Cumbria Partners
West Cumbria Strategic Forum

West Cumbria Spatial Master Plan

Tourism: Working Paper 5

Prepared by Grant Thornton and The Leisure and Tourism Organisation

Final Report

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LTO
THE LEISURE & TOURISM ORGANISATION

Grant Thornton

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1 Introduction

This report has been produced by Grant Thornton and The Leisure and Tourism Organisation (LTO). Grant Thornton have undertaken a detailed review of the general tourism market, issues and opportunities while LTO focused on the particular merits of current proposals around Derwent Forest, the potential market for a large leisure attraction in West Cumbria either from Derwent Forest or some other alternative anchor.

1.1 Characteristics of the West Cumbria tourism industry

Tourism is an important industry in West Cumbria and makes a significant contribution both economically and socially to West Cumbria. There is a direct and indirect economic contribution from the visitor economy, a sense of pride that outside recognition brings and enhancements to quality of life from visitor infrastructure with events such as cafes, restaurants and festivals.

1.1.1 Visitor numbers/spend

Data for Allerdale and Copeland shows that Allerdale has a larger visitor economy, and its performance has been stronger than that of Copeland. Allerdale's performance has broadly followed that of Cumbria as a whole. Copeland has experienced declining tourism revenue and only modest growth in tourist numbers.

Allerdale has almost twice as many tourist days, and almost three times the level of total tourist revenue compared with Copeland. Allerdale's strong performance reflects the strong tourism offering around Keswick. The challenge is to spread the visitors further to the west.

The table below summarises the key characteristics of tourism in West Cumbria. Data is for 2004 unless otherwise stated.

Figure 1-1: Key tourist indicators

	Allerdale	Copeland	West Cumbria	Cumbria
Tourism Revenue (£m)	216.8	77.7	294.5	1,119.0
Change in Revenue (2000 - 2004)	12.8%	-3.9%	7.9%	15.1%
Tourist Days (m)	6.0	2.5	8.5	29.5
Change in Tourist Days (2000-2004)	8.1%	0.2%	2.4%	17.5%
Tourist Numbers (m)	2.7	1.7	4.4	15.8
Change in Tourist Numbers (2000-2004)	13.5%	4.3%	10.0%	12.6%
Av. length of stay	2.2	1.5	2.0	1.9
Employment (FTEs)	5,311.0	1,903	7,214	25,909
Change in employment (2000-2004)	10.7%	2.1%	8.3%	12.0%
Contribution to tourism employment in region	20.5%	7.3%	27.8%	100.0%
Proportion tourist bedspaces	22.3%	7.4%	29.7%	100.0%

Source: Scarborough Tourism Economic Activity Monitor (STEAM), Cumbria Tourist Board.

1.1.2 Visitor profile

Allerdale attracts a predominately day visitor market, approximately 58% of all tourists who visited in 2004 were day visitors. Of staying visitors, 22% stayed in serviced accommodation, 14% in non-serviced accommodation and 5% with friends and relatives.

Visitors staying in serviced accommodation have the highest daily spend (at almost £70 per day), while those in non-serviced accommodation spend the most overall, reflecting their longer stay (£216 per stay, compared with £148 per stay for serviced accommodation). However, both categories of staying visitors spend far more than day visitors (£23 per visit).

The key to driving greater tourism revenues is to encourage greater staying visitors.

The socio economic profile of visitors to the region varies. The region attracts a range of visitors. Operators thought that the largest group are white, salaried, middle class, 40+.

1.1.3 Festivals

There are a number of festivals in West Cumbria: These festivals make an important contribution to civic pride for residents of West Cumbria. They also raise the profile of West Cumbria.

The largest is the bi-annual Whitehaven Festival. There is also the Maryport Blues Festival, and the Keswick Jazz Festival. These festivals are creating an important visitor following and provide an ideal opportunity to showcase the region.

Other events include the World Mountain Running Championships in Keswick.

These events have the potential to grow and create a greater profile for West Cumbria. However, a key challenge is turning these festivals into repeat/staying visitors to the region.

1.1.4 Top visitor attractions

Some of Cumbria's top visitor attractions are within Allerdale and Copeland. Of the top, 20 attractions for Cumbria[1], 8 are within West Cumbria. The top visitor attractions in West Cumbria and visitor numbers for 2005 are as follows:

- Ravenglass and Eskdale Railway - 125,374 (the 5th most popular attraction in Cumbria)
- Sellafield Visitor Centre - 96,694
- Muncaster Castle - 85,433
- Cumberland Pencil Museum - 78,745
- Priests Mill - 68,160
- The Teapottery - 55,360
- The Beacon - 53,364
- Lake District Coast Aquarium - 45,520

However, by far the most popular attraction for Cumbria is Windermere Lake Cruises, with 1,282,702 visitors in 2005. The Ravenglass and Eskdale Railway, the most popular attraction in West Cumbria (according to available data), is the fifth most popular visitor attraction in Cumbria.

[1] *Only includes visitor attractions providing data for 2005, and those allowing figures to be published.*

Overall, West Cumbria appears to have a number of good visitor attractions. However, consultation suggests that these could be improved. The consultation also suggests that these attractions offer little for repeat visitors, with the offering changing little over time.

There is also some distance between the central Lake attractions and those on the West Coast. Nevertheless, the region is not maximising the potential from visitors to these attraction by encouraging them to stay within the region.

1.1.5 Accommodation stock

The consultations have identified a need for improvements in the quality of the accommodation stock needed to retain people in the region.

There are 464 serviced accommodation establishments in Allerdale and 133 in Copeland, with a total of 5,059 rooms and 10,000 bedspaces.

This accounts for 27% of the total accommodation stock in Cumbria, and 29% of all rooms.

In addition to serviced accommodation, there is a large stock of non-serviced accommodation, comprising houses and chalets, caravans and camping, and hostels. Total bedspaces at these establishments exceed 23,000 (7,584 at houses and chalets, 14,433 at caravans and camping and 1,321 at hostels).

Occupancy rates exhibit seasonal variations. In August, around 90% of self catering units are occupied, compared with 28% in January.

Occupancy rates for serviced accommodation show less seasonal variation - slightly over 70% in August, and down to 35% in January. A longer time series of occupancy rates is available for serviced accommodation. Since 1999 there has been a gradual increase in occupancy levels, notwithstanding a dip in 2001 due to the impacts of foot and mouth disease. In 1999 average occupancy was 49%, and in 2005 this stood at 56%. Similarly to self-catering accommodation, there was a slight fall in occupancy between 2004 and 2005.

Despite the apparent hotel capacity, there are also areas with accommodation shortages, and gaps in the market. For instance, there is a lack of accommodation within Whitehaven and Maryport. A key gap in the market is the provision of high quality hotel accommodation for business and leisure tourists.

1.1.6 Public realm/tourist infrastructure

There are currently shortages of key visitor infrastructure. For instance, towns in West Cumbria lack the infrastructure required for a visitor economy (a high quality public realm, good standard toilets, cafes, shops).

2 Key projects

2.1 Key projects

There are a number major projects being progressed by local partners and the private sector. These have the potential to act as a catalyst to the development of the visitor offering in West Cumbria. There is no shortage of projects being taken forward in the region, which presents optimism that a step change may be possible over time. Individually these projects may produce incremental benefits, but with coordination and garnering private sector momentum, there is the potential for significant growth in the tourism industry overtime. These projects are at different stages of development. Projects include:

- Derwent Forest
- Derwent Valley Project
- redevelopment of Workington Town Centre
- Development of the Port of Workington (cruise terminal option)
- Maryport harbourside visitor attraction
- Cockermouth market redevelopment
- Lowca Valley (private sector)
- Hadrian's Wall
- Silloth
- Whitehaven regeneration
- Market Town Renewal Initiatives

There are a number of tourism strategies relevant to West Cumbria.

- North West Development Agency. The North West Development agency has nine core programmes. The first of these is the star brand approach. The focus is on the development of "attack" brands (ie. central lakes), with the Western Lakes forming a slipstream brand. The vision is for Hadrian's Wall to also reach attack brand status, with potential implications for roman sites and the Hadrian's Wall interpretative project along the west coast.

- Allerdale Borough Council. There are a number of strands to the Allerdale tourism strategy: the development of Derwent Forest as a catalyst to the enhancement of visitor economies in West Cumbria; active tourism through the development of cycle paths; Destination Maryport and other programmes as outlined above to improve Maryport's offering; Hadrian's wall and roman ruins

- Copeland Borough Council. The New Copeland Economic Strategy and Action Plan contained a number of actions for tourism including: Whitehaven coastal fringe, Industrial safari feasibility study. Roman Cycleway, Cycle hub feasibility. Whitehaven Tall Ships, Circular Cumbria Rail Trail Feasibility Study, Marketing Steam Railway

- Silloth AONB. The strategic management plan (2004-2009) contains a range of initiatives to produce outputs to assist the enjoyment of Silloth all year round. Themes include passive leisure (walking, birdwatching, horseriding, windsurfing) - including guides for walks, flowers, birdwatching, environmental management and combating erosion, Hadrian's Wall (including the reconstruction of Mile fort 21 and interpretation at various sites of interest), signposting of points of interest (eg. Maryport, Whitehaven) and traffic management.

In addition, Allerdale BC commissioned BDP to undertake the West Allerdale Regeneration Strategy. The covers the development of Workington and Maryport. That study determined that Maryport was the key town for the development of tourism and housing for nearby workers, and Workington a key centre for enterprise and retail. A business plan has been developed for Project Columbus - The Tall Ships in Whitehaven.

There are also a number of projects in the pipeline that have the potential to catalyse an increase in tourist numbers and therefore an improvement in the visitor economy. This will be important both for attracting tourists, but also attracting and retaining businesses and their workers. Below we discuss a number of these developments that could have significant impact on the West Cumbria visitor economy.

2.1.1 Derwent Forest

Derwent Forest is considered to be a key project to develop the visitor economy of West Cumbria. The 1,050 acre site at Broughton Moor was formally the Royal Naval Armaments Depot. It is positioned between Maryport, Workington and Cockermouth providing excellent access to West Cumbria. The site is contaminated and decontaminating the site is the first step in the process of the development. Funding is being sought from the NWDA in order to undertake this decontamination and release the site for private sector development. The site contains one third of all derelict land in West Cumbria.

The nature of the development is still being determined, with a number of expressions of interest received from the private sector. At this point in time, the development of Derwent Forest could involve both the development of second homes in a parkland setting, as well as the development of a PGA championship golf course with associated club house, hotel and conference centre. There would also be an element of high quality public open space with marked walking and cycling pathways to enhance the leisure offering for local residents.

A development at Derwent Forest would be strategically important in placing a visitor market at the edge of the West Cumbria coastal strip. Therefore the project has the potential to provide the impetus to the development and enhancement of nearby towns, such as Whitehaven and Maryport.

2.1.2 Destination Maryport/Harbourside development

The development of an additional attraction at Maryport is likely to provide a critical mass for the town. Destination Maryport involves the development of a concert centre on Maryport Harbour. Current plans include the development of a heritage attraction within the centre, as well as tourist information.

A key issue for the town is a lack of accommodation. Maryport Regeneration is hoping to attract a number of new hotels to the town centre and harbour. There is also some interest in the development of cafes in the town.

Work is also being undertaken on developing gateways to the town and developing pathways to attractions (including the Senhouse Museum). Cycle ways are being developed to provide additional active options for visitors.

2.1.3 Hadrian's Wall/Roman Heritage

The world heritage area of Hadrian's Wall extends south to Maryport (covering historically significant roman forts extending down the coast from Bowness-on-Solway to Maryport). There are also isolated sites covered by the listing, and these include the dramatically positioned Hardknott Fort near Ravensglass.

In Maryport, there are plans to link the marina with the Senhouse museum through a boardwalk. A decision is being made on this proposal on Monday 19 June. The museum itself needs to be upgraded, and there are proposals to enhance the display. There are also plans for the trust to purchase adjacent land and undertake an archaeological excavation of the site (which is undiscovered and potentially has important roman artefacts and structures).

Linked to this are plans to reconstruct the Mile Fort 21, 3 kms north of the Senhouse Museum. This attraction would be linked to Senhouse by footpath, and a lookout at Senhouse would provide a view of the reconstructed fort. Plans include a circular walk and cycle way to assist visitors to experience the site.

Together these attractions at Maryport create a potential critical mass of activities to attract visitors to the town. With accommodation, and café options in place, Maryport's visitor economy has potential for development.

2.1.4 Market Town Initiatives (MTIs)

These initiatives have been improving the physical environment of key market towns within West Cumbria.

Cockermouth is a key town with an attractive setting, as well as historical sites, including Wordsworth's birthplace. A proposal is being developed to renovate the historic market square for the town. This would provide an additional central attraction for the town.

Both Egremont and Millom MTIs have tourism action plans, which are designed to attract higher numbers of visitors to these towns.

2.1.5 Whitehaven

There are a number of initiatives within Whitehaven that have the potential to add to the visitor experience.

Branded accommodation has been identified as a key need, and Copeland Council and funding agencies have been working with the owner of key sites on the harbouriside to progress this issue.

A funding package is being sought to undertake a major redevelopment of the Beacon. The redevelopment will involve increasing the collections on display, providing better interpretive displays and presentations and widening public access. The redevelopment will involve the development of improved educational programmes and facilities.

The reconnection of the town centre and the harbour is a priority. Expansion of the harbour itself is the subject of on-going work. Providing a permanent base for Tall Ships has been the subject of a study "Project Columbus", although funding was not secured for this attraction and the ships have been sold. There are some discussions with the new owner to secure use of the ships at key times.

The development of the Haig Colliery Mining Museum (phase 2 development to the value of £4.1m) could provide a community facility and showcase the industrial heritage in a dramatic location overlooking the ocean. The site's lack of connection with the marina has led to suggestions for a train or funicular to take visitors from the marina to the museum.

The redevelopment and regeneration of the Whitehaven coastal fringe area is being progressed by West Lakes Renaissance and English Partnerships. There is the need for the development of land south of the harbour to the Museum to improve the public realm in this area, and make more of the coast. The development of paths around the harbour and a coastal walk to St Bees will assist in providing access to the coast.

2.1.6 Lowca Leisure Village

A private developer has expressed interest in developing a holiday and leisure scheme at Lowca, which would provide an idea base for exploring the west coast of Cumbria. The estimated capital value is around £90m.

2.2 Key tourism issues

There are a number of interlinked issues limiting the potential of the tourism industry in West Cumbria. These have emerged from the review of strategy documents, as well as consultations with private and public players in the region. The key issues are summarised below:

- West Cumbria has a low profile, and information and branding is limited/ineffectual;
- there is a lack of accommodation, and day visitors predominate;
- the tourism product requires development: there is the potential for the development of the "honeypot" destinations but these require public realm improvements and are lacking some of the basic visitor infrastructure;
- the region is relatively isolated, and access to the region is difficult. Public transport is limited, particularly for tourists - for instance the west coast rail line does not run on a Sunday;
- securing funding can be difficult given the myriad of partners involved in projects and the different output requirements of partners; and
- quality and customer service can be patchy.

These issues are broadly consistent with the findings of a survey of 300 tourism-related businesses in Allerdale in January 2005 by Allerdale Borough Council. The following themes were identified for the Council:

– basic infrastructure, such as car parks, toilets and signage;
– branding and marketing;
– lobbying to attract investment and raise the profile of the area;
– strategic project development, such as the development of Derwent Forest;
– an overall high-quality tourism experience;
– a single point of contact for the industry at Allerdale Borough Council
– Tourist information centres

2.2.1 Profile, branding and marketing

The key tourism issue for West Cumbria is attracting tourists west of Keswick.

The western lakes have a low profile. The attractions do attract visitors, but the visits are often undertaken on a day trip basis from elsewhere in the Lakes. A key issue is a lack of accommodation to attract overnight visits.

There is no distinct branding for the Western Lakes and coast. This lack of branding is a key issue in attracting staying visitors. According to consultations, this has improved somewhat, but the area is still relatively unknown.

The region has an industrial heritage, linked to the coal and steel industries, now the nuclear industry. This is somewhat at odds with the pristine environment on the region's doorstep.

Most marketing efforts are through the Cumbria Tourist Board. Some operators felt that the marketing of West Cumbria did not create a distinct brand for the Western Lakes. In addition, concern was expressed at the way in which accommodation in the Western Lakes was promoted, with the perception that areas to the north and west of the central lakes are only promoted when accommodation in the south is fully booked.

However, few accommodation providers outside of Keswick market through the CTB, and as a result the region is not a focus for their efforts. Search functions on the CTB website for West Cumbria highlight Keswick, with accommodation options to the west of Keswick contained in the listings numbers 130-162 ie. at the back of the directory. Local operators instead use the Western Lake District listing facility.

Also an issue is the signage to the western lakes and the major attractions in the region. Distance between the attractions and the relative isolation mean that the existing AA signage guidelines (5 mile limit on signing) do not enable a clear signposting to attractions in the region. Innovative ways of improving signage is required.

2.2.2 Transport/accessibility

West Cumbria's geographic location at the western edge of the lake district presents a challenge enticing people to the region. This is made more difficult by transport links both to the region and within it. Road congestion around certain times is an issue.

Train services around the west coast are infrequent and do not cater for the tourism market, with no Sunday service. This limits the appeal of the region to visitors relying on public transport. Links between train stations and town centres are poor and often unattractive. Train stations themselves do not create a welcoming gateway to the coastal towns. There is the potential for the line itself to become an attraction, with dramatic scenery in parts, or provide a service for walkers undertaking coastal walks. However, the limited weekend service reduces this potential. There are no sidings on the line and this prevents the line being used to host visitor attractions.

To service business travellers and the business conference market air links to the region must be considered. However, regions to the north and south of the lakes are well served by air links limiting catchment areas for scheduled flights.

2.2.3 Public realm/visitor infrastructure (especially accommodation)

As well as raising the profile of the region and improving its accessibility, key to developing the visitor economy will be improving the visitor product. Only with a good quality product will a sustainable industry be created.

Accommodation is the most important issue in this regard. A broad range of accommodation is required for every visitor destination (both in terms of price and quality) insufficient quantum. Currently in West Cumbria there is a shortage of high quality accommodation. Therefore, there is a need to introduce new good quality developments as well as upgrade existing stock. While developer interest is being shown in the region, one barrier is the lower commercial returns from hotel development compared with residential development. There is also a greater risk from hotel development in an emerging tourist market as opposed to residential development where returns have been proven.

As well as accommodation for leisure visitors, the offering for business travellers is limited. The enhancement of the business tourism offering (accommodation and conference facilities) will improve the ability of the region to attract new businesses and their staff.

Staff within hotels must have the right training and approach to create a welcoming and positive visitor experience.

The public realm in West Cumbria is poor in areas, and certainly not as strong as in other Lake District towns. Progress is being made through renewal initiatives as well as public art. There is a need to develop the full range of infrastructure for a visitor economy (including for coach stops), including cafes, restaurants, public toilets, gift shops.

The creative potential of towns in the region, particularly Maryport should be exploited (potentially through a market) to enhance the visitor offering.

There has been a lack of private investment in West Cumbria. However, there has been some private sector interest being shown more recently. In particular, the private sector is showing interest in developing golf and hotel facilities, and a holiday package at Derwent Forest, accommodation in Maryport, a leisure village near Lowca.

2.2.4 Quality and customer service

Expectations of quality in the tourism industry have risen and providing that quality is a challenge to all businesses in Cumbria. Consultations suggest that there is the potential for improvement in the quality of the tourism offering and levels of customer service in West Cumbria. This is exacerbated by the prevalence of small lifestyle businesses, limited staff training and motivation and the low returns from upgrading the physical quality of the offering.

Low wages and low status is perceived as a barrier to encouraging excellence in the industry and entrepreneurial reluctance more generally, a barrier to new entry. As can be the case with small businesses across all sectors, generic issues such as limited career progression, limited delegation and trust can impede job satisfaction.

2.2.5 Industrial legacy

The region's industrial heritage is both a positive and a negative for the region. It provides a point of interest for tourists. However, it is also an issue for the perception of the region and the legacy of a number of derelict industrial sites reduce the appeal of the region. These include the former Albright and Wilson site south west of Whitehaven, the site of steel and railways manufacturing at Workinton, Glatton industry estate in Maryport.

Some of these sites reduce access to the coastline and detract from its attractiveness.

However, their remediation will potentially involve considerable expense, with significant decontamination issues at the sites.

2.3 Opportunities

In many respects, the visitor economy in West Cumbria is starting from a low base, with considerable potential for development.

2.3.1 Using natural and heritage features

West Cumbria has impressive natural scenery with picturesque western lakes, coastal scenery, areas of natural beauty (AONB), historic and attractive towns and heritage sites. The region also hosts a number of festivals that attract visitors, and provide a platform for developing the region's profile.

Roman heritage and ruins provide a feature that can be exploited. Hadrian's Wall has become a prominent attraction and there is an opportunity to promote the roman features and heritage in West Cumbria.

There is an opportunity to improve access to the coast and to make more of the coastal features.

2.3.2 Accommodation development

There is currently private sector interest in developing accommodation - more interest than has been the case to date. The development of accommodation would enable an improved offering to leisure and business visitors.

There is currently gap in the provision of business accommodation and conference facilities. Decommissioning at Sellafield presents opportunities for developing an offering for business visitors. High quality hotels in town centres could provide a dual business and leisure quality hotel offering.

2.3.3 Transformational projects

A project such as Derwent Forest will provide an opportunity for a step change in tourism for West Cumbria. Key to the potential impact of the project is the prospect of a core of visitors on the divide between the lakes and the coast, providing a ready market of visitors. However, key to realising the potential will be attracting tourists to the towns in West Cumbria. A catalytical project will enable incremental improvements to gain momentum and achieve private sector buy-in. This momentum is crucial to developing the product in order to retain day visitors in the region.

Businesses within Whitehaven have responded positively to opportunities presented by a greater number of office workers within the town by increasing the number of day-time cafes in operation. This suggests that an increase in visitor numbers may have the impact of increasing the number of tourist shops and restaurants.

Other transformational projects, such as another Eden Project, have been mooted. Mixed feedback was received from consultees about the need for a flagship attraction. As noted above, the region currently has a large number of successful attractions, and a large number of visitors passing through the region rather than staying within the region. A flagship project may not change this issue. Instead, developing the quality of the environment may have a bigger impact on retaining visitors.

2.3.4 Drawing visitors west

There is a market of visitors at the central lakes, as well as in Carlisle (which is expected to grow given the city's ambitious development plans) and there is an opportunity to attract them for staying visits. One way of doing this is to develop "stepping stones" from the central lakes to the west coast, and developing a "string of pearls" along the coast.

Developing these stepping-stones and string of pearls involves incremental development of towns, activities and attractions.

This was backed up by a number of consultees who thought that the existing attractions should be developed and improved, alongside of improvements to the public realm and core visitor infrastructure. Providing a range of visitor experiences, for instance, cafes, shops and attractions may be the most effective way of building a quality environment for tourism and leisure.

Improving the quality of existing attractions and adding to the attractions in an incremental way will also enhance the visitor experience, particularly for repeat visitors to the region. Potential examples of enhancements include the Tall Ships at Whitehaven. Destination Maryport will also enhance Maryport's tourism offering.

Practical ways of attracting visitors to West Cumbria could include developing itineraries for the West Coast for different visitors - families and active visitors.

2.3.5 Trends in visitor patterns

Short breaks are becoming increasingly popular at the expense of mid- and longer breaks. Short breaks are more likely to use serviced accommodation.

Areas more remote, such as West Cumbria, face an additional challenge in attracting short break visitors.

Leisure tourism has been identified by the Cumbria Tourist Board as a growth market. The region has been developing cycle ways and marking walking trails to improve the visitor offering in this regard. The region is the beginning or end point for a number of cross-country trails. Bowness-on-Solway is the start of Hadrian's Way, St Bees is the start of the coast-to-coast walk, whilst cyclists begin the sea-to-sea path at Whitehaven. A number of walking and cycle paths are being developed down the coast, including a number of round walks and cycle paths. Providing information on marked trails, and improving the public realm in these areas, would help to attract walkers to the region.

In addition, the Locum Forecast Report suggested that the conference market was one with the potential for strong growth going forward. Key requirements to tap into this market will include accommodation, conference facilities and transport. All elements are currently missing and so a step change will be needed to capture this potential opportunity. Derwent Forest may provide this step change.

3 Review of Derwent Forest

3.1 Introduction

West Lakes Renaissance and other partners have been engaged on progressing development on the above site for a number of years. The Partners have consulted extensively with the West Cumbria community, pubic and private sectors and produced a range of masterplan options to elicit the interest of the private sector. Currently, there are no substantive expressions of interest although a number of private sector operators have made contact with West Lakes Renaissance and others over this period and submitted various preliminary plans and brochures.

Derwent Forest is considered to be an important component of the overall visitor development strategy for West Cumbria. The 1,000 acre site at Broughton Moor, positioned between Maryport, Workington and Cockermouth, was formerly the Royal Naval Armaments Deport. The site contains one third of all derelict land in West Cumbria, but is contaminated and extensive remedial work will be the first step in the development process. In order to encourage private sector interest and progress strategic development options, funding is required from NWDA and others to undertake these decontamination works.

3.2 The Site and Masterplan

The site at Broughton Moor is situated mid-way between the boundary of the National Park to the east and the coast to the west. The A66 linking West Cumbria to the M6 is two miles to the south and nearby is the A595, which links the area to Carlisle around 45 minutes drive away. Workington, Maryport and Cockermouth are all within a 4-5 mile radius of the site.

The Masterplan and subsequent prospectus issued by Donaldsons essentially cover the same ground, although the initial estimate of £25m public infrastructure works funding has now been revised to around £10m, essentially to include only contamination and building removal works (site access from the main road and within the site are now excluded).

The Partners have been working closely with the Forestry Commission and other interests to ensure that all environmental considerations are accommodated and that best practice measures are used to restore the site so woodland and wildlife can be encouraged. Various wildlife (bats, great crested newts) will need to be protected and English Nature will retain a keen interest on all development proposals.

The Masterplan has evolved in recent years and has striven to allocate areas for a variety of outdoor leisure uses whilst also restoring and promoting the site's natural habitat and wildlife. Development plans suggested in the prospectus include:

- Establishment of routes for cycling, mountain biking, horse riding and walking.
- Reinstatement of hedges, grassland and heath areas to provide habitat for birds, bats and new forest trails.
- Provision for a championship standard golf facility.
- An events field and equestrian area

- A 3 acre multi-use area for quad biking, paint-balling and other such activities, and

- A Visitor Centre providing gateway facilities together with interpretive displays to promote the history, wild life and activities available at Derwent Forest.

The prospectus then details the various options by splitting the site into six (e.g. Buck Hill, Brick Oven sites) indicating the size and configuration of each site, potential uses, access and particular constraints (e.g. golf facility, holiday accommodation, visitor attraction). Following publication of the prospectus, a market testing exercise indicated the following site propositions:

- Two futuristic visitor and learning experience attractions

- Hotel and spa complex

- World class sports training facility

- Two University proposals

- A wild animal park

- A number of renewable energy schemes.

West Lakes Renaissance have subsequently met with a number of interested parties since that time to try and establish the seriousness of their intentions and try and progress the more realistic ones amongst them.

3.3 Current Proposals

It has naturally been difficult, if not impossible, to obtain detailed proposals from interested parties in the absence of public sector commitment to undertake the requisite remedial works; indeed, to expect them to go to the expense of providing independent and objective studies or business plans without the certainty of knowing that these essential works will be completed is not realistic. Consequently, there is little to appraise at this juncture. A number of proposals have been discussed with West Lakes Renaissance more recently, but again the expectation is that the public sector interests will need to demonstrate their commitment initially. The following proposals are still “live”.

3.3.1 The Guy Hindley Group’s Proposal

This involves the group who developed the Langdale Development in Windermere in the early 1980s (timeshare lodges and apartments for purchase/self-catering rental and hotel/conference facility). Their proposals for Derwent Forest encompass a total of 250 – 330 holiday homes for sale or rental on two sites and a Visitor/Eco-Centre on site. Total build cost is suggested as £4m.

3.3.2 Utropia

Promoted by a West Cumbrian resident, Nigel Catterson, Utropia has been conceived and developed over the past four years. It seeks to utilise the whole site, and comprises five key components:

- Environmental Sciences Innovation Centre

- Eco Hamlet
- Learning Centre
- The Experience (visitor attraction), and
- The Wider Experience (including accommodation, conference facility, outdoor pursuits and training, organic farm, arts and festival spaces).

Utropia suggests it is “a model of sustainable living, working and being, also representing a place, process and system change……… All aspects of the development will be geared towards demonstrating sustainability….and is governed by a set of key foundation principles”. Currently a limited company, Utropia intends to evolve into a Community Interest Company.

The Environmental Sciences Innovation Centre will provide a base for companies in the area involved in the market of sustainable and renewable technologies to co-operate and share in development.

The Eco Hamlet will be a mixed development of 120 homes (for rent and purchase) directly linked to the existing village of Broughton Moor. The Hamlet would be developed with a district-heating scheme and would model best sustainable building practice.

The Learning Centre would embrace a wide range of new courses at HE and FE levels as well as catering for visiting schools at both primary and secondary levels. A National Centre for Landscape and the Environment would hope to be established and come under the umbrella of the new University of Cumbria.

The Experience will be a visitor attraction, based on the four elements of air, water, fire and earth (identical to the existing Magna Centre attraction in Rotherham) and man’s relationship and connection to them.

Other tourism and leisure aspects will include a 200 bed eco-hotel, together with self-catering lodges and campsites; conference facilities, outdoor pursuit areas; performing arts space and organic farm. Further details on these aspects have not been provided.

It is understood that the project sponsors are working closely with one of the UK’s largest commercial developers to progress the proposal and a business plan is the next step to be taken.

Two other schemes exist, for which no details have been provided, and they are:

- A championship standard golf course with associated leisure and accommodation elements, and
- A Cumbria Sports Village, including facilities for elite training and endurance sports.

3.4 Conclusion

In the absence of more detailed project descriptions, figures, costs, visitor numbers and income and expenditure projections, it is impossible to quantify the advantages, risks and benefits to West Cumbria. We understand that the golf proposal may be submitting further details shortly. The Utropia proposal, which we understand is more developed than these other schemes, still requires an assessment to quantify the market, financial, funding and construction implications. As indicated, we have been informed that this will be the next element to be progressed.

4 Review of major attractions

4.1 Major leisure attractions

4.1.1 Regeneration role

"Leisure attractions", whether they are stand-alone icons, such as The Eden Centre in Cornwall, or accommodation-based "destinations" such as Center Parcs, can bring significant economic benefits to a sub-region, or help to generally lift the profile of the area in which they are located. However, such "icon" developments are the exception rather than the rule. If we consider the major developments in the past twenty years, such as Alton Towers, The Eden Centre, Jorvik Viking Centre or Center Parcs, which have helped to regenerate the particular area they are located in, there are a variety of features and essential requirements for success. These are discussed later in section 2.4 but amongst their USP's are "uniqueness", "location", "access", an excellent "catchment" population within a reasonable drive-time, or an existing holiday market in the area.

4.1.2 Key features

A major leisure destination will need to offer a variety of features if it is to maintain its initial success and remain viable in the future. If we discount the UK's major theme park Alton Towers (that has been developed over a period of 30 years and requires constant major re-investment in rides), it is difficult to think of many developments that are purely leisure-related, succeeding in remote rural or coastal areas of the country.

The Eden Centre and Center Parcs notwithstanding, all other "destination" projects whether they are visitor attractions, golf courses or others, if they are lacking the components described in section 2.1, will need other commercial features to sustain them or mitigate the front-end risk of the project. Alton Towers is now adding to its offer to appeal to more markets and prolong visitor stay – the development of a water park, conference and spa facilities and two 200 bed hotels means it is now branded as a "resort", mimicking Disney and Universal in the US. Unlike the attraction, the accommodation is open all the year round.

In the 1980s, golf courses were the latest phenomenon to hit the UK and it seemed that every available area of greenery in England (especially the M4 corridor) and Scotland was destined for golf development. However, it soon became apparent that failure to obtain planning permission for executive housing adjacent to the golf course rendered the leisure development unviable and a number of spectacular failures were recorded throughout the UK.

Current major leisure destinations in existence or planned also seek to "spread the risk" referred to earlier. They are either co-located with other retail or shopping facilities (for example, Xscape in Milton Keynes or Castleford) or as in most of the proposed major casino developments, are planned with extensive other leisure, retail, office or housing facilities adjacent to that core attraction.

In summary, history has shown that relying on the leisure market alone will be an extremely risky venture for any "major leisure destination".

4.2 Does West Cumbria Need a Major Leisure Destination?

In recent years, Cumbria's overall share of the tourism market has fallen. Consequently, even the "honeypot" destinations such as Windermere, Kendal and Keswick have struggled to maintain their attraction against the various foreign and domestic competition which, nowadays, is increasingly accessible to all markets. If central Lakeland's market share is struggling to remain constant, West Cumbria which cannot rely solely on its immediate hinterland for its day and staying visitors, is, and will be, similarly disadvantaged.

As to whether West Cumbria "needs" a major leisure destination, such a question is much more difficult to answer. West Cumbria is seeking reasonably immediate transformational change and remedial action to redress the economic problems it will shortly face. Leisure or tourism cannot be seen in isolation as an answer to these imminent problems. However, tourism is important for Cumbria and the western sub-region also has existing natural tourism and leisure assets that are not currently being exploited. For example, Carlisle has increased its profile recently following the Hadrian's Wall initiative (which will also help West Cumbria), Maryport, Whitehaven and Workington have a number of development proposals that are in the process of being evaluated and Derwent Forest has obvious potential.

What is required to stimulate these existing and future projects is a catalyst that will increase business and leisure tourism to the sub-region and generally increase the attraction and profile of this part of Cumbria. It will be difficult to persuade visitors to central Lakeland to travel west of Keswick without any compelling reasons to do so and additionally the ambition eventually must be to attract visitors to West Cumbria in their own right, rather than merely obtaining a share of the central Lakeland market. In order to do this, a major leisure destination project will be required, as the refurbishment/extensions or additions to the offer at existing towns will not in themselves be of sufficient scale to provide the "step-change" that is required.
In tandem with the transport and infrastructure improvements that are being discussed and public realm improvements that are also essential, a major leisure destination in West Cumbria is required to:

a. generate new visitor and tourist demand, and

b. assist the other tourism and leisure assets in the sub-region to increase their own market share as a consequence of the area's enhanced profile.

4.3 Selected case studies

In order to plan and prepare any major leisure development initiative, it is important to consider the lessons that have been learnt from some major projects that failed and also the crucial factors in other projects' success. These are covered in Appendix A.

4.4 The need for an alternative anchor to Derwent Forest

Consideration needs to be given to the prospect of an additional or alternative anchor to Derwent Forest. If Derwent Forest is deemed to be too expensive or too difficult or protracted an exercise, then naturally other locations or developments will require active consideration.

However, at this stage of analysis, there is no need to opt for one or the other. There are no schemes that are sufficiently worked up to any level of detail to consider, so the best options are to allow the few serious ones to be progressed to a level where they can at least be appraised.

4.4.1 Corus Site Development Proposal

The end of production at the Corus steel plant on the sea edge in Workington has now produced an opportunity to develop a stretch of coastland to enhance the town's offer.

The National Museum of Science and Industry and Workington Regeneration have been working together on a vision for the existing Corus site. Workington is a steel town with a transport heritage, coal mining history and close association with energy (Sellafield) and wind farms. The Corus site is around 200 acres, with some new retail development to the south and potential residential and harbour-side development in its Eastern Quarter (A 400 berth marina and 400 housing scheme proposals exist). Buildings will be demolished and some contamination works will need to be undertaken.

The consultants have proposed the creation of a multi-use site, with a visitor attraction at its hub. The proposition is that the site will become a major UK destination, linked by the topic of energy. The site is to be known as The Powerhouse with facilities such as retail outlets, business park, cinema, housing, training and education/research centre. At the site's heart will be "The Hub", a visitor attraction.

None of these features have been explored or detailed further to indicate whether they are appropriate except for The Hub's themes which are:

- Energy Explorer – an indoor and outdoor interactive environment where visitors are encouraged to explore what energy is and where it originates.

- The living history of the coal and nuclear industries.

- How Energy was used in Workington in the past and how it may be used in the future, incorporating stories from locals and play-acting.

- Transport heritage area, including specially loaned objects from the National Railway Museum.

Work is at a very initial concept stage. The size of the attraction, complementary features, ancillary components, visitor numbers or cost estimates have yet to be established.

4.4.2 Other Alternatives

Another suggestion that has been proposed is that of a coastal park for West Cumbria to make the coast a much bigger attraction. A parallel could be made with the Millennium Coastal Park in Llanelli, West Wales, which overlooks the Gower Peninsula, on the Burry estuary.

The coastal park began as an attempt to regenerate nearly 14 miles and 2,000 acres of contaminated and neglected industrial wasteland and coastal plain. It links Pembrey Country Park in the west to the National Wetlands Centre of Wales, in the east.

This £30m Millennium Commission assisted project, which opened in 2002, also attracted funding from the Welsh Development Agency and County Council and was the biggest land reclamation project in Great Britain. The area was already a popular one prior to this project being undertaken (attracting around 0.5m annual visitors), but the Coastal Park, which includes a series of major visitor attractions linked together by continuous off-road cycle ways and footpaths, hopes to double visitor numbers in the short to medium term.

Various other developments have resulted in recent years:

- The Forestry Commission has planted over 130,000 trees in the coastal park and a new community woodland has also been created.
- Land which had become almost derelict after 200 years of coal and steel production now offers cycle trails, six lakes, a marina and promenade.
- A £2m Visitor Centre opened in 2005 and a Jack Nicklaus-designed golf course is also now open.

4.4.3 Conclusion

Currently there are a few notional schemes for Derwent Forest, an initial concept design for a visitor attraction-based scheme at Workington and suggestions for a coastal park. No costs exist for any of these schemes. The basic remedial works at Derwent Forest will be at least £10m; the Corus Site attraction will, in all probability according to the consultants, cost at least £30m if it is to strive to be a "major" facility and any coastal park initiatives for West Cumbria will not be an insignificant cost, given the £30m spent in the earlier part of this decade on Llanelli's Millennium Coast Park.

4.5 Delivery issues for Derwent Forest/Alternative Anchor

Tourism strategies have failed to work previously despite there being a plethora of studies prepared. This may have been due to those schemes being difficult to fund and a lack of political will to support West Cumbria. As has already been discussed previously, tourism will not provide all of the answers to the region's future challenges. However, it will certainly have a role to play in helping to diversify the sub-region's economy. Improving the tourism or visitor infrastructure also assists in making towns and areas better places to live, work and invest. Attracting inward investment will be critical to the region's future economic development. Exemplars described earlier in the report such as The Eden Project and the Millennium Coastal Park in Wales, have proved this to be the case.

However, in both these examples, substantial public funding (largely from the Millennium Commission) enabled the projects to proceed. It could be argued that with the large existing tourism and leisure visits to Cornwall and proximity to major conurbations such as Swansea, he Millennium Commission's "risk" was mitigated to some appreciable degree.

No such comforts exist in West Cumbria. The Lake District's existing tourism and visitor economy is not increasing and consequently West Cumbria is also falling further behind in trying to secure its share.

It should be understood that a step-change in the sub-region's leisure and tourism provision is required if there is to be any chance of reversing this backward trend. Incremental projects that have been discussed recently, such as improving or upgrading hotels and new/extended museums, will not, in themselves, achieve the transformation needed. In addition to public realm improvements (signage, improving access etc), the public sector will need to adopt more demonstrable and committed actions to enable this change to take place. Lessons learnt from the past two decades from elsewhere in the UK, indicate that any development based purely on leisure or museums in this particularly fragile area will not only (more than likely) fail, but also not achieve the transformation and maximisation of economic benefits required. A great opportunity will therefore have been missed.

It should be appreciated that any development initiative at Derwent Forest must be contingent on the public sector interest committing at least £10m to enable minimum and essential remedial works to be undertaken. Should this fail to materialise soon, there is no prospect of any scheme being worked on or progressed. This is the stark choice that awaits

NWDA. Derwent Forest is fraught with difficulties, but so probably will most sites that become available in the area. As indicated, the level of public funding that will be required to provide a significant development at Workington's Corus site will be many millions, according to the current retained consultants. Although it is difficult to establish "outputs" as normally required, given the dearth of detail of any schemes currently being considered, the situation in West Cumbria is not normal and will therefore require a sea- change in thinking to extract public sector support and commitment. This sub-region is one of the most economically disadvantaged in the country, a position that will soon be exacerbated with the Sellafield job losses. Without significant initial expenditure, whether it is in Derwent Forest or Workington or elsewhere, the public sector's ambitions for West Cumbria's tourism and leisure provision and by implication, its future economic profile, will certainly not be realised.

It is therefore suggested that:

1. Consideration is given to say only three or four schemes that have a complementary mix of leisure, tourism, accommodation and commercial features and these be identified by the Partners immediately.

2. These projects be independently worked up with market, financial and funding analysis (these studies to be paid for by the public sector), and

3. In six month's time, these are then analysed and appraised by the Partners and the one scheme that demonstrates the greatest potential for initial and future viability, serving as a catalyst for other developments and maximising economic benefit, be selected.

5 Going forward

5.1 Emerging themes for tourism

In considering areas for intervention and action, key questions to ask are:

- what is going to draw more people to West Cumbria?
- how do you keep in the area for longer?
- how do you encourage them to spend more money in the area?

In order to address these issues, interventions in a range of areas are required. Together they have the potential to achieve substantial improvements in West Cumbria's visitor offering.

5.1.1 Transport/accessibility improvement

Transport improvements could be key facilitators of short break leisure visitors and the business conference market. Improvements to public transport (particularly the west coast line) could also assist tourists to explore the region.

Signage will also help improve accessibility to the region.

5.1.2 Development of visitor offering (including accommodation)

Development of stepping stone products from the central Lakes will enable a greater ease of accessibility and also develop a critical mass of visitor offerings for the area. Enhancing the visitor offering at each step will provide benefits to tourists and residents.

One issue in the past has been a fragmented approach to product development. The result has been a large number of towns with some limited improvements, but not a core of pristine towns welcoming for visitors. Coordination of the offering will enable the core features to be developed first, followed by secondary destinations with alternative offerings. Coordinated branding of the offering will also be important.

A key area of intervention will be facilitating the provision of accommodation, in particular higher quality branded accommodation - an identified gap. Derwent Forest, Whitehaven and Maryport are key sites. Using private and public sector support to leverage greater private sector investment in this area is key.

Getting the basics right, in terms of public realm and public toilet facilities at the key tourist towns will be essential. Enhancing the gateways to key tourist towns will be equally important. Improving and adding attractions and activities will also add to the visitor experience.

Exploiting strengths is important. For instance, creative talents in Maryport could be used to attract visitors to a craft market.

Derwent Forest will be a key project which could include the provision of conference facilities. Hotel developments in Whitehaven and Maryport may also assist provision for this market. The public sector needs to leverage investment into this market.

Improving the quality of the offering will contribute to the development of the visitor offering.

Innovative ways of delivering the "Welcome Host" programme in West Cumbria may enhance the visitor experience.

5.1.3 Branding and marketing

Improved branding and marketing of the region has the potential to raise the visitor profile of the region. An indirect benefit is an improved sense of place for local people.

There is a need for branding of the region, as well as the providing identities for the coastal towns. Clear branding of the region as well as themes within the region will provide a greater sense of identity.

For instance, Maryport provides a key visitor experience as a Roman port town with the potential to attract this visitor niche from Carlisle, Whitehaven is a marina and maritime centre, Cockermouth a market town, whilst Workington town centre provides a regional shopping experience. Silloth has the potential to become a high profile leisure and golf destination.

Individual attractions could also be branded for greater impact. For instance, Wast Water could be marketed as the "most dramatic lake in Lakeland". The distinctiveness and contrasts of the offering could also be marketed "Best of all worlds".

The existing festivals and events provide an additional opportunity for branding and marketing.

5.2 Potential programme areas and priorities

On the basis of the consultation conducted to date and research undertaken, there are a number of potential projects that would transform West Cumbria's visitor economy.

There is much happening already, but progress has been slow in some instances.

5.2.1 Transport/Accessibility

The transport workpackage has identified proposals for further consideration in the areas of:

- air transport (potentially developing a rail link to Manchester International);
- west coast rail line (Sunday service, passing points, tourist feature);
- connecting the Ravenglass and Eskdale Railway to the main railway line;
- roads - external links and internal congestion.

Signage is also a key issue for transport.

5.2.2 Accommodation

This will involve the facilitation of hotel developments in Whitehaven and Maryport to improve the range of accommodation products, and provide for business travellers.

In Whitehaven, actions to secure an accommodation offering are gaining momentum. This initiative must be progressed to secure the land for development, potentially use support from major employers in the region to guarantee occupancy, and negotiate with key hotel developers. A mixed-use development, for instance, including a residential component may have a dual benefit of improving the commerciality of the proposal and may increase housing market choice for residents.

There is considerable private sector interest for developments in Maryport and the required level public sector involvement may be limited. Some funding has been requested to kickstart hotel projects.

5.2.3 Public Realm/ Town redevelopment/Visitor economy offering

Currently the public realm is generally below that of other towns within the Lakes. While there have been some improvements, there is still a gap between what is there currently and what is required to create a premier visitor destination. Particularly important are gateways to towns (including from rail) and areas along the coast - arguably one of the region's key attractions.

As a first step, there must be a focus on developing the key attractions and tourist towns, which will provide stepping-stones to other destinations. The development and enhancement of attractions in Whitehaven (the Beacon, the coastal fringe, public realm), Maryport (Hadrian's Wall/Roman heritage, concert hall, walking paths) and Cockermouth (market) are key to improving the visitor product.

There is the need to develop key attractions and make improvements to public realm in an incremental way. These changes will encourage the development of visitor infrastructure such as cafes and shops, complementing the improvements to the attractions.

The other towns can be developed in an incremental way once more tourists are attracted to the area.

5.2.4 Key Projects

A major leisure magnet is needed to attract people to West Cumbria. This could be based on the natural environment (eg. a coastal park).

Derwent Forest may be of significant scale to attract visitation. It may also cater for the business conference market, diversify the region's offering. However, to take advantage of this market, is necessary to develop the product as outlined in point (2) above.

5.2.5 Branding/Marketing/Information

The branding for the region must be reviewed. The region must do more to raise its profile and the current brand may not be the best way of achieving this. Potential brands include those highlighting the leisure offering, the contrasting natural environment and the rich heritage.

A comprehensive information campaign is needed to attract visitors to the region. It will be important to consider ways of packaging the current attractions to encourage tourists to spend more time in the area.

5.3 Emerging priorities

A key priority for tourism is achieving the transformational projects that will be enablers to the broader development of the visitor economy. These projects will coexist with actions already being developed in West Cumbria. The priorities for transformational projects in West Cumbria are:

- Transport - easier access to the region

- Achieving existing transformational projects: Derwent Forest - creating a pool of potential visitors, Destination Maryport - as a catalyst to the development of the marina.

- Accommodation - provision for businesses and leisure travellers

- Branding and Marketing

These projects are designed to bring visitors. A concurrent set of projects, building on existing actions, will be needed to maximise their experience in the region:

- Basic infrastructure in honeypot locations

- Development of leisure projects, including signposting to walking and cycling paths

- site remediation to improve town gateways and access to the coast

5.4 Conclusions

There is much happening in West Cumbria to improve the visitor offering. These enhancements will benefit locals and tourists alike. There will be some critical projects that will help achieve a step change in the local industry.

The visitor economy in West Cumbria has potential to increase in value through the retention of greater number of visitors. There are large number of festivals and successful attractions in the region. Consultations suggest that improving the accommodation offering will be important to realising the benefit from greater visitor numbers.

In addition to the large projects, smaller projects developing the physical environment of key towns within West Cumbria will be equally as important.

Key priorities include giving the transformational projects the critical momentum they need to achieve progress. In addition to these, key requirements are:

- transport;
- accommodation;
- branding/marketing;
- delivery of key projects: for instance Derwent Forest
- physical environment/public realm, and the development of stepping stones

Appendix A: Selected case studies of major leisure developments

Case study 1: The Earth Centre, near Doncaster

The Earth Centre attraction was instigated and co-ordinated by the ex general manager and director of Greenpeace as long ago as 1990. A 400 acre site was found near Doncaster in South Yorkshire which had previously been a centre for coal mining. Initial work with infrastructure and landscaping began in 1994 and the following year the project was awarded substantial grant funding by the Millennium Commission for further development (£50m) and implementation, together with additional grants from ERDF, English Partnerships and various local authorities.

The eventual closure of the area's coalmines in the 1980s meant a loss of about 10,000 jobs. The Earth Centre therefore took on both the ecological challenge of restoring a devastated environment together with the social challenge of creating new jobs and helping to provide some sort of economic stability to the area. Amongst its aims was to show that "emerging sustainable technologies, products and services can be the engines of economic renewal". The Earth Centre encompassed a huge range of projects and initiatives, including the following:

- Planet Earth exhibitions
- Ecology Park and Gardens
- Wilderness Adventure Play Trail
- Water Works and Water Systems demonstrations, and
- Solar Canopy and Renewable Energy initiatives.

The development was phased with Planet Earth Galleries Café and education room and other facilities as part of the initial build After one year of operation, the Earth Centre closed due to poor visitor numbers and work then began on Phase Two, including the "Welcome" Building (housing a shop and conference centre), pirate ship, crazy golf and budget hotel, which re-opened the attraction in 2001. Yet again failure to achieve the budgeted visitor numbers and spend caused problems and the Earth Centre closed permanently in 2004.

Conclusion

The problems with this attraction were manifold:

- It was an attraction designed with the directors and sponsors in mind rather than the visiting public. Displays were unimaginative and not of sufficient interest. Interpretation was minimal.

- The location and signage was poor; visitors travelling by public transport had to go to Doncaster and then take another (not very good) train service to Conisbrough. Those arriving by car had to pay a higher admission fee to the attraction to discourage the use of car travel.

- The “Millennium” attraction was close to many other new projects in the area, all predicting similar levels of visitors e.g. Magna Centre (Rotherham), the National Pop Music Centre (Sheffield). There was an insufficient visitor market to service all three attractions and the Earth Centre and music attraction both closed.

Case study 2: National Botanic Garden of Wales (NBG)

The NBG combined the restoration of a major 18th Century landscape with a vast new greenhouse designed by Norman Foster. It was the first national botanic garden to be created in the new millennium. It exists to develop a national botanic garden dedicated to:

- the research and conservation of biodiversity

- its sustainable utilisation

- lifelong learning, and

- the enjoyment of the visitor.

The Garden opened in May 2000 at a cost of over £40m, funded by the Millennium Commission, the Welsh Development Agency and various other public authorities. It is located in Carmarthenshire, South West Wales, ten minutes from the M4 motorway. Swansea is 30 minutes and Cardiff one hour’s drive away. London is nearly four hour’s away by car, but Birmingham can be reached within three hours.

The 400 acre site has a variety of garden features, several important plan collections (many imported from across the world), an Art Gallery, shop and temporary exhibitions throughout the year.

In 2003 the attraction was on the brink of closure following a decline in visitor numbers and rising debts. It required a £1.3m grant from the Welsh Assembly, local council and Millennium Commission in 2004 to remain in business. It has since received a further lottery grant to fund a Tropical House.

Conclusion

The attraction has had a very chequered history since opening and has had to seek further grant assistance from its principal funders on a number of occasions. The problems have been:

- Original visitor numbers forecast 250,000 per annum by 2004; they have averaged around one third of that in the past few years.

- Carmarthenshire has not been a traditional tourist destination and this attraction has not been of sufficient appeal to redress that balance.

- The attraction's content does not have universal appeal and is not sufficiently interesting to draw visitors from outside the immediate hinterland.

- The NBG was supposedly the "jewel" to help regenerate this part of South West Wales. However, access problems, attraction content, perceived high prices (£7.50 for adults) suggest that permanent closure may still be a possible option in the new few years.

Case study 3: Center Parcs

The first Center Parcs holiday village opened near Nottingham in Sherwood Forest in 1987. On a 400 acre site in a highly attractive area of pine forest, the development comprised 600 bungalows, sub-tropical water park, sports and other games and a range of catering, shop and conference facilities. This initial development project spawned others in the UK at Elveden Forest in Suffolk, Longleat in Wiltshire and more recently in 2001, the acquisition from Rank and subsequent conversion to the UK's fourth park at Whinfell Forest, near Penrith.

At the time of the development, there was significant growth in the UK's self-catering and short-break market, which still exists today. Center Parcs was considered to be the leading exponent of quality holiday operations in Europe (along with the more expensive, largely beach resort-located Club Med). With a successful track record in Holland and Belgium and with the majority of visitors staying in the park for short breaks in spring, autumn and winter, the blueprint for success had been established prior to the company's entry into the UK.

Sites were chosen for their quality and attraction, motorway access and proximity to major conurbations (within two hours drive of large cities). The company has gone through a variety of ownerships from a private limited company based in Holland, to the brewers, Scottish and Newcastle, Pierre et Vacances and now the venture capital firm, the Blackstone Group. Its success, both on the Continent (France, Belgium, Germany and Holland) and in the UK, where around 1.5 million visitors stay at the four parks each year, has continued unabated over most of the past two decades.

Further attempts to maximise the brand opportunity and develop further in the UK have, however, not been successful. In recent years proposals for Lyminge Forest, near Folkestone and Warren Wood near Woburn, Bedfordshire have been refused planning permission. Reasons for this resistance have been given as "blighting" Green Belt or AONB land and lack of economic benefit to the local area.

Conclusions

- Center Parcs is a unique and unqualified success story, regularly experiencing over 95% occupancy at its four English parks.

- The level of investment required (+£100m) for each site is a massive undertaking, but with the backing of successive private equity firms, does not appear to be a problem. However, further expansion in England would appear to be more difficult, not only because of the potential for protracted planning objections and delays, but also because of the potential for cannibalisation with existing sites.

- The proximity of Center Parcs to any prospective self-catering development would make it very difficult for the latter to operate successfully. The UK's leading self-catering holiday park operator with 20 years of successful trading, over 100 different activities on site and a quality product, will dwarf any other development nearby.

- The company has maintained that the advent of a Center Parcs holiday village will help to regenerate that particular rural area and provide major economic benefits. Whilst it is true that the (temporary) creation of construction jobs and permanent creation of holiday village posts is a benefit, the wider economic advantages have not been proven. When the parks first opened the on-site catering was minimal. However, nowadays, most parks have a range of food and beverage, restaurant and supermarket facilities available. As a consequence, the benefit to local outlets has been negligible, as most visitors tend to stay on site.

Case study 4: The Eden Project

The Eden Project opened in March 2001 and since then nearly seven million visitors have been to the attraction, which is based near to St Austell, in Cornwall. It is easily accessible from both the A30 and A38, the main routes through Cornwall and St Austell station (situated just outside the centre) is one of the county's busiest stations with direct services to London, Wales and the north. Developed from redundant china clay pits, it is an educational and informative "theme park" based on more than one million plants representing 5,000 species from across the world. Many of these can exist in the Cornish climate and others are housed in two gigantic Biomes – the largest conservatories in the world. The idea is to tell the story of plants, their importance to man and how much our food, clothes, shelter and medicines come from the plant world.

The displays, interpretation, unique setting and location has have helped The Eden Project, which has now cost over £130m, to succeed. It is one of the most successful (in terms of visitor numbers) paid attractions in the UK.

Conclusions

- The majority of financing for initial and ongoing capital expenditure has come from the public purse e.g. ERDF, the Millennium Commission and local authorities. The design and subject matter was and still is unique; attempts to replicate the attraction have been formulated elsewhere in the UK, though none have emerged.

- The South West is the most popular holiday area in the UK with Devon and Cornwall responsible for nearly 14% of all long stay visits in England; as a consequence, attractions such as The Eden Project and the Tate Gallery at St. Ives thrive as quality attractions to visit, particularly in inclement weather.

- Many other "environmental or sustainable" themed attractions have failed as they have tended to talk to the "environmentally literate". Where The Eden Project has succeeded is to engage all sectors of the community and age groups; 27,000 school children and 45,000 university/college students visited the facility last year. It is enjoyable, whilst also being didactic.

- Compared to many other major leisure projects, The Eden Project provides significant benefits to the local economy. By 2006 Eden had contributed £700m to the local economy. Eden employs 400 staff, 90% of which live within a 20 mile radius; over 60% of its purchasing budget is spent in Cornwall and over 0.5 million holiday visitors said their trip to Cornwall was influenced by Eden's existence.