hotels**		2					
Total	**29**	47					

The National Forest Self-catering Accommodation

	Properties	1-3 Units	4-6 units	7-9 units	10+ units	Total units	Total bedspaces
Self-catering	22	19	2	1	0	46	184

*average unit has 4 bedspaces

	Inspected	Not inspected	1 star	2 star	3 star	4 star	5 star
Self-catering	14	8	0	0	6	7	1

The National Forest Youth Hostel Accommodation

		Inspected	Grading	Rooms	Bedspaces
Youth Hostel	1	Yes	4 star	23	83

The National Forest Camping & Caravanning

	Sites	1-10 pitches	11-30 pitches	31-50 pitches	51-80 pitches	90+ pitches	Total pitches
Campsites	15	8	0	4	2	1	425

	Inspected	Not inspected	Caravan Club	Camping & Caravanning Club	3 star
Campsites	11	4	7	2	2

The National Forest Accommodation analysed by district

The National Forest Serviced Accommodation

	Properties	Charnwood	Hinckley & Bosworth	North West Leicestershire	South Derbyshire	East Staffordshire	Lichfield
B&B / Guest Accommodation / Inn	**53**	4	1	12	25	8	3
Hotel	**16**	2		5	4	5	
Budget Hotel/Travel accommodation*	**5**		1	1	1	2	
Health spa hotels**	**2**			1		1	
Total	**76**	6	1	20	28	18	3

The National Forest Self-catering, Hostel Accommodation and Caravan sites

	Properties	Charnwood	Hinckley & Bosworth	North West Leicestershire	South Derbyshire	East Staffordshire	Lichfield
Self-catering	22	0	0	5	16	1	0
Youth Hostel	1	0	0	1	0	0	0
Campsites	15	0	0	9	3	3	0

Analysis of accommodation across districts

Hotels	Within TNF	Outside TNF
Charnwood	2	18
Hinckley & Bosworth	0	12
North West Leicestershire	5	13
South Derbyshire	4	7
East Staffordshire	5	
Lichfield	0	

Self-catering	Within TNF	Outside TNF
Charnwood	0	5
Hinckley & Bosworth	0	3
North West Leicestershire	5	1
South Derbyshire	16	11
East Staffordshire	1	
Lichfield	0	

Guest accommodation	Within TNF	Outside TNF
Charnwood	4	26
Hinckley & Bosworth	1	25
North West Leicestershire	12	17
South Derbyshire	25	14
East Staffordshire	8	
Lichfield	3	

Campsites	Within TNF	Outside TNF
Charnwood	0	8
Hinckley & Bosworth	0	8
North West Leicestershire	9	2
South Derbyshire	3	5
East Staffordshire	3	
Lichfield	0	

Travel accommodation	Within TNF	Outside TNF
Charnwood	0	1
Hinckley & Bosworth	0	1
North West Leicestershire	2	2
South Derbyshire	1	1
East Staffordshire	2	
Lichfield	0	

STEAM research 2003-2008

To support and monitor the impact of tourism, the National Forest Company has commissioned STEAM research into the value and volume of visitors annually since 2003. At the time of putting this report together, up to 2008 data was available. Headline trends are detailed below. It is almost impossible to provide forecast trends at this point in time as the statistics are expected to dip for 2009 due to the recession. How long this dip will last is not known.

Employment

- Direct employment in tourism has grown from 2003-2008 by 11.7%.

Visitor Numbers

- Visitor numbers to The National Forest have increased by 17.7% to 7.9m.
- Of these visitors, the proportion of overnight stays has dropped slightly from 7.6% to 6.9%. This impacts upon the local economy as the economic impact per day from day visitors is just £29, whereas visitors in serviced accommodation (hotels, B&Bs etc) spend around £104 per day and self-catering visitors around £43 per day.

Economic Impact*

- In terms of the impact on the economy, 74.6% of the spend is from day visitors, 13.1% from visitors in serviced accommodation, 2.7% from visitors in self-catering accommodation and 9.6% from visitors staying with friends/relatives.
- Overall economic impact is up by 9.4% but this is largely due to an 18.8% increase in the number of day visitors (up from 6.2m in 2003 to 7.4m in 2008).
- Worryingly, the spend from visitors staying in serviced accommodation is decreasing year on year. The amount they spend and the average length of stay is also decreasing.

Beds

- The number of beds overall has gone up 16.5% - but serviced bedstock has declined by 4.3% in the last 6 years.
- Self-catering bedstock is up by 71.2%. This sector has accommodated 57% more visitors with an increased economic impact of 109.8%. It must be remembered though that this started from a low base.

Traffic

- Tourism traffic is up by 18.2%. This is largely due to the increase in day visitors. The destination needs to generate more overnight stays and promote cycling, walking and public transport.

** This data has been indexed to reflect the value of money in real terms. Therefore the 2003 economic impact values have been expressed in the values of 2008 pounds and take into account the inflationary affect that may otherwise bias the data.*

Economic impact (£millions)
Total expenditure – £287.12m. Highest spend indirect, shopping, food & drink
Peak months for Expenditure Mar, Aug and Nov. (Interestingly Easter was Apr which was one of the lowest months). Lowest month Feb.

£214.14m generated by day visitors (74.6%)
£72.98m generated by overnight stays (25.4%) – Of this, serviced accounts for 13.1%, non-serviced 2.7% and Staying with friends and relatives (SFR) 9.6%

Overnight Stay Revenue
£37.70m from serviced (51.7%), £7.85m from non serviced (10.8%), £27.43m SFR (37.6%)

Tourist days (thousands)
Total Tourist Days 8,687
1,262.07 overnight stays (14.5%) Serviced (4.2%), non-serviced (2.1%), SFR (8.3%)

7,424.46 day visitors (85.5%)

Tourist trips (thousands)
Total Tourist Numbers 7,971
546.52 overnight stays (6.9%)
7,424.46 day visitors (93.1%)

Overnight stays
216.51 Serviced (39.6%), 26.98 non-serviced (4.9%), 303.03 SFR (55.4%)

Average stay for overnight visitors
Serviced 1.7 days, non-serviced 6.7 days, SFR 2.4 days

Economic impact per day per visitor (based upon tourist days)
Day visitors - £29
Overnight visitors - Serviced £104, non-serviced £43, SFR £38

Employment
Total full-time equivalents (FTE) supported by tourism 4,422. Highest shopping, food & drink. This includes jobs that exist, have been created and safeguarded.

Tourist traffic (thousands)
Number of Tourist Vehicles total 1,998

Bed stock
Serviced 2,149, Non-serviced (inc. camping) 1,459
Total number of beds: 3,607

2003-2008 (All expenditure indexed)

Economic Impact (£millions)
Increased from £262,340 in 2003 to £287,121 in 2008 (9.4%).

The economic impact attributed to visitors staying in non-serviced accommodation increased by 109.8% from £3,742 to £7,853 between 2003 and 2008.
Day visitor economic impact has seen an increase from £180,306 to £214,138 of (18.8%).

The economic impact from SFR decreased by 2.1% (£28,007 to £27,425)
But the economic impact attributed to visitors in serviced accommodation is down by 25% (from £50,285 to £37,704 despite an increase of 11% in tourist numbers for serviced).

Seasonality – peak months are March, July and August and November with an increase for Easter. Lowest months are April and October.

Tourist days (thousands)
Tourist days increased by 16.5% from 7,454 in 2003 to 8,687 in 2008

Tourist trips (thousands)
Tourist trips rose by 17.7% from 6,770 in 2003 to 7,971 in 2008

There has been an 18.8% increase in day visitors from 6,251 in 2003 to 7,424 in 2008

The percentage of overnight stays has reduced from 7.6% to 6.9%

The average stay for overnight visitors dropped by 13.9%, for serviced accommodation from 1.9 days to 1.7 days. SFR stayed constant at 2.4 days. There was a 22.5% increase in the average number of days for non-serviced from 5.5 days to 6.7 days.

Economic impact per day per visitor (based upon tourist days) is interesting:
Day visitors have stayed constant at £29. SFR has also stayed constant at £38.
Overnight visitors – the average spend for serviced has dropped by 22.5% from £135 in 2003 to £104 in 2008. Non-serviced has increased by 9% from £40 to £43.

Employment
There has been an 11.7% increase in employment from 3,959 FTEs supported by tourism in 2003 to 4,422 in 2008.

Tourist Traffic (thousands)
Number of Tourist Vehicles increased from 1,690 in 2003 to 1,998 (18.2%)

Bed stock
The total number of beds has increased by 16.5% from 3,097 in 2003 to 3,607 in 2008.
But serviced bedstock has reduced by 4.3% from 2,245 beds in 2003 to 2,149 by 2008.
Non-serviced, however, increased by 71.2% from 852 beds in 2003 to 1,459 by 2008.

Quality Standards

The accommodation inspection scheme, operated by Visit Britain and the AA, is the way we can assess the *range* in the quality of accommodation across the destination.

NFC and partners only allow inspected properties to participate in The National Forest & Beyond Visitor Campaigns.

This means that we cannot promote the wonderful accommodation at properties such as Catton Hall and within the health spas (which represents 17% of the total rooms in the Forest). We expanded the 'inspected' definition recently to include branded hotels (which adhere to internal quality standards schemes) and budget hotels, enabling us to be able to include travel accommodation and our larger hotels within our campaigns. This is important as only 38% of all hotels and guest accommodation in The National Forest are inspected by AA or Visit Britain.