

The volume and value of tourism in the HS2 corridor of the Chilterns AONB



A baseline study

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Contributors and dedication

Dedication

This report is dedicated to Shirley Judges, (1949-2014), a passionate supporter and ardent protector of the Chilterns Area of Outstanding Natural Beauty. Without Shirley's infectious enthusiasm this project would not have happened. Shirley gave unstintingly of her time and energy to protect the area she loved from HS2, but she also knew the importance of assembling robust evidence, using recognised research methods and arming oneself with the relevant facts and figures to fight a cause. Drive and determination had to be matched by the evidence. Shirley wanted a proper baseline study on the value of tourism threatened by HS2. . At her specific request we raised the money and commissioned Tourism South East, a specialist tourist organisation with a research arm, to undertake the study. The Chilterns Conservation Board, where Shirley had been a dedicated board member for 10 years, kindly agreed to manage the project.

Shirley's wish was to petition to the Select Committee. Through this report she will.

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- Wendover Action Group
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1 Executive summary

1.1 Study objectives

1.1.1 TSE Research was commissioned by the Chilterns Conservation Board, on behalf of a number of Parish Councils and local community groups, to undertake a study to quantify the economic contribution made by visitors to the economy of the Chilterns Area of Outstanding Natural Beauty (AONB) which will be affected during the construction phase and operation of HS2.

1.1.2 The study involved an audit of the main tourism assets within and close to the HS2 corridor area in the AONB including a review of the number of businesses in the area which rely on visitors from outside the area for a significant proportion of their trade. Data was also gathered on accommodation bed stocks and occupancy rates and visitor footfall at visitor attractions, where available. County level tourism statistics and national tourism surveys were also used.

1.2 Study headline results

Annual visitor volume (estimate based on 2013)

Total visitors staying in commercial accommodation	64,700
Total visitors staying in home of friend/relative	65,000
Total overnight visitors	129,700
Visiting for the day	2,227,000
Total visitor numbers	2,356,700

Just over 2.3 million tourists visited the HS2 Corridor area of the Chilterns AONB in 2013

Annual visitor expenditure (estimate based on 2013)

Total visitors staying in commercial accommodation	£17,343,000
Total visitors staying in home of friend/relative	£9,062,000
Total overnight visitors	£26,659,000
Visiting for the day	£44,650,000
Total visitor expenditure	£71,309,000

Tourism activity generated £79.76 million through direct and multiplier impacts

Annual local impacts (estimate based on 2013)

Total income generated for local businesses (see note)	£79,761,000
Total jobs supported (see note)	2,768

Note: Following adjustments and addition of multiplier

Tourism expenditure supports an estimated 2,768 jobs in the area

1.2.1 The HS2 Corridor makes up just over a fifth of the AONB in size, and the Study suggests it accounts for a similar proportion of the visitors that come to the AONB (2.3m of over 10million).

1.2.2 This study does not estimate the impact of HS2, but shows that the tourism that is at risk amounts to about £80m per annum. This figure also excludes the income generated by local visitors to tourist attractions etc who are already residents of the AONB. Our estimates indicate that a further 2.2 million visits a year are made by local residents who spend a further £14.2m a year (£25m with multiplier effects) on local goods and services during their recreational visits (See Appendix 1 for comparison of 2014 figures with the previous 2007 AONB study).

2 Introduction

2.1 Background to study

- 2.1.1 High Speed Rail 2 (HS2), as currently proposed, will pass through the widest part of the Chilterns Area of Outstanding Natural Beauty (AONB). Over half the route in the AONB is not planned to be in a deep bored tunnel. Its construction is expected to be lengthy (over 7 years), disruptive, and is expected to have a lasting impact on the landscape, network of footpaths and tranquillity of many areas for many years. Robust evidence of the economic importance of tourism in the affected area is required to form a baseline from which subsequent monitoring of the impact of the construction and operation of HS2 on tourism can be evaluated.
- 2.1.2 Tourism is widely acknowledged as pivotal to the viability and vitality of the economy of the area. The Chilterns AONB is currently the most visited AONB in Britain. Given its proximity to London and other large urban centres, it plays a vital role as the “green lung” for millions of visitors. It is estimated that 10.6 million visitors travel to the AONB for holidays and leisure day trips from outside the area each year and whilst they are there spend £149 million in local village shops, pubs, cafe’s, restaurants, attractions, and B&Bs and by doing so, create and sustain jobs for the local community¹.
- 2.1.3 The local community not only benefits from the opportunities presented by visitor expenditure for entrepreneurship and employment, but the presence of quaint shops, cafes and other facilities which are created or sustained by visitors also play a key role in making the towns and villages of the Chilterns AONB a desirable place in which to live and work.
- 2.1.4 The Chilterns AONB Leisure Visitor Survey (which included an economic impact analysis of leisure visitors for the wider Chilterns area), is now seven years old² and the study did not provide a separate set of figures for the volume and value of tourism at town level or for specific areas within the AONB. The volume and value of tourism in the HS2 corridor of the Chilterns is therefore not known. It is this absence which has given rise to this study.

2.2 HS2 Corridor in the Chilterns AONB

- 2.2.1 For the purpose of this study, the area of interest includes the key towns/villages located within the ‘HS2 corridor’. These are Wendover in the District of Aylesbury Vale, Amersham (including Old Amersham), Chesham, Great Missenden and Chalfont St Giles, all of which are located in Chiltern District. There are several villages which are within close proximity to a number of these towns, which play a key role in the visitor experience of the area and where local businesses receive a significant proportion of their income from visitors. These are the villages of Little Missenden, Chenies, the Lee, Jordans, Halton, Weston Turville, Chartridge, Latimer and Aston Clinton and have been included in this study.
- 2.2.2 Overall, the HS2 corridor for this study covers some 191 sq kms of the total 833 sq kms represented by the whole Chilterns AONB – just over one fifth of the landscape.
- 2.2.3 The area of interest is wider than those places and attractions in the immediate vicinity of the line as the disturbance impacts of construction, and of the construction traffic routes, will extend

¹ Source: 2007 Chilterns AONB Visitor Survey and Economic Impact Study, Tourism South East. The study established that by far the most frequent visitors are local residents who live in towns/villages within the AONB – an estimated 44 million visits a year. With the inclusion of local visitors, the expenditure rises to £337 million with a further £135 million through multiplier effects ie a total of £472 million for the AONB. Appendix 1 explains the key differences between the 2007 and 2014 Surveys.

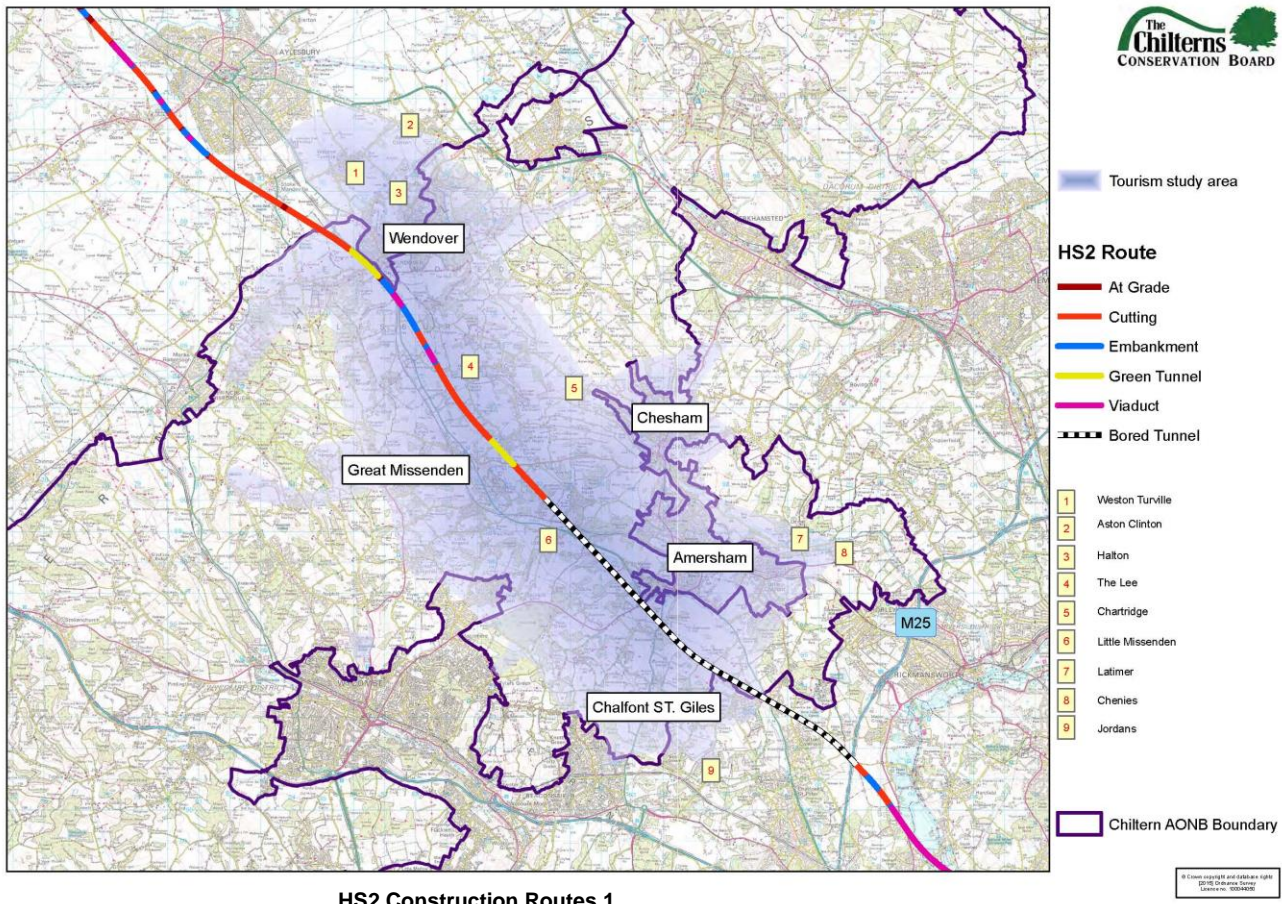
² Ibid.

widely (e.g. sections of the A413 will be heavily used for the 7-year building programme). A map of the key construction traffic routes is attached in Appendix 3.

2.2.4

The map below shows the proposed route of the HS2 line as it cuts across the Chilterns AONB. The tourism study area (shaded) is not a uniform shape as we have gone further afield than the immediate corridor in certain instances, to include major tourist attractions or areas which are known to play an important role in tourism or which are affected by HS2 construction routes.

Figure 1: HS2 corridor and route through the Chilterns showing tourism study area

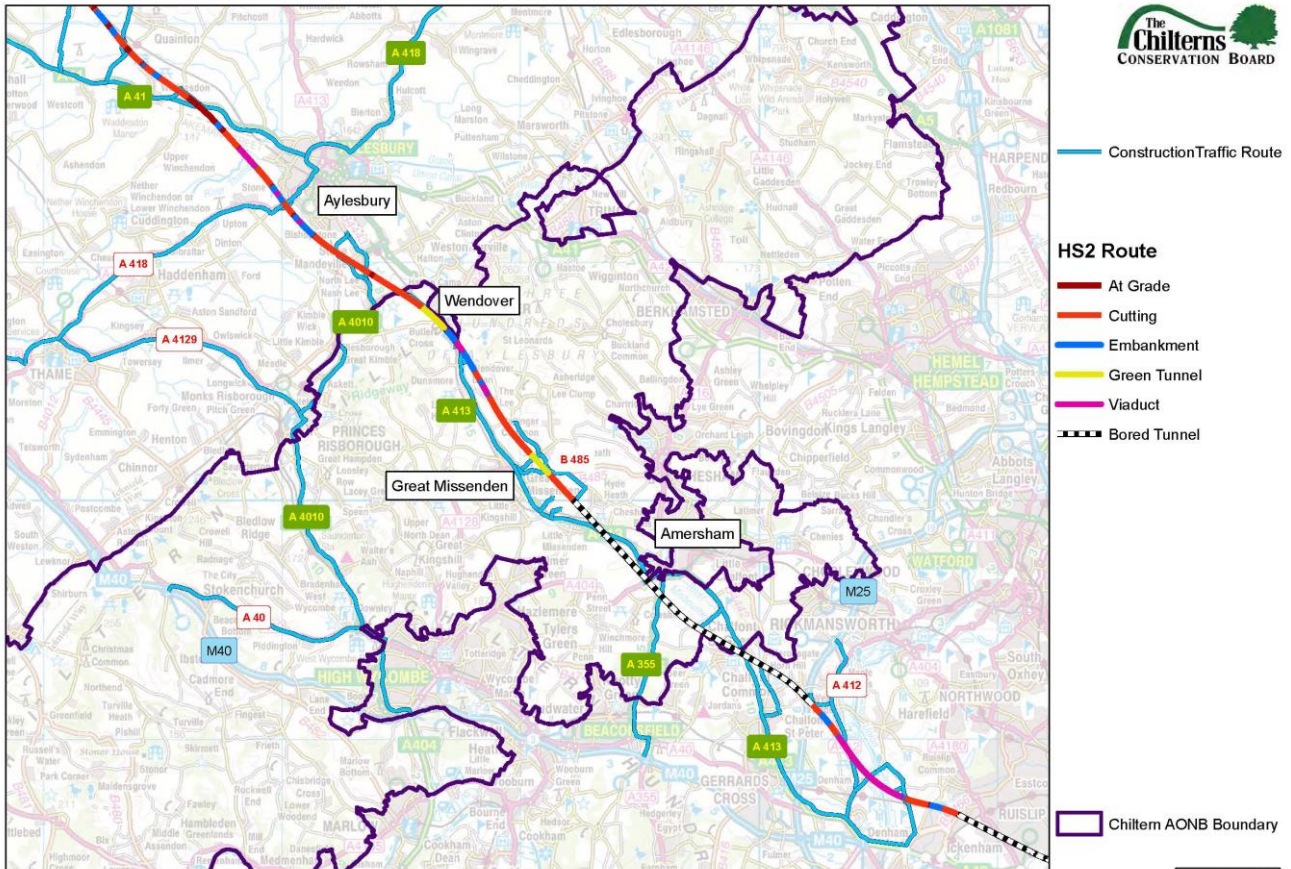


HS2 Construction Routes 1

2.2.5

All areas in the HS2 corridor will be at risk from a loss in tourism due to the construction (from 2017) and operation (from 2026) of HS2, although not all the places will be equally vulnerable or at the same time for example where HS2 is not proposed to be in a bored tunnel. For some places, particularly Great Missenden and Wendover, it is not only that HS2 will be built wholly from the surface, and involve construction works that last for many years (up to seven) using public roads that impact a wide area (as the maps show), but that when completed HS2 itself will also be visible, be audible and dissect the area.

Figure 2: HS2 corridor and route through the Chilterns showing construction traffic route



HS2 Construction Routes 1

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2.3 Study objectives

- 2.3.1 In view of the data gaps, TSE Research was commissioned by the Chilterns Conservation Board, on behalf of a number of Parish Councils and local community groups, to undertake a study to quantify the economic contribution made by visitors in the HS2 corridor to the economy of the Chilterns AONB area which will be affected during the construction phase and operation of HS2.
- 2.3.2 The study will establish for the HS2 Corridor area (as defined earlier) and for each of the main towns within it, the following outputs:
- Total number of visitors staying overnight
 - Total number of nights spent by visitors
 - Total number of day visitors
 - Total expenditure incurred by overnight visitors
 - Total expenditure incurred by day visitors
 - Total visitor expenditure including multiplier impact
 - Total jobs supported
- 2.3.3 As the focus of this study is on tourism it does not include the informal recreational visits made by local residents living within the administrative boundaries of Aylesbury Vale and Chiltern District Councils eg walking the dog. Nor does it include routine visits made by visitors from outside the area for the purpose of domestic activities such as visiting banks, solicitors or dentists or specialist shops.
- 2.3.4 The study also does not include the value of tourism/leisure visits made by local resident visitors who will overwhelmingly be the most frequent visitors – as was shown by the 2007 AONB survey (see Appendix 1), where they easily more than doubled the non resident tourist income figures. If resident tourist/leisure income had also been included in this 2014 study it too would have led to larger figures, see Appendix 1.
- 2.3.5 The study also does not make any assessment of the value of the loss in tourism in the HS2 corridor that may stem from the construction or operation of HS2, although it notes some places will be more at risk of losses than others. It does however provide the baseline for conducting such an assessment, and also can be used to validate other studies. An earlier study estimated that the tourism loss from HS2 could amount to £1.5 million per annum³. The £1.5m figure represents less than 2% of the tourism spend (and even less if resident spend were included) found by this study in the HS2 corridor, suggesting that the £1.5m annual estimate was low⁴.

³ *Economic impact of HS2 on Chiltern, July 2014, Peter Brett Associates. The £1.5m/a estimate was based on the value of tourism across the Central Chilterns area of the AONB (from the earlier 2007 Study) pro-rated by the hectares physically occupied by HS2.*

⁴ *This may be explained by the basis of that earlier study –as it excluded the effect of the visual and auditory impacts of HS2's operation on tourism, the disruption caused during construction, and reputational damage. It also did not include Wendover.*

2.4 Study methodology

- 2.4.1 Calculating the value, volume and impact of tourism can never be a precise science. Theoretically, the best approach is implementing cordon visitor surveys – but these are seldom affordable in practice. Thus, the method chosen is always governed by issues of affordability, practically, data availability or attainability, and data quality.
- 2.4.2 It is for this reason that the Cambridge Model – a computer based, industry specific model was developed to calculate estimates of volume, value and economic impact of tourism on a local destination basis, and has been widely used by Destination Management Organisations and local authorities since 1999.
- 2.4.3 The model was developed to provide an affordable method of calculating the value of tourism to local economies through using a range of readily available data on an area's tourism product to disaggregate county level tourism statistics. See Appendix 2 for an overview of the Cambridge Model and how it works.
- 2.4.4 County level tourism statistics are available from the three main national tourism surveys. These are:
- Great Britain Tourism Survey (GBTS). This survey provides information on tourism activity by UK residents.
 - International Passenger Survey (IPS). This survey provides information on overseas visitors to the United Kingdom.
 - Great Britain Day Visitor Survey (GBDVS). This survey collects information on leisure day visits.
- 2.4.5 A wide range of local information is then used as 'drivers' to distribute county totals to local level. For example, to calculate the number of overnight visitors staying in the area, an audit of local accommodation stock is carried out and if available, occupancy rates are gathered. Census data on the size of the local population and the number of households is also collected to help apportion the volume of VFR visits (visiting friends and relatives).
- 2.4.6 Ascertaining the size of the leisure day market is more complex and involves a review of the number and range of visitors attractions in the area from the formal types of attractions such as museums, historic properties, and data on the number of visitors they receive, to more informal attractions such as the built environment of the area, the nature of the physical landscape (including any special designations) and the popularity of the area for informal recreational activities. Also considered is the quality and appeal of specialist shops, pubs, eateries which encourage visitors into an area and the popularity of local events. An estimation of local visitor provision and services is therefore also necessary. This wider review of tourism-related businesses (other businesses which draw in tourists) in the area also helps to establish the key sectors where visitors spend their money and where local employment is most likely to be supported through tourism.
- 2.4.7 The main local data collection carried out for this study was as follows:
- Audit of commercial tourism businesses – accommodation and visitor attractions
 - Audit of 'tourism-related' businesses – e.g. specialist retail, pubs, restaurants⁵
 - Audit of 'tourism-related' events
 - Collection of accommodation occupancy rates

⁵ For the purpose of this study 'tourism-related' businesses are those which receive a significant proportion of their income from visitors buying their goods or services.

- Data on the number of visitors to tourist attractions within the area.
- Estimates of resident population based on Census of Population
- Local wage rates from Annual Survey of Hours and Earnings
- A telephone survey among sample of local businesses to establish trading conditions

2.4.8 To establish the number of accommodation operators, visitor attractions and other 'tourism-related' businesses in the area, the exercise began with gathering commercially sourced businesses intelligence records from Thomson Local Business Search Directory.

2.4.9 The initial record of businesses in the area was passed onto each of the respective Parish Councils and community groups in the area who were able to add businesses which were missed. Internet searches were also used to validate data and crosscheck sources.

2.4.10 Other important measures of the volume of tourism in the area included accommodation average occupancy rates, visitor admission numbers among tourist attractions and business turnover levels. These were gathered from a combination of national sources (e.g. England Occupancy Survey and Visits to Attractions Survey⁶) and through a local business survey carried out by TSE Research. The survey involved a short telephone interview survey with a sample of businesses from the audit to gather feedback on business performance over the past few years.

2.4.11 A multiplier was also applied to visitor expenditure to capture the subsequent 'secondary impacts' of visitor spending within the host economy. For example, additional spending might arise from local cafes purchasing more food items from local suppliers as a result of increased demand on their services. The multipliers used in the Cambridge Model are based on the findings of several business studies and case studies in the South East.

2.5 Outline of report

2.5.1 Following the Executive Summary and Introduction, Chapter 3 provides an overview of the key tourism assets of the HS2 corridor area. These are the key 'attractors' which motivate people to visit, either in their own right or as part of a wider 'Chilterns AONB' experience and include the landscape, the built environment, the 'formal' tourism businesses – accommodation and visitor attractions as well as the shopping environment, pubs and local eateries which draw people into the area.

2.5.2 The economic contribution made by tourism to the area is presented in Chapter 4. The findings are based on an industry recognised modelling exercise which is used to estimate the number of visitors to the area, how much they spent in the area, and the impact of that spending on local business turnover and employment.

2.5.3 In Chapter 5, the report ends with an overview of the tourism assets of each of the five towns in the HS2 corridor area of the AONB and the volume and value of tourism within each of these towns. A summary of the tourism assets for each location is also included.

⁶ Both surveys are commissioned by Visit England and quarterly and annual results are published on the insight page of the Visit England website. Local data sets not published are available to TSE Research through a special agreement set up between Visit England and the former regional tourist boards.

3 Tourism overview of Chilterns HS2 corridor

3.1 Introduction

3.1.1 Key assets that have contributed to the growth of tourism in the Central Chilterns include the following: the outstanding natural beauty of the local landscapes, the largely unspoilt character of the built environment, proximity to London and ease of access by road and rail.

3.1.2 The contribution made by visitors to the local economy helps sustain many businesses in the Central Chilterns. The presence of the shops, cafes and other facilities which are created or sustained by visitors plays a key role in making the towns and villages of the Central Chilterns such a desirable place in which to live and work.

3.1.3 Some of the key features of the tourism market include the following:

- There are 47 accommodation establishments in the HS2 corridor, offering just under 2,000 bedspaces. These range from small B&Bs to large hotels.
- There are over 30 formal visitor attractions ranging from countryside sites, traditional visitor attractions such as the Roald Dahl Museum, sporting facilities, museums, galleries and historic buildings.
- The market towns in the HS2 corridor act as gateways to the Chilterns. They are an attraction in themselves, offering a strong food and drink offer (122 pubs, restaurants and cafes which get a high proportion of their business from leisure visitors) and 84 specialist retail outlets.
- The HS2 corridor is a popular location for walking and cycling events and challenges. In addition there are over 30 public events which bring tourists into the area, especially arts & crafts, food, music and heritage events.

3.2 Outstanding natural beauty

3.2.1 The Chilterns AONB is the only nationally important environmentally protected area on the proposed route of HS2. Its landscape is highly valued for the wide variety of recreational opportunities it offers, everything from walking, cycling and horse-riding to gliding, painting, photography, ballooning, canoeing and birdwatching.

3.2.2 Many choose to visit to enjoy what is regarded as the quintessential Chilterns scenery: hills and woodlands; small and historic churches; lanes winding between fields, villages and small market towns, quaint hamlets and flint cottages, and the valleys of the River Misbourne and the River Chess – chalk streams that provide rare wildlife habits of international importance. For a majority of visitors, this enjoyment includes walking or cycling in surroundings that are both beautiful and peaceful.

3.2.3 Walkers come independently and in organised groups to enjoy miles of public footpaths and longer trails. The Chilterns has one of the finest and most extensive footpath networks anywhere in the UK and it offers four seasons walking for everyone. The trails include the ancient Ridgeway National Trail, the South Bucks Way and the 125-mile circular Chiltern Way, which takes in some of the finest scenery in the country.



Views across the Misbourne Valley

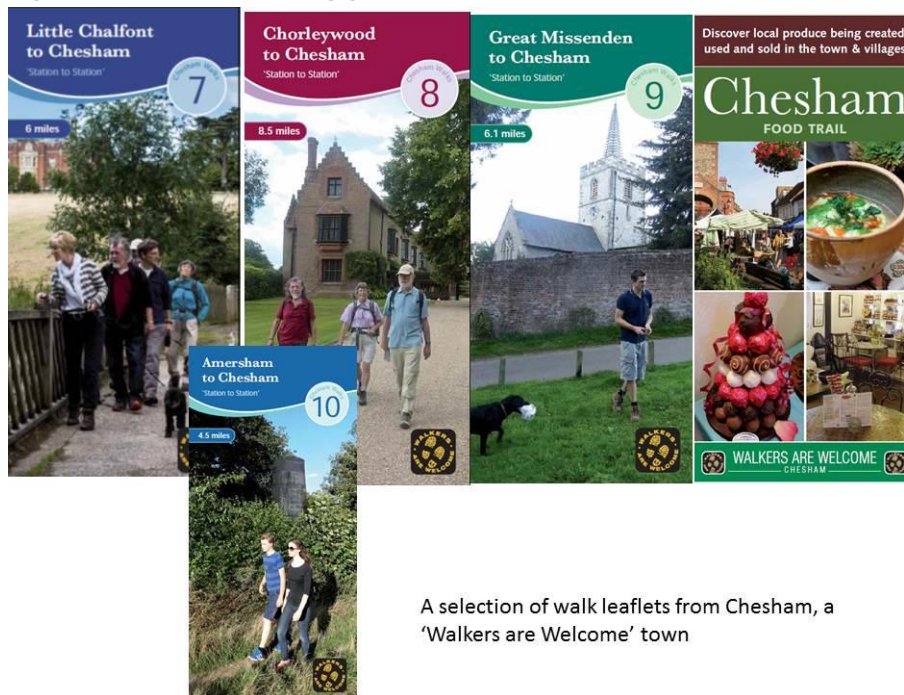


Wendover countryside

3.2.4

Details of walks that are readily available either in print or online give an indication of just how popular this area is with independent walkers. For example, visitors can easily access information on some 20 walks based on Chesham alone. This popularity extends to guided walks. The many organisations offering regular walks for groups in the Chilterns include The Ramblers, the Chiltern Society, Amersham Museum, Walkfreebreakfree and Chilterns Weekend Walkers. All have busy calendars offering a choice of walks throughout the year. Some are themed e.g. based on Midsomer Murders. Significantly, in 2010 Chesham gained its Walkers are Welcome status as a key part of its regeneration strategy. The title reflects the importance of the contribution that walkers make to the economy of these Chilterns towns.

Figure 3: Example of walking guides



A selection of walk leaflets from Chesham, a 'Walkers are Welcome' town

3.2.5

There are also specific Health Walk programmes e.g. 10 in the Misbourne Valley alone organised by Simply Walk, generating over 7000 attendances in 2012/13. These take place in and around the HS2 corridor identified for this study.

3.2.6

Cycling is an increasingly popular way of exploring the landscapes of the Chilterns both on and off the roads. The Chilterns Conservation Board is a lead partner in The Cycle Chilterns partnership, which is funded by the Department for Transport to increase cycling within the Chilterns as an alternative to the car. The project includes the promotion of two major cycle routes. The Chilterns Cycleway is a 170 mile circular cycle route which takes in the best of the Chilterns

scenery. Wendover, Amersham, Great Missenden and Chesham are recommended gateway towns to the route. The Chiltern Heritage Cycling Trail is divided into three 25 mile loops – each of which starts and returns to Amersham, taking in Chesham, Hyde Heath, Little Missenden, Great Missenden, South Heath, The Lee and Chartridge.

3.2.7 In addition to independent cyclists, some 36 cycle clubs are known to organise rides within the Chilterns area, mainly on quiet country lanes. Hills and woodlands also make the Chilterns a chosen destination for mountain biking. As a leading mountain bike venue, The Aston Hill Bike Park near Wendover attracts riders from far afield. Bucks MTB members have been riding and promoting mountain biking in this part of the AONB for many years. In 2013, with the help of Cycle Chilterns funding, five more group members were trained as ride leaders – an indication of the ever-increasing popularity of this activity.



Aston Hill mountain biking



Cycling in the Chilterns

3.2.8 Cyclists of all descriptions came together for the inaugural Chiltern Cycling Festival which took place in July 2014, centred on Amersham. The festival was supported by British Cycling, Bucks County Council, Amersham Town Council and Sustrans. On 12 September 2014 there was the Friends Life Tour of Britain that went through the HS2 corridor including roads that will be bisected by HS2 (in South Heath) that are part of the National Cycle Network, Route 57. The hills of the Chilterns make cycling a significant and popular activity.

3.2.9 A summary of the main publically promoted walking and cycling routes in the HS2 corridor that will be affected by HS2 are:

Table 1: Summary of Walking/Cycling routes in the Central Chilterns affected by proposed HS2

National routes	Regional routes	Local promoted routes
The Ridgeway National Trail The Icknield Way National Cycle Network route 57	The Chilterns Cycleway The Chiltern Link Sustrans route 30 The Aylesbury Ring The Chiltern Way Chiltern Heritage Trail (3 regional cycle routes) South Bucks Way	Chilterns Country View of the Vale Great Missenden Circular Walk Walks in the Misbourne Valley Great Missenden and Angling Spring Wood stile-free walk Extensive range of station walks from Chesham Extensive range of heritage walks from Chesham Chesham Food Trail
Total 3	Total 7	Total 25+

3.3 The character of the built environment

3.3.1 Each one of the market towns and villages included in the scope of this survey boasts an attractive central core of old and historic buildings, including many historical churches, many of which date back to the 17th century. With roads that are largely free of all but local traffic, they offer a relaxed and enjoyable visitor experience. In Old Amersham, Chesham, Great Missenden and Wendover, unspoilt views of the nearby hills and woodlands combine with the pleasing townscape to create a distinctive Chilterns 'sense of place'. This photogenic quality, together with the absence of intrusive traffic noise, has made the area a popular location for filming. Notable examples include the TV series *Midsomer Murders*: the creation of Visit Buckinghamshire's Midsomer Murders Trail has been influential in attracting both UK and overseas visitors to destinations within the Chilterns and neighbouring locations.

3.4 Ease of Access

3.4.1 Ease of access plays a crucial part in bringing visitors to the area. The Chilterns is well served by Chiltern Railways and the Underground stations of the Metropolitan Line, offering a quick route from London to the heart of the Chilterns AONB via stations at Great Missenden, Amersham, Chesham and Wendover, with fastest journey time of just 40 minutes. For visitors arriving by car, from further afield, it is quickly reached via motorways including the M25, M40 and M1. The A413 is an important road that connects the Chalfonts to Amersham, Great Missenden and Wendover

3.4.2 Such easy access has helped to establish this part of the Chilterns as a gateway to the wider AONB. Local roads, buses and rail provide convenient links between neighbours, facilitating reciprocal visits between this and other destinations and attractions both in and beyond the AONB. Typically, visitors may combine time spent in the Chilterns District with a visit to Waddesdon Manor in the Vale of Aylesbury, the Ashridge Estate near Berkhamsted, Hughenden Manor, Marlow and the Hambledon Valley in Wycombe District or attractions in and around Henley in South Oxfordshire. Major new attractions such as the Warner Brothers Studio Tours are also bringing visitors to the Chilterns District.

3.5 Visitor profiles

3.5.1 Visitors to the Chilterns fall into predictable categories. Staying visitors come for leisure trips, business trips, conferences, weddings and visits to friends and relatives.

3.5.2 Weekend walkers, and cyclists, feature prominently amongst independent day visitors on trips from outside the area. This includes large numbers of walkers on organised activities, either with walking groups, Duke of Edinburgh schemes, scout groups, charity walks or guided walks offered by countryside sites. Chenies Manor, the Roald Dahl Museum in Great Missenden, Milton's Cottage in Chalfont St Giles and the nearby Chiltern Open Air Museum are amongst the attractions which receive visits from coach-borne groups, as does Old Amersham. Events can also attract a surge of day visitors to both towns and villages. For example, 5000 people attend the Chalfont St Giles Show while the Plant Fair at Chenies Manor is amongst the most popular plant fairs in the South East region.

3.5.3 In identifying visitor profiles, account must also be taken of a more local catchment area; these are residents living just outside the Chilterns area who make regular trips to its towns and villages to enjoy its attractive selection of boutiques and shops, cafes, restaurants and pubs in pleasant surroundings that are easily reached.

3.6 Events

3.6.1 There are regular outdoor events taking place in the HS2 corridor and the wider Chilterns area, and many of these attract hundreds of participants and spectators from outside the area.

3.6.2 There are numerous other types of events in the HS2 corridor, including historic events, music, arts and food (see Table 2).

Table 2: List of events within HS2 Corridor

Event	Town/nearest Town
Old Amersham Charter Fair	Amersham
Old Amersham Heritage Days	Amersham
Chilterns Hundred Cycling Event	Amersham
Hyde Heath Village Fete	Hyde Heath, near Amersham
Chalfont St Giles and Jordans Literary Festival,	Chalfont St. Giles
Chalfont St Giles Country Show & Fun Run,	Chalfont St. Giles
Chenies Manor Plant Fair	Chenies
Christmas Evening in the High Street	Chesham
BURYFields Festival of Music and Comedy	Chesham
Tour de Pednor Bike Ride	Chesham
Farmers' markets	Chesham, Great Missenden, Wendover
Christmas Evening in the High Street	Great Missenden
Great Missenden Food Festival	Great Missenden
Hyde End Spring and Autumn Craft Fairs	Great Missenden
Lighthouse Christian Camp	Great Missenden
May Fair	Great Missenden
Chiltern Steam Rally	Great Missenden
Ley Hill Beer and Music Festival	Ley Hill / Chesham
Little Missenden Festival Music and the Arts	Little Missenden
The Lee Flower Show	The Lee
Chilterns Three Peak Challenge	Wendover/Coombe Hill area
Bucks Open Studios – June every year, lots of locations, including 5 arts trails in the Chilterns, as follows: Amersham Art Trail – 20 exhibitors in 2014, Chalfont Art Trail – 7 exhibitors in 2014, Chesham Art Trail – 11 exhibitors in 2014, Chiltern Villages Art Trail - 8 exhibitors in 2014, Hazelmere, Holmer Green & Penn	
National Garden Scheme (12 locations in HS2 corridor) – early summer every year	
Heritage Open Days (eg Halton House, Wendover) – 12 locations in HS2 corridor, Sept. every year	
Churches Cream Teas – especially Great Missenden Church and Little Missenden Church.	

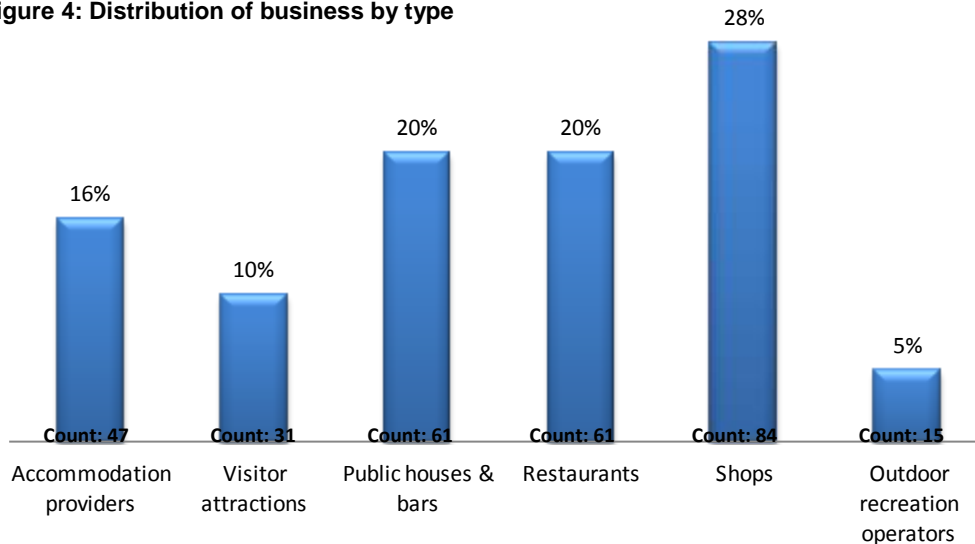
3.6.3 The larger events include the annual Chilterns Hundred Cycling Event which starts in Amersham and attracts 1,400 participants and the Chilterns Three Peaks Challenge which takes place in the Wendover/Coombe Hill area and attracts around 1,000 participants. As well as the participants, these events also bring in additional visitors in the form of friends/family/media and other spectators. In addition there are trail-running events, half-marathons, orienteering events and many others.

3.7 Tourism-related businesses

3.7.1 It is the landscape and scenery that provides the backdrop for a flourishing tourism industry. The audit carried out for this study identified a total of 299 tourism and tourism-related businesses located in the HS2 corridor area.

3.7.2 The most numerous (28%) are independent retailers including fashion boutiques, antique shops and specialist delicatessens. A fifth are restaurants & cafes and a further fifth are public houses and bars. There are 47 accommodation providers (16% of total) and 10% are visitor attractions. There are also 15 outdoor recreation based businesses accounting for 5% of the total.

Figure 4: Distribution of business by type



Commercial accommodation businesses

3.7.3 The audit listed 47 commercial accommodation businesses which in total provide an estimated 1,940 bedspaces. In terms of the number of establishments, B&Bs and inns constitute the largest accommodation sector. The Kings Arms and The Crown at Old Amersham are the largest and most prestigious hotels in the area, with a total of 140 beds. In addition there are three conference centres: Missenden Abbey, Chartridge Lodge near Chesham and Latimer House near Chenies add a further total of 605 beds available for conferences, weddings, residential courses as well as offering rooms to individual staying visitors.

3.7.4 With the exception of the conference centres, most of these establishments are relatively small, often family run businesses serving the holiday market.

3.7.5 It is also worth mentioning Hampden House near Great Missenden which specialises as a wedding venue. Whilst the stately house does not provide accommodation, it can cater for up to 250 guests and many of these guests will stay in the local area thus providing a source of additional income for hotels, B&Bs, inns and cottages in the surrounding area.

3.7.6 Whilst there are accommodation businesses located in all the towns in the HS2 corridor, most cluster in and around the Amersham area, followed by Great Missenden (see Table 2 and Figure 4 overleaf).

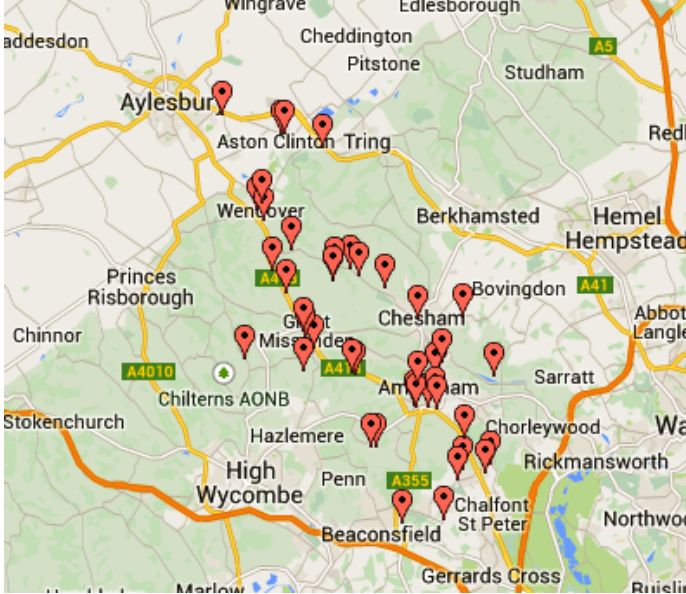
Table 3: Number of accommodation businesses in HS2 corridor

	Number	Proportion
Amersham ⁽¹⁾	15	32%
Chalfont St Giles	7	15%
Chesham ⁽²⁾	5	11%
Great Missenden	12	25%
Wendover	8	17%
Grand Total	47	100%

⁽¹⁾ Includes Latimer Place Conference Centre and Bedford Arms Hotel in the total figure given proximity to Amersham

⁽²⁾ Includes Chartridge Lodge Conference in the total figure given proximity to Chesham

Figure 5: Map of accommodation businesses



**Total bedspace
capacity is
almost 2,000**

Visitor attraction businesses

3.7.7 For the purpose of this study, visitor attractions selected for inclusion in the audit are those which match the definition used by Visit England which is as follows:

“..an attraction where it is feasible to charge admission for the sole purpose of sightseeing. The attraction must be a permanently established excursion destination, a primary purpose of which is to allow access for entertainment, interest, or education and can include places of worship (but excludes small parish churches); rather than being primarily a retail outlet or a venue for sporting, theatrical, or film performances. It must be open to the public, without prior booking, for published periods each year, and should be capable of attracting day visitors or tourists as well as local residents. In addition, the attraction must be a single business, under a single management, so that it is capable of answering the economic questions on revenue, employment etc.” Visit England.

3.7.8 Based on this definition there are 31 visitor attractions in the area under the scope of this study.

Table 4: Number of visitor attractions in HS2 corridor

	Number	Proportion
Amersham ⁽¹⁾	4	13%
Chalfont St. Giles	6	19%
Chesham ⁽¹⁾	3	10%
Great Missenden	10	32%
Wendover	8	26%
Grand Total	31	100%

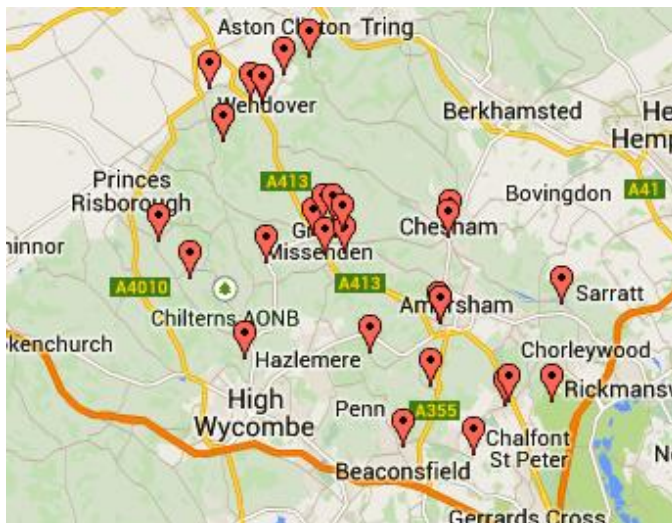
⁽¹⁾ Total for Amersham includes Chenies Manor House.

Table 5: Type of visitor attractions in HS2 corridor

	Number	Proportion
Museums	6	19%
Art Galleries & Fine Art Dealers	5	16%
Historical building	5	16%
Other	4	13%
Forest/Woodland/Country Park (National Trail) ¹	5	16%
Brewery Tours	2	6%
TIC	2	6%
Cinema	1	3%
Theatre	1	3%
Grand Total	31	100%

¹ This includes Coombe Hill, the National Trust site and The Ridgeway which passes through Wendover

Figure 6: Map of visitor attractions



A third of visitor attractions are based in Great Missenden

3.7.9

Although the small parish churches in the HS2 corridor do not meet the definition from “Visit England” and are excluded from the 31, some are of historical interest (in Great Missenden, Little Missenden, The Lee, Little Hampden, Wendover, Chesham, Chalfont St Giles, and Old Amersham) and do receive visitors. They will be responsible for bringing custom into the local area e.g. to pubs and cafes in the villages, and some are also cafes in their own right e.g. both Missenden churches are popular for cream teas on Sundays (over 5000 teas are served at Great Missenden).

3.7.10 A third are museums including the Roald Dahl Museum, one of the most visited tourist attraction in the HS2 Corridor.

3.7.11 The Roald Dahl Museum has received more than 500,000 visitors since it opened in 2005, it achieved its admission target of 68,000 visitors in 2013 and is set to exceed this in 2014. Visitor numbers gathered for this study show that the museum is growing in popularity. Compared to 2009, there has been a 23% increase in the volume of visits (see Table 5 below). The main visitor market is the family one and the majority of visitors come from a 90 minute drive time catchment. It is also popular with schools and attracts regular school groups from a wide catchment.

Table 6: Volume of visits to Roald Dahl Museum

	Visitor number	Annual % increase
2009	54,675	
2010	55,387	1%
2011	57,680	4%
2012	64,384	12%
2013	67,478	5%

Source: Visit England Visits to Attractions Annual Survey

3.7.12 The other museums situated along the HS2 Corridor or within close proximity include the Chiltern Open Air Museum (39,000 visitors) Amersham Museum (8,900 visitors), Miltons Cottage Museum in Chalfont St. Giles (1,600 visitors), Chesham Museum, a very small museum which receives a few hundred visitors a year, and the Trenchard Museum in Wendover.

3.7.13 Visitors' experience of being part of the history of the area is also gained by visiting Chenies Manor House, a historic and enchanting Tudor Manor House with its award winning gardens is set in the charming estate village of Chenies, very close to Amersham. For visitors interested into delving deeper in the past, there is Missenden Abbey in Great Missenden. Situated within the grounds of a former Augustinian monastery, founded in 1133 the original Abbey was demolished in the 14th century and in its place a country house was constructed and also known as "Missenden Abbey" in 1574, on the site of the former cloisters, and incorporating some of the monastic remains. In addition to being a tourist attraction, the site offers conference facilities including 57 rooms and is a venue for weddings and various social and corporate events.

3.7.14 Hughenden Manor, the Victorian home of Benjamin Disraeli is a National Trust property that attracts many visitors (over 100,000 a year) to its house and grounds. Regular themed weekends are now popular. In September 2014 the 1940's weekend attracted the largest number visitors it had ever had in a day (over 1700).

3.7.15 More contemporary experiences are offered by two breweries in the area, the Malt the Brewery in Great Missenden and the Chiltern Brewery in Wendover which offer visitors the opportunity to sample and buy traditional ales and ciders and take part in brewery tours.

3.7.16 There is one prime attraction in the area representing the performance arts sector- The Elgiva. This is a 300 seated / 400 standing capacity theatre, with a digital cinema and is owned and managed by Chesham Town Council. The Elgiva presents a wide-ranging programme of professional and amateur productions, comedy, musicals, ballet/dance, one night shows, and an annual Christmas pantomime. It also shows an eclectic range of movies and hosts exhibitions, weddings and other public and private events. Visitors interested in the visual arts are catered for by five small galleries in the area; two in Great Missenden (Carina Haslam Art and One Church Street Gallery) and two in Wendover (Aces High Aviation Gallery and The Military Gallery), and one in Old Amersham (Hawker Gallery). Aces High has been confirmed as 'the world's foremost specialists in Aviation and Military Art' and holds regular events involving WW2 pilots.

- 3.7.17 A higher number of visitor attractions are found in Wendover (6 of the 19) and includes the largest attraction in the area, Wendover Woods, which is visited by approximately 350,000 visitors each year⁷. Only one of the attractions is based in Amersham (Amersham Museum), which also organises martyrs guided walks in costume.
- 3.7.18 Two particularly unique attractions that border the corridor are the Bekonscot model village , with over 170,000 visitors a year, and the Horse Trust (a home for retired and often famous horses, at Speen). In both cases access is by road and may be impacted by the disruption of the construction works.
- 3.7.19 There are a number of other sites which are worth mentioning which form part of a wider visitor experience but which extend past the area under study. One is the 87 mile long Ridgeway National Trail. The Ridgeway travels through the more-wooded hills and valleys of the Chilterns AONB where, as well as archaeological treasures, there are several nature reserves rich in the wildlife found in chalk grassland habitats. The Ridgeway goes close to or through several villages and small towns including Wendover.
- 3.7.20 Another is the Grand Union Canal, Britain's longest canal. The canal passes through the Chilterns at Tring in Wendover where visitors will also find 11 miles of waymarked walking trails taking in woods, fields, locks and towpaths. There is also the Coombe Hill National Trust site near Wendover, which offers visitors a gentle 1 mile walk along chalk grassland and past The Monument which was built in 1904 in memory of the 148 men of Buckinghamshire who gave their lives in the South Africa War 1899 – 1902. Also close by and managed by the National Trust is the Ashridge Estate, which offers wildlife-rich landscapes which can be explored on foot or by bike and is visited by approximately 700,000 visitors a year.

Outdoor recreation businesses

- 3.7.21 As well as the traditional tourism businesses of accommodation providers and visitor attractions, there are several other businesses which rely on the open countryside and attractive scenic views of the landscape to attract customers. These are businesses involved in outdoor recreational activities.
- 3.7.22 Within the HS2 corridor area there are 12 businesses of this type which are popular with tourists. These include four riding schools, four golf clubs, and a nationally renowned tennis club which is home to a number of national tournaments and training camps. The area is also the base for a hot air ballooning company that operates from the grounds of the Black Horse Pub in Great Missenden.
- 3.7.23 Situated in Wendover Woods is Go Ape Tree Top Adventure, the tree-top assault course of high wires, high ropes crossings and zip wires which was visited by 11,416 visitors in 2013⁸ and Aston Hill Bike Park which hosts cycling events and activities. Wendover is also home to a family run walking and cycling holiday company The Carter Company. In addition to arranging holidays and short breaks in a number of UK and overseas destinations, the company specialises in tailor made cycling and walking holidays in the Chilterns AONB.

⁷ Visitor admission figures for Wendover Woods come from Visit England's Visits to Attractions Annual Survey.

⁸ Visitor admission figures for Go Ape come from Visit England's Visits to Attractions Annual Survey

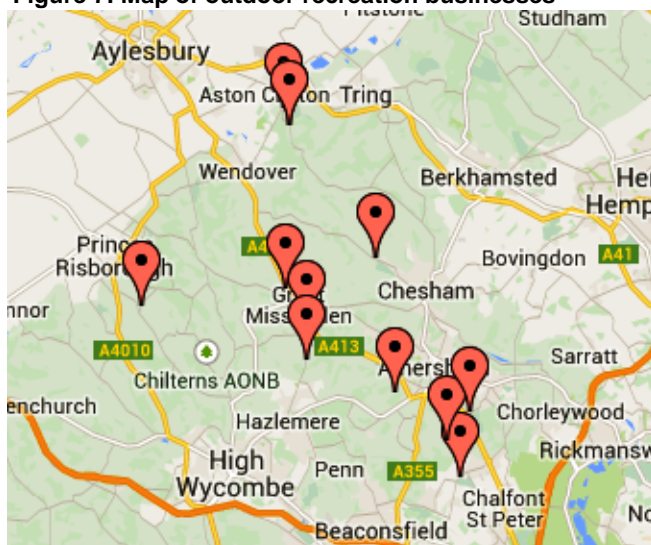
Table 7: Number of outdoor recreation businesses in HS2 corridor

	Number	Proportion
Amersham	2	17%
Chalfont St. Giles	2	17%
Chesham	1	8%
Great Missenden	4	33%
Wendover	3	25%
Grand Total	12	100%

Table 8: Type of outdoor recreation businesses in HS2 corridor

	Number	Proportion
Golf Courses & Clubs	4	33%
Hot air balloon rides	1	8%
Other sporting activities	2	17%
Riding Schools	4	33%
Tennis Club	1	8%
Grand Total	12	100%

Figure 7: Map of outdoor recreation businesses



The most common are Golf Clubs and Riding Schools

Food & drink businesses

- 3.7.24 The audit identified 63 public houses and bars within the study area. They are greater in number in Amersham, Great Missenden and Chesham.
- 3.7.25 A number of these public houses also offer B&B accommodation and are included in the list of accommodation. These include The Chequers Inn in Old Amersham and The Ivy House in Chalfont St. Giles.
- 3.7.26 Whilst most of the public houses also serve food there are several which offer a traditional restaurant service and thus are also separately counted as Restaurants. These include the

Merlin's Cave pub and restaurant in Chalfont St. Giles, the Milton's Head pub & restaurant also in Chalfont St. Giles, and the Nags Head Inn & Restaurant in Great Missenden.

Table 9: Number of pubs in HS2 corridor

Town	Number	Proportion
Amersham	16	25%
Chalfont St. Giles	5	8%
Chesham	15	24%
Great Missenden	16	25%
Wendover ⁽¹⁾	11	18%
Grand Total	63	100%

⁽¹⁾Wendover total includes three pubs located in Weston Turville



The largest number of pubs are found in Amersham and Chesham

3.7.27

There are 61 restaurants and cafés along the HS2 Corridor, and the largest number are located in Amersham, particularly in Old Amersham. There are only two restaurants/cafes in Chalfont St. Giles, among them are the two pub restaurants which have already been identified (i.e. Merlin's and Milton's Head).

Table 10: Number of restaurants and cafés in HS2 corridor

Town	Number	Proportion
Amersham	24	39%
Chalfont St. Giles	2	3%
Chesham	11	18%
Great Missenden	13	21%
Wendover	11	18%
Grand Total	61	100%

Figure 9: Map of restaurants and cafés



The largest number of restaurants & cafes are found in Amersham

Retail businesses

3.7.28 The retail businesses included in the audit were carefully selected to present those types of product offers which appeal most to tourists. These include local artisan food produce, arts and crafts, designer/boutique products, and shops providing supplies/equipment for outdoor pursuits including bike repair shops. The listings do not include petrol stations, supermarkets, convenience stores and newsagents which are mainly used by locals, even though visitors do use them too.

3.7.29 This search identified 84 businesses representing 22 different business types, ranging from arts, crafts & gift shops, chocolaterie’s, farm shops, fashion boutiques, to specialist outdoor recreational clothes/equipment retailers.

Table 11: Number of tourism-related retail businesses in HS2 corridor

Town	Number	Proportion
Amersham	32	38%
Chalfont St. Giles	1	1%
Chesham	15	18%
Great Missenden	18	21%
Wendover	18	21%
Grand Total	84	100%

Table 12: Type of tourism-related retail businesses in HS2 corridor

	Number	Proportion
Fashion boutique	25	30%
Arts, crafts & gifts specialist	8	10%
Specialist outdoor recreational clothes/equipment retailer	8	10%
Gallery (retail)	5	6%
Soft furnishing specialist	5	6%
Collectables and antiques	4	5%
Farm produce	4	5%
Garden Centre	4	5%
Jewellers	4	5%
Chocolaterie	3	4%
Delicatessen and cafe	2	2%
Interior design	2	2%
Bookbinding and restoration	1	1%
Boutique bags and leather goods	1	1%
Boutique shoe shop	1	1%
Brewery shop	1	1%
Comic bookshop and cards	1	1%
furniture/antiques	1	1%
Specialist Sugarcraft supplies and equipment	1	1%
Specialist bookshop	1	1%
Specialists in dancewear and dance products	1	1%
Toy retailer	1	1%
Grand Total	84	100%

Figure 10: Map of retail businesses



A third are independent fashion boutiques

3.7.30

Sellers of artisan produce include Auberge du Chocolat in Chesham which makes and sells hand crafted chocolates. The shop also serves as a workshop, the venue for chocolate making parties and corporate events. No.2 Pound Street in Wendover provides a delicatessen and winery sourcing much of their produce locally. There are also three farm shops including Chiltern Ridge Apple Juice in Chartridge near Chesham, which is a small family run business where customers can drop off their garden apples, to be turned into cider and sold to the customer for a small fee.

The cider is also bottled and sold to a wider customer base through their online shop. The business also offers B&B accommodation.

- 3.7.31 For visitors interested in antique hunting and collectables, there are four retail outlets in the area: Antiques at Wendover, Sally Turner Antiques also in Wendover, Jack and Atticus in Amersham, and Collectors' Paradise in Chesham. In addition there are the Amersham Auction rooms that hold regular weekly general sales and a monthly antique sale.
- 3.7.32 There are eight independent art, craft and gift shops such as Liberty Rose Vintage where an assortment of hand-made soft furnishing and vintage items can be found.
- 3.7.33 Garden centres are popular and have expanded to become a centre for other businesses too, increasing their attraction to visitors from outside the area eg at Wendover; Hildriths, at Prestwood (in the parish of Great Missenden); Peterlee almost next door that has acres of Pick Your Own, and at Chalfont St Giles
- 3.7.34 The largest number of these retail businesses are found in Amersham/Old Amersham (32, 38%), followed by Wendover and Great Missenden (18, 21% each respectively). Just under a fifth (18%) are based in Chesham. Only one retail business under the selection criteria of the audit was identified in Chalfont St Giles, and that is Rowan Garden Centre.

4 Volume and value of tourism

4.1 Introduction

4.1.1 The contribution made by visitors to the local economy has been, and remains, a factor in establishing and sustaining many businesses in the HS2 corridor area. Through businesses such as the independent retailers, cafés, and inns along with the traditional tourism sectors of accommodation and visitor attractions, the impact of visitor spending on primary and secondary job creation - and on sustaining jobs – can be readily understood.

4.1.2 In this section of the report, the total volume and value outputs emanating from the modelling exercise of each of the five towns which collectively make up the study area is combined to produce an overview of the economic impact of tourism in the HS2 corridor.

4.2 Overnight tourism market

4.2.1 Based on the results of the modelling exercise, it is estimated that a total of 129,700 (rounded) visitors stayed overnight in the study area in 2013. Half of these visitors stayed in the commercial accommodation sector and most of these will be serviced accommodation – hotels, B&Bs, Inns with rooms and guest houses and the other half stayed with friends or relatives living in the area.

Table 13: Number of visitors staying overnight in HS2 corridor

Accommodation used	Total	Proportion
Commercial accommodation	64,693	50%
Home of friend/relative	65,048	50%
Total	129,741	

4.2.2 Overnight trips involved an average trip length of 3.3 nights suggesting a strong short break market and resulted in a total of 430,200 nights spent in the area.

Table 14: Number of nights spent in HS2 corridor

Accommodation used	Total nights	Avg. trip length
Commercial accommodation	136,524	2.1
Home of friend/relative	293,674	4.5
Total	430,198	3.3

4.2.3 On average overnight visitors spent £61.97 per person per 24 hours. However, this ranged from an average of £128.89 among visitors staying in commercial accommodation to £30.86 among visitors staying with friends or relatives. Overall overnight visits to the area generated a total of just over £26.6 million in visitor expenditure.

Table 15: Expenditure incurred by visitors staying in HS2 corridor

Accommodation used	Total	Proportion
Commercial accommodation	£17,597,000	66%
Home of friend/relative	£9,062,000	34%
Total	£26,659,000	

Table 16: Expenditure per night and per trip per person

Accommodation used	Per night	Per trip
Commercial accommodation	£128.89	£273.47
Home of friend/relative	£30.86	£139.31
Total	£61.97	£205.48

4.3 Day tourism market

4.3.1 Overnight visitors, however, make up only 6% of total visitor volume. By far the greatest number of visitors to the area (94%) are day visitors. It is estimated that approximately 2.2 million day trips were made to the area in 2013 generating an additional £44.6 million in visitor trip expenditure (based on average day spend of £20.05 per person).

Table 17: Volume of day visitors in HS2 corridor and related expenditure

	Number	Spend	Proportion
Total day visitors from home	1,781,600	£35,720,000	80%
Total day visitors from holiday base	445,400	£8,930,000	20%
Total day visitors to area	2,227,000	£44,650,000	100%

4.4 Total tourism volume and value

4.4.1 This brings the total volume of visitors to the area in 2013 to 2,356,700 (rounded). This figure excludes any tourists who already live in the area (local resident visitors).

Table 18: Total number of visitors in HS2 corridor

	Number	Proportion
Commercial accommodation	64,347	3%
Staying with friends and relatives	65,048	3%
<i>Sub-total for all overnight</i>	<i>129,741</i>	<i>6%</i>
Visiting for the day	2,227,000	94%
Total visitors	2,356,741	100%

4.4.2 Total expenditure by visitors (overnight and day) is estimated to be in the region of £71.3 million. Despite only representing 6% of total visitor volume, overnight visitors generated 37% of total visitor expenditure, highlighting very clearly the economic importance of this market.

4.4.3 Direct expenditure is translated to £79,761,000 worth of income for local businesses through additional indirect and induced effects (the multiplier impact).

Table 19: Total visitor expenditure in HS2 corridor

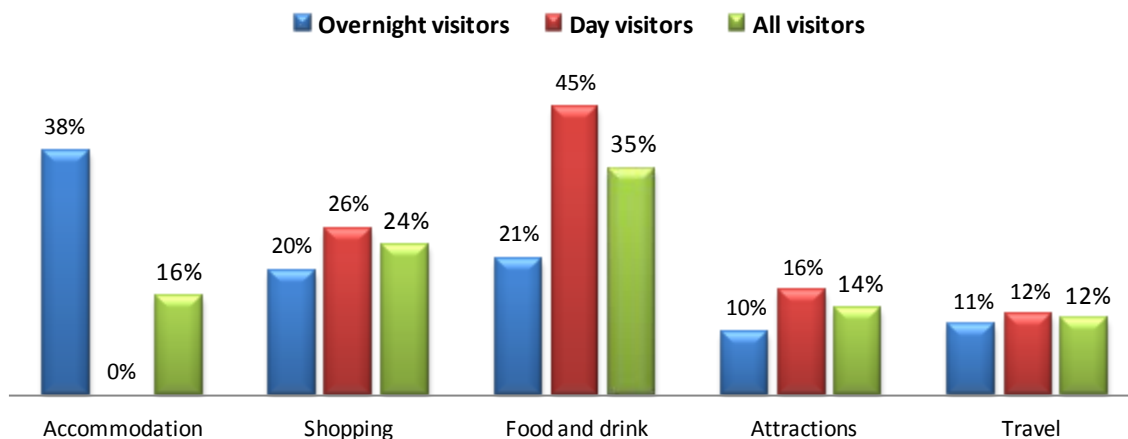
	Expenditure	Proportion
Commercial accommodation	£17,343,000	24%
Staying with friends and relatives	£9,062,000	13%
<i>Sub-total for all overnight</i>	<i>£26,659,000</i>	<i>37%</i>
Visiting for the day	£44,650,000	63%
Total visitor expenditure	£71,309,000	100%
Total visitor expenditure with multipliers	£79,761,000	

4.4.4 Unsurprisingly, the greatest proportion of overnight visitor expenditure goes towards the cost of accommodation (38%). A fifth of overnight visitor spend is spent on purchasing retail items such as gifts and souvenirs and another fifth is spent on food and drink. Only a tenth of overnight visitor spend goes towards visiting attractions in the area (i.e. attraction entrance fees) and the remaining 11% involves expenditure on travel such as purchasing petrol, parking fees, and bus /train fares.

4.4.5 Day visitors spend a significantly greater proportion of overall expenditure on food and drink (45%). Day visitors also spend proportionately more on shopping (26%) and visitor attractions (16%) than overnight visitors.

4.4.6 Overall the average expenditure per visitor to the HS2 corridor area was about £34/visitor.

Figure 11: Distribution of visitor spend by sector across HS2 corridor



4.4.7 The expenditure by visitors will help to directly support jobs in the accommodation, attraction retail, catering and transport businesses in the area. Visitor expenditure will also indirectly support a range of supporting businesses including accountants, wholesalers and builders. These businesses will also serve residents and will help to maintain the attractiveness of the area as a place to live and work

4.4.8 This tourism-related expenditure is estimated to support 2,073 FTE jobs in the area. Many of these jobs are part-time or seasonal in nature and translate into an estimated 2,768 actual jobs.

4.4.9 According to the labour market statistics drawn from the Office of National Statistics, there are approximately 24,734 employee jobs across the area (excl. self-employed). Based on our estimates, total tourism related expenditure supports 11% of these jobs.

Table 20: Total FTE & Actual jobs supported by Tourism in HS2 corridor

	FTE	Actual
Direct	1,262	1,844
Indirect	230	263
Induced	582	663
Total jobs 2013	2,073	2,768

4.4.10 As discussed in section 2.3 on Study Objectives, the local resident visitor/leisure income was not covered by this study. On the basis of the previous 2007 study for the AONB, there is a potential £14.2 million to add (making a total of over £105m including multiplier effects) which comes from the estimated 2.2 million visits made each year by local residents living within and close to the HS2 Corridor.

4.4.11 In the next Chapter we present the headline tourism volume and value figures for each town included in this study. The estimates include not only the immediate town, but also include outlying villages and hamlets.

5 Towns and villages of the Central Chilterns

5.1 Amersham



Amersham Heritage Day, 2007

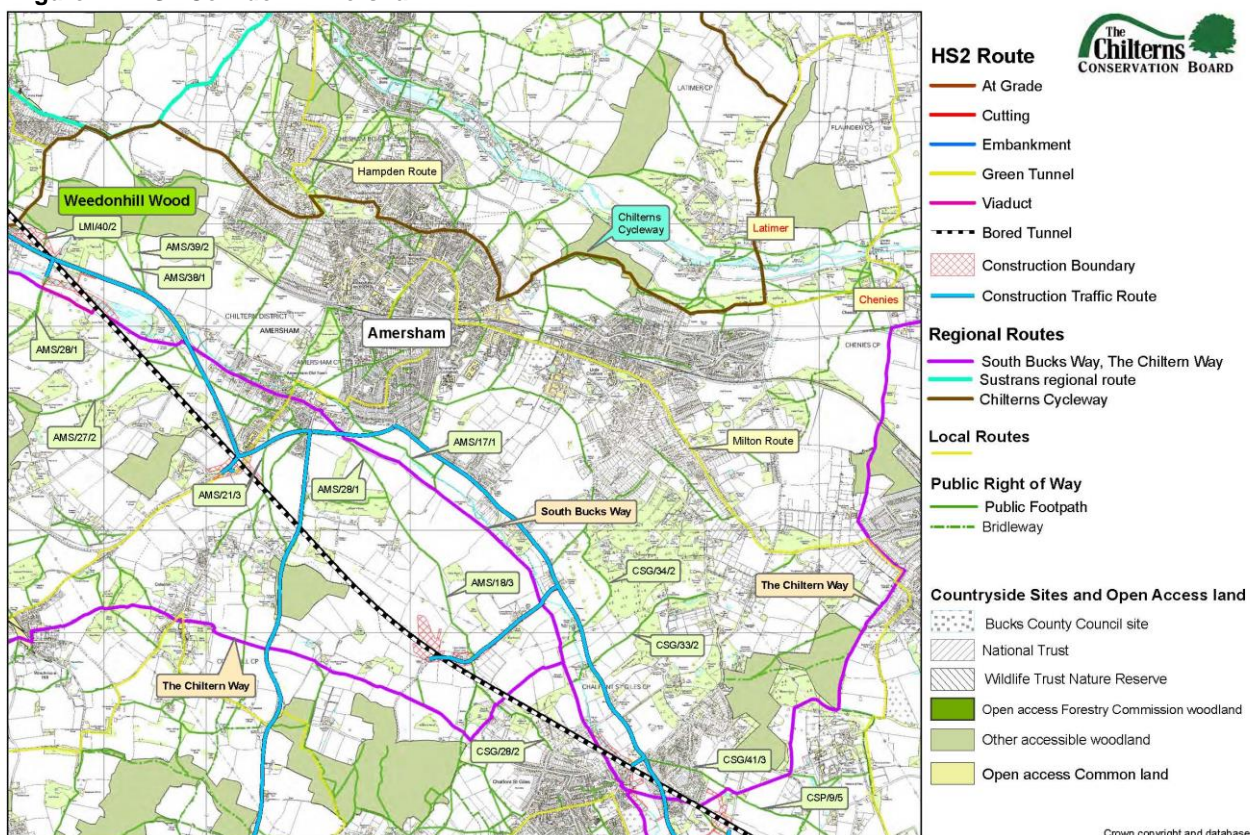


View of Old Amersham



Amersham town

Figure 12: HS2 Corridor - Amersham



HS2 - Tourism Study, Countryside Sites and Access - AMERSHAM

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The town commonly referred to simply as 'Amersham' comprises two distinctive parts: the small market town of Old Amersham and Amersham-on-the-Hill.

Old Amersham sits in the valley of the River Misbourne at the foot of a steep and wooded slope of the Chiltern Hills. Amersham-on-the-Hill developed above the Old Town with the arrival of the Metropolitan Railway in 1892. Still linked to London by the Metropolitan Line and a journey of just 39 minutes on Chiltern Railways, the station continues to provide a major entry point for visitors enjoying the attractions of Amersham itself and its surrounding countryside.

On the whole, Amersham-on-the-Hill provides the everyday shops and high street facilities which serve local residents. However, these include coffee shops, cafes and some gift shops which also meet the convenience of visitors travelling by train.

The historic Old Town, with its abundance of listed buildings, is the picturesque magnet for visitors to the town. Its main focal points are provided by the 17th century Market Hall and the ancient St Mary's Church with the adjacent Memorial Gardens. The gardens are skirted by the River Misbourne, which runs behind the north side of the ancient High Street.

Shardeloes a large Grade 1 listed mansion with its lake and gardens overlooks the town. It was the ancestral home of William Drake, MP for Amersham in 1760's. Although now split into apartments its history and its inhabitants have been influential on the development of the area. Tim Rice, the lyricist was even born there, when it was a maternity home in the war.

The High Street, Broadway, Wielden Street and the Market Square have a wealth of 17th and 18th century half-timbered buildings with fine frontages – one of which houses the Amersham Museum. Hostelryes here include the 17th century Kings Arms Hotel, The Crown Hotel, The Saracen's Head inn, The Eagle and The Swan. Together the Kings Arms and The Crown offer 140 beds. Considerable investment has recently gone into both hotels to bring them up to impressive, award winning standards. Visitors come to see the Kings Arms that featured in the well known film, 'Four Weddings and a Funeral'. It is popular for TV series too e.g. Miss Marple and Midsomer Murders

Within these streets, Old Amersham presents an impressive string of small and independent shops, deli-cafes and restaurants which attract both individuals and coach-borne groups. In addition to cafes and restaurants, there are at least 25 such retailers who are known to benefit from visitor expenditure. These range from independent boutiques and gift shops to the chic outlets of well-known names such as Whistles, Jaegar and Joules.

There are walks and rides galore from Amersham. It is a Cycle Chilterns gateway town, the Chilterns Cycleway passes through and it is the start of the Chiltern Heritage Trails. There are promoted walks along the River Misbourne and into the hills.

Events staged in this attractive setting generate further visits. Such events include art exhibitions held in the Market Hall and Heritage Day, when Amersham Old Town is en fete. Old Amersham also hosts an annual 2-day charter fair every September, the origins of which can be traced back to 1200 when King John granted a charter for an annual fair and weekly Friday market. The fair has naturally changed much over the centuries and the Shardeloes Estate now works with the Showmen's Guild to put on the annual event.

Chenies

Chenies lies 5kms to east of Amersham station. In the centre of the village, a gravel drive leads past the church to Chenies Manor House, a favoured resting place on the royal progress of both Henry VIII and Elizabeth I. The house and its award-winning gardens are open to the public and are available for weddings. Both the house and its gardens are in frequent demand for high-profile TV productions and the gardens host a series of annual events, including a major plant fair. The village has one pub – The Red Lion – and the Bedford Arms Hotel, which takes its name from the Dukes of Bedford whose family once owned the estate.

Tourism key facts (including Chenies):

- **35,000 overnight visitors**
- **475,000 day visitors**
- **£19.1 million direct visitor expenditure**
- **£21 million total expenditure benefiting local businesses**
- **626 local jobs supported**

Table 21: Total number of visitors in Amersham

	Number	Proportion
Staying commercial accommodation	25,849	5%
Staying with friends and relatives	9,056	2%
<i>Sub-total for all overnight</i>	34,905	7%
Visiting for the day	475,000	93%
Total visitors	509,905	100%

Table 22: Total visitor expenditure in Amersham

	Expenditure	Proportion
Staying in commercial accommodation	£6,950,000	36%
Staying with friends and relatives	£1,266,000	7%
<i>Sub-total for all overnight</i>	£8,216,000	43%
Visiting for the day	£10,913,000	57%
Total direct visitor expenditure	£19,129,000	100%
Total expenditure with multiplier impact	£21,070,000	

Table 23: Average trip length and spend in Amersham

Average trip length for overnight visitors	2.6 nights
Average daily spend for overnight visitors	£89.41
Average daily spend for day visitors	£22.97

Figure 13: Distribution of visitor expenditure by sector & type of visitor

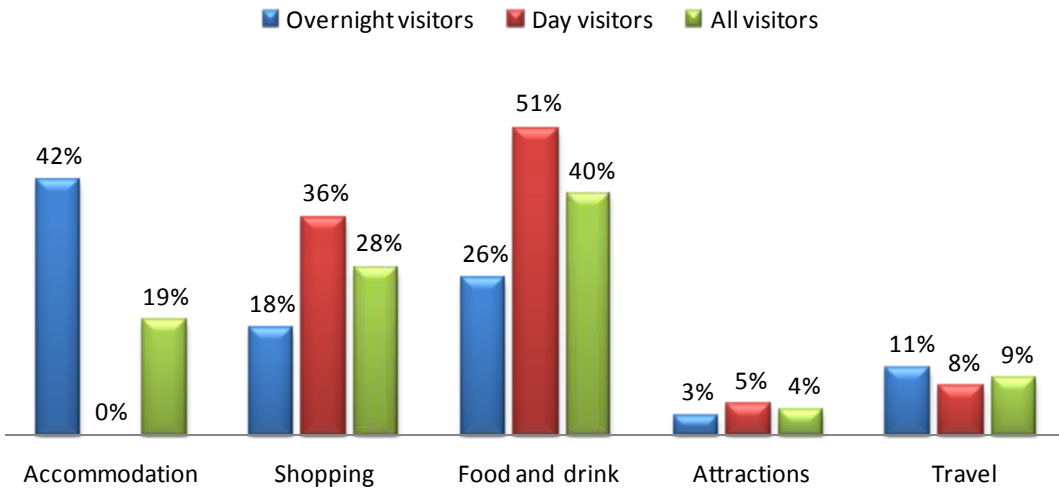


Table 24: Total FTE & Actual jobs supported by Tourism in Amersham

	FTE	Actual
Direct	299	430
Indirect	64	73
Induced	108	123
Total jobs 2013	471	626

Summary of tourism in Amersham

<p>Accommodation Establishments</p> <p>There are 13 visitor accommodation establishments offering 220 bedspaces in Amersham itself, most notably the Kings Arms and the Crown Inn. There are a further two just outside Amersham, in Chenies, and at Latimer Place Hotel & Conference Centre 2 miles from Amersham which adds a further 18 and 380 bedspaces respectively.</p>
<p>Visitor Attractions</p> <ul style="list-style-type: none"> • Amersham Museum (8,900 visitors pa) and Martyr's Walks (themed guided walks) • Chenies Manor, historic house and gardens • The Hawker Gallery • There is a large equestrian centre which bring visitors in, Shardeloes Farm Equestrian Centre. • Penn Wood, near Amersham (Woodland Trust site with signed walking trails, Access for All trail and regular ranger-led events). • Historic church in Old Amersham
<p>Restaurants/cafes</p> <p>There are 24 restaurants/cafes (15 of them in Old Amersham) which are known to be popular with leisure visitors and where visitor spend makes a substantial contribution. Many of the ones in Old Amersham are gourmet eateries with a strong regional reputation, attracting visitors from far afield. The quality of the Food & Drink product along with the retail offer are a key strength of tourism in Old Amersham.</p>
<p>Pubs/Inns</p> <p>There are 16 pubs and inns (7 of them in Old Amersham).</p>
<p>Retail</p> <p>Old Amersham has a thriving High Street, with lots of independent shops. There are 25 shops in Old Amersham which rely on leisure visitors, mainly fashion boutiques and gift shops, and a further 7 in new Amersham.</p>
<p>Events</p> <ul style="list-style-type: none"> • Old Amersham Charter Fair • Old Amersham Heritage Days • Chenies Manor Plant Fair • Amersham is a Cycle Chilterns Gateway town and benefits from many large cycling events and Sportives, such as the annual Chiltern Hundred cycling event which attracts 1,400 participants. • Bucks Open Studio, Heritage Open Days and National Garden Scheme (2 gardens). There is an Amersham Art Trail as part of the Bucks Open Studio. • Hyde Heath Village fete • There are regular theatre and performance events at Hyde Heath at the Olde Tyme Music Hall and Hyde Heath Theatre Company.
<p>Promoted walking and cycling routes passing through Amersham</p> <p>Amersham is an important gateway to the Chilterns countryside, with a wide range of promoted routes. It is a Cycle Chilterns gateway town and has attracted some high profile cycling and walking events.</p> <ul style="list-style-type: none"> • Chiltern Heritage Trail – a series of six signposted and promoted cycling and walking trails which all start in new Amersham. • Walks in the Misbourne Valley (popular with Londoners arriving by train). • South Bucks Way – a regional long-distance route • Chilterns Cycleway

5.2 Chalfont St Giles



Aerial photo of the village centre
Country Show

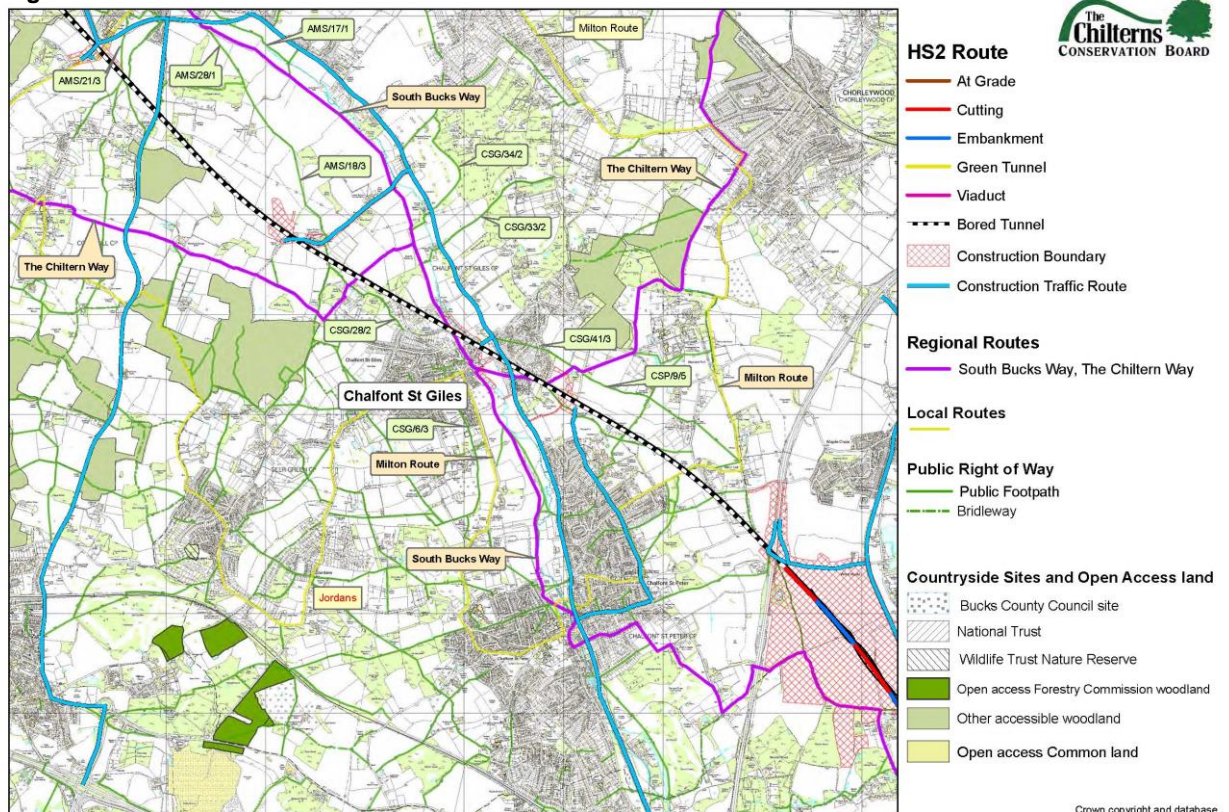


John Milton's Cottage



Chalfont St Giles

Figure 14: HS2 Corridor - Chalfont St Giles



HS2 - Tourism Study, Countryside Sites and Access - CHALFONT ST GILES

Chalfont St Giles is situated on the edge of the Chiltern Hills, four miles from Amersham via the A413. Stations at Chalfont & Latimer and Amersham both provide rail links with London, which is an hour away by car.

The village is particularly noted as the home of Milton's Cottage. Poet and parliamentarian John Milton came here to escape the London plague and it was here that he finished *Paradise Lost* and embarked on plans for *Paradise Regained*. The 16th century cottage and its contents are a remarkable survival, of interest to casual visitors and more serious students.

Old-world buildings, the village green, duck pond and Grade 1 listed parish church give Chalfont St Giles a following with walkers and other visitors in its own right. The churchyard lies on the route of two long-distance footpaths, the Chiltern Way and South Bucks Way. The latter follows the River Misbourne from Chalfont to Old Amersham, from where a loop branches back to the village to complete a 6-mile circular walk.

Chalfont St Giles village centre is well served by pubs. Those which are favoured by visitors are The Fox & Hounds, The Milton's Head and The Merlin's Cave. Staying visitors have the choice of

The White Hart, or The Ivy House on the edge of the village. The nearby Chiltern Open Air Museum contributes to visitor numbers in Chalfont St Giles: the museum has rescued and re-erected some 30 Chilterns buildings on its 45-acre site. Two notable events also swell visitor numbers: the annual Chalfont St Giles Show comprises over 100 traders and attracts over 5000 people; the biennial Chalfont St Giles & Jordans Literary Festival was established in 2006 and has been growing in stature ever since.

Chalfont St Giles also encompasses the small village of Jordans, established and built by Quakers in the early 20th century as a community where artisans could ply their trades and skills. The village receives many American visitors as William Penn, the founder and first governor of Pennsylvania, is buried in the grounds of the 17th century Friends Meeting House together with other members of his family.

Jordans Quaker Centre, which is attached to the Meeting House, can be hired for many uses including day-conferences, training and business meetings and retreat days. The nearby YHA Jordans operates all year round and is open to all ages, including families and groups.

Tourism key facts:

- **11,000 overnight visitors**
- **342,000 day visitors**
- **£8.4 million direct visitor expenditure**
- **£9.2 million total expenditure benefiting local businesses**
- **322 local jobs supported**

Table 25: Total number of visitors in Chalfont St Giles

	Number	Proportion
Staying in commercial accommodation	3,346	1%
Staying with friends and relatives	7,735	2%
<i>Sub-total for all overnight</i>	<i>11,081</i>	<i>3%</i>
Visiting for the day	342,000	97%
Total visitors	353,081	100%

Table 26: Total visitor expenditure in Chalfont St Giles

	Expenditure	Proportion
Staying in commercial accommodation	£915,000	11%
Staying with friends and relatives	£1,081,000	13%
<i>Sub-total for all overnight</i>	<i>£1,996,000</i>	<i>24%</i>
Visiting for the day	£6,395,000	76%
Total direct visitor expenditure	£8,391,000	100%
Total expenditure with multiplier impact	£9,202,000	

Table 27: Average trip length and spend in Chalfont St Giles

Average trip length for overnight visitors	3.2 nights
Average daily spend for overnight visitors	£42.47
Average daily spend for day visitors	£18.71

Figure 15: Distribution of visitor expenditure by sector & visitor type

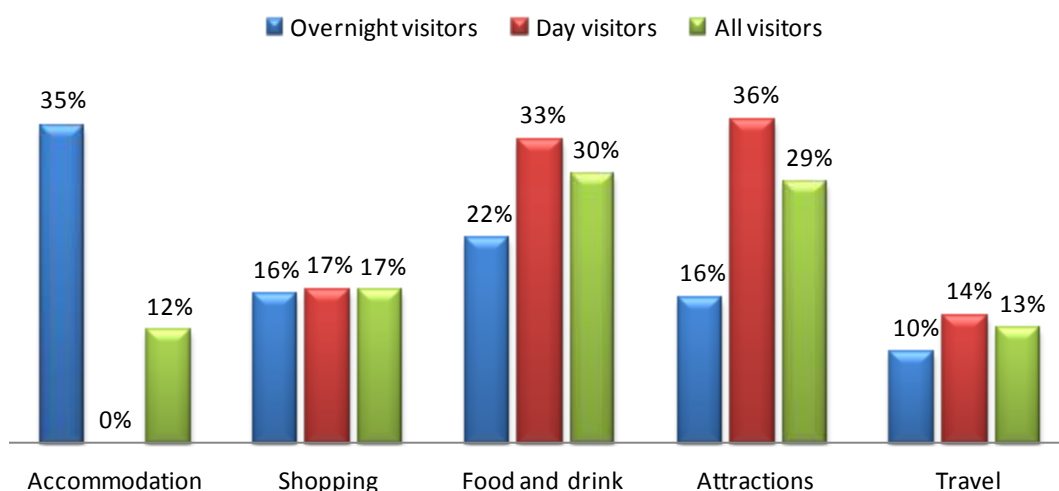


Table 28: Total FTE & Actual jobs supported by Tourism in Chalfont St Giles

	FTE	Actual
Direct	116	174
Indirect	22	25
Induced	108	123
Total jobs 2013	246	322

Summary of tourism in Chalfont St Giles

Accommodation Establishments

There are 7 visitor accommodation establishments in Chalfont St Giles, offering a total of 62 bedspaces. There is also a large camping and caravanning park – Highclere which offers 65 tent pitches and 60 caravan/motorhome pitches.

Visitor Attractions

- Bekonscot Model Village (170,000 visitors pa)
- Chilterns Open Air Museum (39,000 visitors pa)
- Milton's Cottage Museum – has international appeal
- Chalfont St Giles Information Centre
- Rowan Garden Centre and Seasons Café
- Jordans Quaker Centre – burial site of William Penn
- There are a number of sporting attractions including Chalfont Valley Equestrian, Harewood Downs Golf club and Oakland Park Golf Club.
- Hodgemoor Woods, Chalfont St Giles – Forestry Commission woodland with waymarked walking and horse-riding routes, and Access for All trail.
- Historic church in Chalfont St Giles

Restaurants/cafes

There are 2 cafes/restaurants which are known to be popular with leisure visitors and where visitor spend makes a substantial contribution.

Pubs

There are 5 pubs.

Retail

Rowan Garden Centre brings people into the area and relies on leisure visitors.

Events

- Chalfont St Giles and Jordans Literary Festival
- Chalfont St Giles Country Show & Fun Run – 5,000 people
- Bucks Open Studio, Heritage Open Days and National Garden Scheme (2 gardens). There is a Chalfonts Art Trail as part of the Bucks Open Studio.

Promoted walking and cycling routes

- The Chiltern Way
- The South Bucks Way
- Chiltern Heritage Trail

5.3 Chesham



Chesham Clock Tower

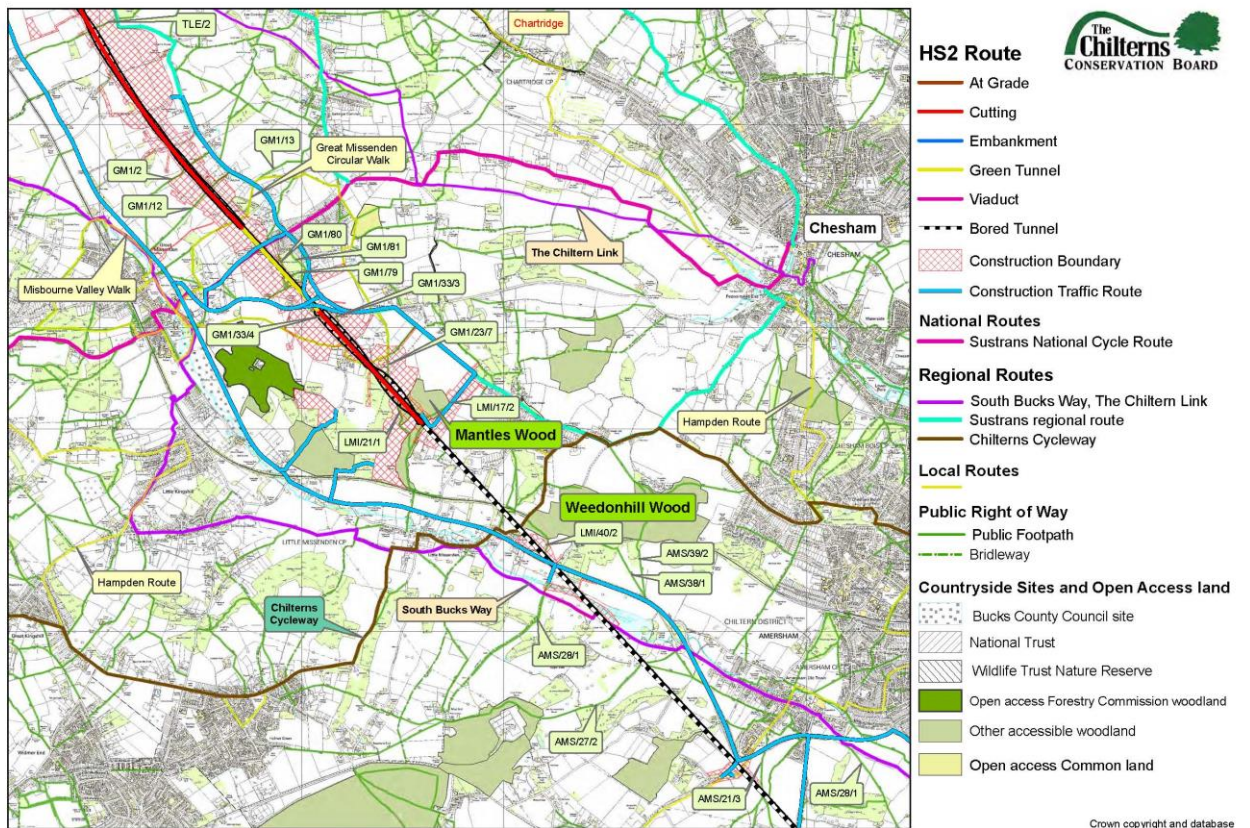


Chesham farmer's market



Local walking trail

Figure 16: HS2 Corridor - Chesham



HS2 - Tourism Study, Countryside Sites and Access - CHESHAM

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The market town of Chesham sits in the valley of the River Chess, amongst the wooded folds of the surrounding hills. The town is linked to London and nearer neighbours by its own branch of the Metropolitan Line, which joins main line Chiltern Rail services at Little Chalfont.

The River Chess meanders beside footpaths, through water gardens and other green spaces to provide one of Chesham's many attractive features. Chief amongst these are the Old Town and the Market Square, the location of the Chesham Museum. The Market Square is also the site of a thriving bi-weekly market selling locally-made goods and produce. The award-winning Local Producers Market take place monthly. The Old Town is comprised mainly of the 17th & 18th century cottages of Church Street and Germain Street, and St Mary's church and adjacent Lowndes Park. Several parts of the town are used regularly as locations for TV and films. For example, many recent TV advertisements have been shot in the High Street, while Church Street provided the setting for scenes in *The Imitation Game*, the newly-released film about code – breaker Alan Turing.

Chesham has no hotels, so its staying visitors are served by B&Bs and some self-catering accommodation. Most establishments are located in the countryside around the town, including the substantial Chartridge Conference Centre.

Trains to Chesham deliver visitors to the heart of some of the finest walking country in the Chilterns. The town applied for and was awarded Walkers are Welcome status as a key part of its regeneration strategy. It is the only town in the AONB to hold this title. An illustration of just some of the walking leaflets which feature Chesham gives some indication of the range and quality of the walking experience. In line with AONB policy, the four latest leaflets produced by Chesham Walkers are Welcome feature routes between Central Chiltern stations, which enable visitors to leave the car at home. As with the majority of Chiltern country walks, they encourage walkers to patronise the pubs and shops of villages encountered en route. The new Chesham Food Trails picks up on this: they feature outlets for local produce, from farm shops to the High Street, demonstrating how visitor spending is directed to benefit a variety of businesses both in and around the town.

Cyclist are equally well-served by the network of quiet lanes leading out of Chesham, which is a Cycle Chilterns gateway town. The routes which they offer include National Cycle Network Route 57 and the Chilterns Cycleway. The Pednor Vale, which stretches along the vale from Church Street, is the most frequented of all routes. The annual Tour de Pednor has grown into a significant event, involving cyclists from a wide area.

Chesham's countryside is the main draw for visitors, but it is the town itself which benefits. In recent years, Chesham town centre has seen clear signs of revitalisation in which visitor spending plays its part. In particular, an influx of cafes has done much to stimulate the health of the high street. Walkers and other visitors find plenty of places to stop and eat: remarkably, there are no fewer than 17 cafes in the relatively small stretch of Chesham's pedestrianised town centre.

Entertainments and events also boost visits to the town. The Elgiva theatre puts on an extensive programme of live shows and other entertainments which serve the town and outlying communities. The 'annual BuryFIELD comedy day is a 'sell-out' as is Christmas late night shopping in the High Street.

Tourism key facts:

- **22,900 overnight visitors**
- **407,000 day visitors**
- **£13 million direct visitor expenditure**
- **£14.6 million total expenditure benefiting local businesses**
- **471 local jobs supported**

Table 29: Total number of visitors in Chesham

	Number	Proportion
Staying in commercial accommodation	7,214	2%
Staying with friends and relatives	15,631	4%
<i>Sub-total for all overnight</i>	22,845	5%
Visiting for the day	407,000	95%
Total visitors	429,845	100%

Table 30: Total visitor expenditure in Chesham

	Expenditure	Proportion
Staying in commercial accommodation	£2,182,000	17%
Staying with friends and relatives	£2,185,000	17%
<i>Sub-total for all overnight</i>	£4,367,000	34%
Visiting for the day	£8,600,000	66%
Total visitors	£12,967,000	100%
Total expenditure with multiplier impact	£14,670,000	

Table 31: Average trip length and spend in Chesham

Average trip length for overnight visitors	3.7 nights
Average daily spend for overnight visitors	£51.36
Average daily spend for day visitors	£21.13

Figure 17: Distribution of visitor expenditure by sector & type

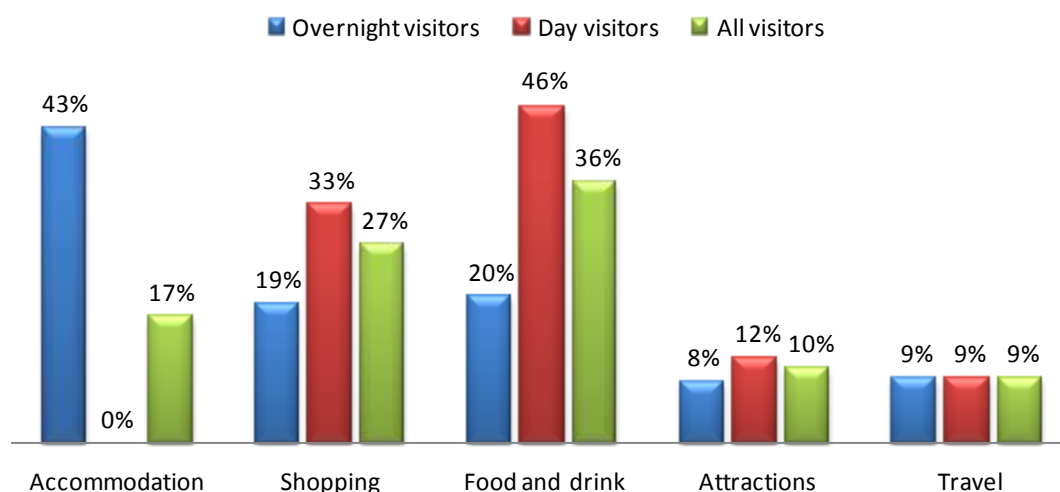


Table 32: Total FTE & Actual jobs supported by Tourism in Chesham

	FTE	Actual
Direct	206	302
Indirect	42	48
Induced	107	122
Total jobs 2013	355	471

Summary of tourism in Chesham

Accommodation Establishments

There are 4 visitor accommodation establishments in Chesham, offering a total of 24 bedspaces. However just outside Chesham Chartridge Lodge Conference Centre offers an additional 111 bedspaces.

Visitor Attractions

- The Elgiva Arts & Entertainment Centre
- Chesham Lido
- Chesham Museum
- Chartridge Park Golf Club brings in substantial numbers of visitors from outside the area.
- Historic church.

Restaurants/cafes

There are 11 cafes/restaurants in Chesham which are known to be popular with leisure visitors and where visitor spend makes a substantial contribution.

Pubs

There are 15 pubs in and around Chesham, mostly in scenic rural locations just outside Chesham such as Ashley Green and Ley Hill. Most of these are popular eateries, the quality and character of many of these attract people into the area. Many are heavily frequented by leisure walkers and cyclists.

Retail

Chesham has a large range of independent shops. There are 15 shops which rely on leisure visitors.

Events

- Farmers market and Local Producers Market
- There are lots of walking and cycling events, health walks, Sportives and charity challenge rides.
- There are regular community events in Chesham (Christmas Evening) and large events which attract thousands of visitors from far afield (BURYFields Festival of Music and Comedy, Ley Hill Beer and Music Festival, Tour de Pednor Bike Ride)
- Bucks Open Studio, Heritage Open Days and National Garden Scheme (3 gardens). There is a Chesham Art Trail as part of the Bucks Open Studio.
- Heritage Open Days has a large number of participants in Chesham (8 attractions in 2014).

Promoted walking and cycling routes

Chesham is a Walkers Welcome town and a Cycle Chilterns gateway town and offers a wide range of promoted routes. The popular Chess Valley walk starts from Chesham and there are no less than 20 circular walk leaflets produced and promoted by Chesham Walkers are Welcome. There is also a Chesham Food & Drink Trail.

- Chess Valley Walk
- Chilterns Cycleway
- National Cycle Network Route 57
- Chiltern Heritage Trail
- Series of 20 circular walks from Chesham produced by Chesham Town Council and Chesham Walkers are Welcome
- Chesham Food & Drink Trail

5.4 Great Missenden



Missenden Abbey

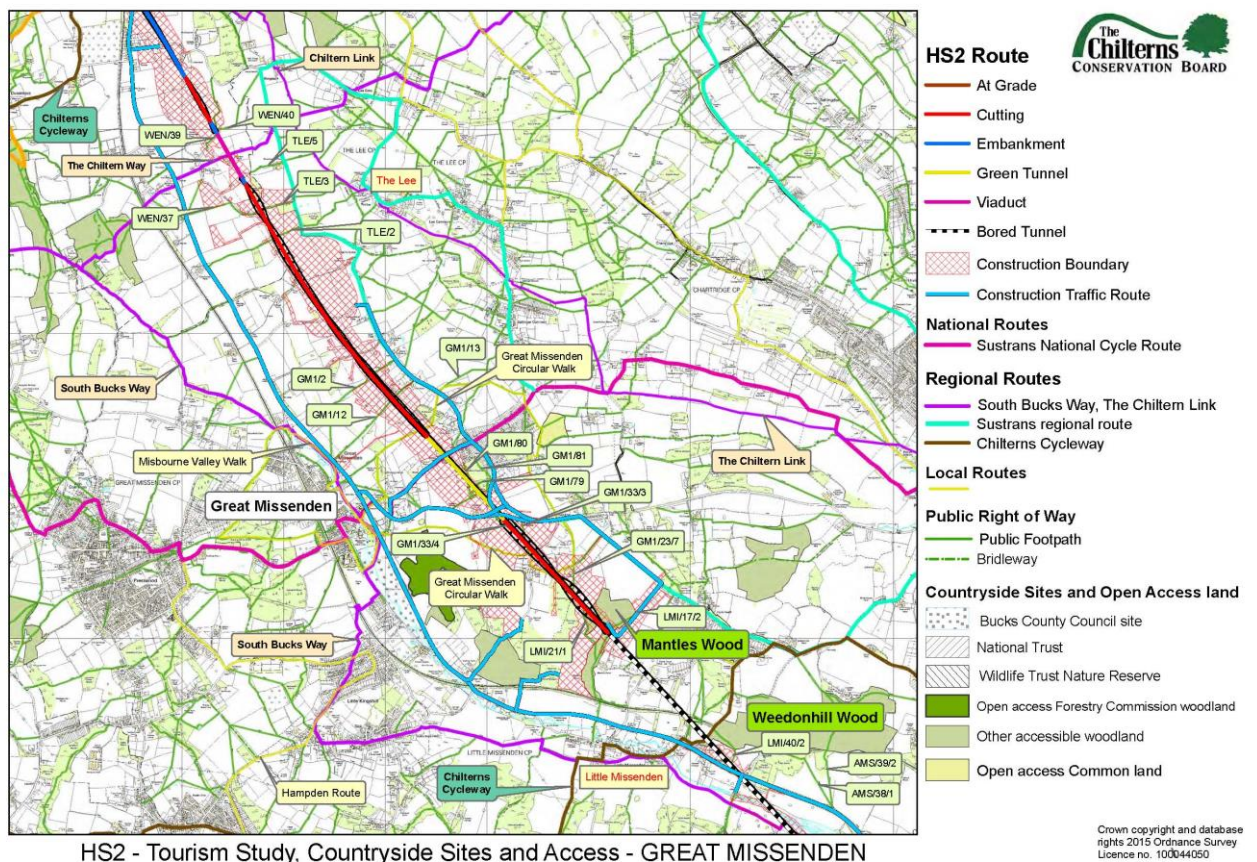


Cycling in the Chilterns



Red Lion, Little Missenden

Figure 18: HS2 Corridor - Great Missenden



Great Missenden

The London to Aylesbury Chiltern Line serves Great Missenden and links it to Amersham, Wendover and other Central Chiltern towns.

For many of today's visitors, it is the connection with Roald Dahl that puts the village of Great Missenden on the map. For others, it is the lure of walks and cycle rides in the surrounding Chilterns countryside, of leisure shopping in the village centre or conferences, courses, weddings and events at Missenden Abbey.

Roald Dahl lived and wrote in Great Missenden for 36 years and the village bears many reminders of the man and his work. Central to them all is the award-winning Roald Dahl Museum and Story Centre, whose colourful façade strikes a contemporary note in the narrow, old-world High Street. The Museum attracts families, schools and groups to its galleries, its busy programme of holiday activities, its well-stocked shop and Café Twit. A new feature film adaptation of Roald Dahl's much-loved classic *The BFG*, directed by Steven Spielberg, is planned

for release in 2016 and will boost visitor numbers further. Visitors can take two themed trails from the Museum. The Village Trail takes in iconic features which appear in Roald Dahl's books, finishing at his grave in the churchyard of the Medieval parish church. The Countryside Trail takes in woodlands which also feature in his work. There is also a murder mystery trail around the village created by the Church of England primary school which attracts many visitors.

Independent retailers add an equally strong inducement to spend time and money in Great Missenden. The majority of shops in the High Street, Church Street and Station Approach, most of which are family businesses, successfully target visitors with their innovative selection of quality goods and their high standards of presentation. Their retail offering ranges from gifts, furnishing and other items for the home and garden to women's clothing and bespoke jewellery. Some of these businesses are long established, such as, for example, the St Andrew's Christian Bookshop which began life in 1957 as a few books displayed on a table of the chiropodist in the High Street. Art is now also a draw for visitors: the gallery at One Church Street stages exhibitions of innovative contemporary art; the Carina Haslam Art Gallery in the High Street lists such prestigious clients as Fortnum and Mason and the House of Lords.

Country walks begin right at Great Missenden station, so walkers can leave the car at home. The choices starting at the station include popular circular walks along the Misbourne Valley to Little Missenden, Amersham and Chalfont St Giles.

Great Missenden is a Cycle Chilterns gateway and there are numerous signposted cycle routes, including National Cycle Network Route 57. The Bicycle Workshop & Cycle Chilterns Bike Hub is also conveniently located here in Great Missenden. The Hub offers guided rides and the hire of leisure and electric bikes which can be delivered for pick up by customers in other locations.

Facilities provided by Missenden Abbey are a significant draw for visitors. The historic abbey is a dedicated conference, wedding and events venue with 22 meeting rooms and accommodation for 114 people. It is a busy centre for adult learning weekend and day courses and for events which include afternoon tea, Murder Mystery nights, Proms, Craft Fairs and family functions.

The Abbey bedrooms are open to groups and individuals for B&B. Further accommodation is provided in B&Bs in the village, in rooms above Origins wine bar / restaurant in the High Street and at the 15th century Nag's Head inn on the edge of the village. The Nag's Head holds an AA Rosette for "Culinary Excellence" and was a regional winner for Publican Magazines' "Food Pub of the Year" and "Accommodation Pub of the Year". In the village itself, a further choice of places to eat includes the 16th century Cross Keys, La Petite Auberge and the Black Horse – a traditional launching site for hot air balloons.

Nearby Great Missenden is the National Trust Hughenden Manor (once home of Disraeli) and Hampden House, now an impressive wedding venue that brings visitors to stay in the area

Little Missenden

Little Missenden sits beside the River Misbourne just off the A413 between Great Missenden and Amersham. It is a small and peaceful village of considerable charm, which has served as the location for episodes of many TV series including *Midsomer Murders* and *Poirot*. Buildings of note include its superb Jacobean manor house and the Saxon-cum-Norman church which has some very fine 12th – 17th century wall paintings. The church is the main setting for the annual Little Missenden Festival of Music and the Arts which has an unbroken tradition of high quality music making stretching back 55 years. The Festival brings visitors from London and further afield. Visitor numbers are further boosted by tour groups visiting the church and village due to the Midsomer Murders filming, many of them from the Continent.

Other focal buildings include two pubs, the half-timber Red Lion and The Crown, both of which offer accommodation. The South Bucks Way leads walkers through the village, following the River Misbourne on its route to Amersham. The path passes along the edge of the lake of Shardeloes Park which was laid out by Humphrey Repton in 1793. The 500-acre Shardeloes

Farm Equestrian Centre is a long-established family business with a riding school, off road hacking, livery service and events.

The Chilterns Cycleway passes through Little Missenden and the network of country lanes and bridleways make this a popular choice for cyclists.

The Lee

The Lee has won an international following in its own right. The village was largely shaped by Sir Arthur Lasenby Liberty, the founder of Liberty's store who bought the manor estate in 1898. Sir Arthur reshaped The Lee into a picturesque village, with pretty cottages and what is now the Cock and Rabbit Inn set around the village green. He also helped to restore the historic Old Church and fund work on the new Church, both tucked away behind the green. Sir Arthur also built "Pipers" just off the green: its entrance is guarded by the wooden figurehead of Admiral Lord Howe taken from HMS Impregnable (previously called HMS Howe) the navy's last wooden warship, whose timbers were used in the mock Tudor extension to Liberty's store.

Together with Little Missenden, this part of The Lee provided the main locations for the first episode of Midsomer Murders, establishing idyllic Chilterns scenery as the hallmark of its many series. The numerous episodes filmed here since have given The Lee world-wide publicity, putting the village on the tourist trail. Visitor spending brings considerable benefit to the Cock and Rabbit Inn and its Graziemille Restaurant, and to the village shop which lies at the heart of the community. The shop, which is financed and run by the village, passes on the benefit to other businesses by its promotion of local produce.

There is a dense network of footpaths around the Lee and it is a popular start point for walks, featured in many walking guides to the Chilterns

Tourism key facts (Great and Little Missenden combined, and the Lee):

- **32,300 overnight visitors**
- **565,000 day visitors**
- **£15.8 million direct visitor expenditure**
- **£18.6 million total expenditure benefiting local businesses**
- **829 local jobs supported**

Table 33: Total number of visitors in Great & Little Missenden

	Number	Proportion
Staying in commercial accommodation	8,527	1%
Staying with friends and relatives	23,570	4%
<i>Sub-total for all overnight</i>	<i>32,325</i>	<i>5%</i>
Visiting for the day	565,000	95%
Total visitors	597,325	100%

Table 34: Total visitor expenditure in Great & Little Missenden

	Expenditure	Proportion
Staying in commercial accommodation	£2,033,000	13%
Staying with friends and relatives	£3,264,000	21%
<i>Sub-total for all overnight</i>	<i>£5,297,000</i>	<i>33%</i>
Visiting for the day	£10,555,000	67%
Total visitors	£15,852,000	100%
Total expenditure with multiplier impact	£18,607,000	

Table 35: Average trip length and spend in Great & Little Missenden

Average trip length for overnight visitors	3.9 nights
Average daily spend for overnight visitors	£44.82
Average daily spend for day visitors	£18.68

Figure 19: Distribution of visitor expenditure by sector & visitor type

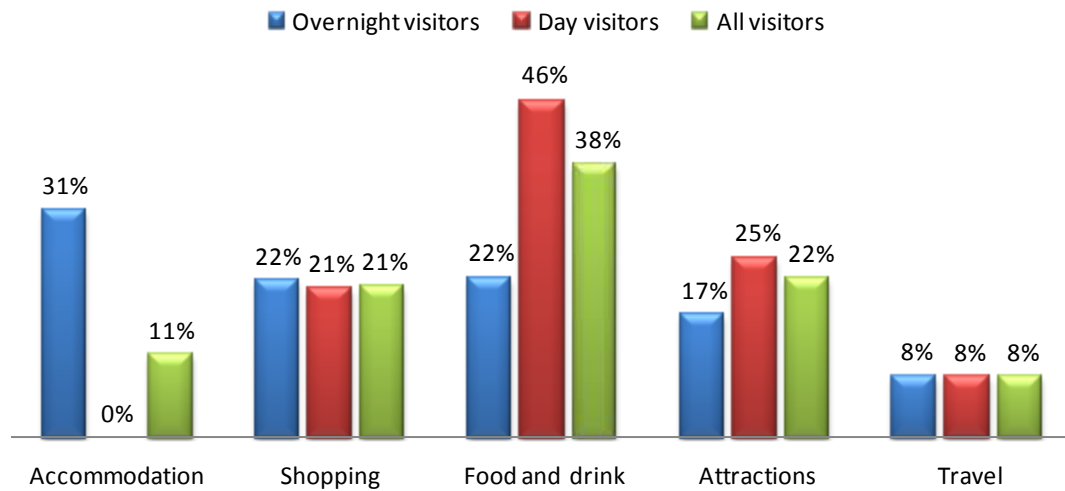


Table 36: Total FTE & Actual jobs supported by Tourism in Great & Little Missenden

	FTE	Actual
Direct	415	608
Indirect	53	61
Induced	141	160
Total jobs 2013	609	829

Summary of tourism in Great Missenden, Little Missenden and The Lee

<p>Accommodation Establishments</p> <p>There are 12 visitor accommodation establishments, offering at total of 174 bedspaces, most being small with the exception of Missenden Abbey (with 114 bedspaces).</p>
<p>Visitor Attractions</p> <ul style="list-style-type: none"> • Roald Dahl Museum and walking trail – attracts national/international visitors and regular school groups (68,000 visitors pa) • Missenden Abbey – Conference Centre, B&B, courses and events • Peterlee Manor Farmshop, Café & Pick Your Own • Malt the Brewery – brewery tours and shop • European Balloons – hot air ballooning from Great Missenden • Galleries with exhibitions: One Church Street Gallery and Carina Haslam Art Gallery • Affricks Farm Livery and Events • Widmer Equestrian Riding School • Great Missenden historic church and Church cream teas (5,000 visitors pa for Teas) • Historic churches in Little Missenden (including Church teas) and Great Hampden • Hildriths garden centre, café and shops • Rest Home for Horses, Speen • Lacey Green Windmill, Lacey Green • Hughenden Manor, Hughenden Valley (101,572 visitors pa)
<p>Restaurants/cafes</p> <p>There are 13 cafes/restaurants in Great Missenden which are known to be popular with leisure visitors and where visitor spend makes a substantial contribution.</p>
<p>Pubs</p> <p>There are 16 pubs in and around Great Missenden. Most of these are popular eateries, the quality and character of many of these attract people into the area. The Cock and Rabbit has an international appeal due to its Midsomer Murders connections. Many of the pubs are in very scenic locations, such as the Old Swan and the Hampden Arms, and are heavily frequented by leisure walkers and cyclists.</p>
<p>Retail</p> <p>Great Missenden has a thriving High Street, with lots of independent shops. There are 18 shops which rely on leisure visitors, mainly fashion boutiques, gift shops and speciality crafts/galleries.</p>
<p>Events</p> <ul style="list-style-type: none"> • Thursday market and monthly farmers market. • There are lots of walking and cycling events, health walks, Sportives and charity challenge rides. • There are regular community events in Great Missenden (May Fair, Christmas Evening) and large events which attract thousands of visitors from far afield - Hyde End Spring and Autumn Craft Fairs, Chiltern Steam Rally, Little Missenden Festival Music and the Arts (500 visitors pa) and Lighthouse Christian Camp (1,500 visitors pa). • Bucks Open Studio, Heritage Open Days and National Garden Scheme (3 gardens) (as well as entry to Gypsy House where Roald Dahl lived))
<p>Promoted walking and cycling routes</p> <p>Great Missenden is an important gateway to the Chilterns countryside, with a wide range of promoted routes. It is a Cycle Chilterns gateway town and is currently receiving considerable investment in cycle hire facilities. Bike hire is now available at two locations in Great Missenden. It is a popular location for cycling and walking events, from Sportives to high-profile events such as the recent Tour of Britain.</p> <ul style="list-style-type: none"> • Chilterns Cycleway (signed link to the Chilterns Cycleway) • National Cycle Network Route 57 – an important regional route • Great Missenden Circular Walk • Walks in the Misbourne Valley • South Bucks Way • Angling Spring Wood – audio trail and stile-free route • The Chiltern Link (1.5 miles from Great Missenden) • The Chiltern Way (2 miles from Great Missenden) • Walking trails around Great Missenden, eg Murder Mystery Trail, Roald Dahl trail

The 700 hectares of Wendover Woods, which are managed by the Forestry Commission, are another major outdoor attraction. A notable centre for mountain biking and cycling, they also provide an adventure playground, Go Ape, fitness trails, bird and wildlife watching, educational days, corporate days, BBQs and a café.

The make-up of Wendover's High Street clearly reflects its popularity with visitors and the influence of their spending on the town. Dating back to the 16th century, The Red Lion Hotel offers 23 recently-refurbished bedrooms and now holds a licence for civil weddings. In addition to gift shops, other outlets which thrive on the leisure economy include two very spacious and well-established antique shops, the prestigious Aces High Aviation Gallery, Rumsey's Chocolaterie and Café and a highly acclaimed delicatessen and wine shop at No 2 Pound Street – all of which occupy attractive 16th and 17th century buildings. A regular Thursday market brings in shoppers from surrounding communities and a 24-stall monthly farmers' market attracts people from further afield.

Adjacent to Wendover Woods, the RAF village of Halton must also be considered a part of Wendover's visitor offering. The Wendover Arm of the Grand Union Canal, undergoing renovation by the Wendover Arm Trust, links the centre of Wendover to the historic core of the village, once owned and largely remodelled by the Rothschild family. The buildings of the conservation area are characterised by a flamboyance of style which includes decorative plaster panels that are distinctive to Halton. The nearby churchyard of the Church of St Michael and All Angels is also of interest as it contains the graves of servicemen from the First and Second World Wars. RAF Halton itself attracts hundreds of visitors to its ceremonial Passing Out Parades. It also houses the Trenchard Museum, which relates the history of the base. The annual Heritage Open Days weekend offers a hugely popular opportunity for members of the public to visit Halton House; built for Alfred de Rothschild in 1883 in the style of a French château, the house now serves as RAF Halton's officers' mess.

Tourism key facts Wendover:

- **28,500 overnight visitors**
- **438,000 day visitors**
- **£14.6 million direct visitor expenditure**
- **£16.2 million total expenditure benefiting local businesses**
- **520 local jobs supported**

Table 37: Total number of visitors in Wendover

	Number	Proportion
Staying in commercial accommodation	19,411	4%
Staying with friends and relatives	9,056	2%
<i>Sub-total for all overnight</i>	28,467	6%
Visiting for the day	438,000	94%
Total visitors	466,467	100%

Table 38: Total visitor expenditure in Wendover

	Expenditure	Proportion
Staying in commercial accommodation	£5,138,000	35%
Staying with friends and relatives	£1,266,000	9%
<i>Sub-total for all overnight</i>	£6,404,000	44%
Visiting for the day	£8,187,000	56%
Total visitors	£14,591,000	100%
Total expenditure with multiplier impact	£16,212,000	

Table 39: Average trip length and spend in Wendover

Average trip length for overnight visitors	2.9 nights
Average daily spend for overnight visitors	£80.37
Average daily spend for day visitors	£18.69

Figure 21: Distribution of visitor expenditure by sector & visitor type

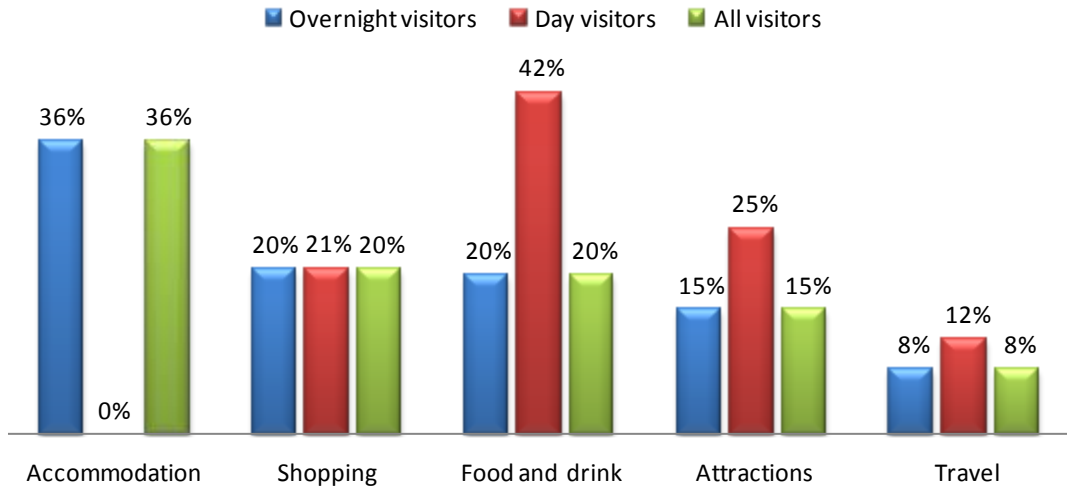


Table 40: Total FTE & Actual jobs supported in Wendover

	FTE	Actual
Direct	226	330
Indirect	49	56
Induced	118	135
Total jobs 2013	392	520

Summary of tourism in Wendover

Accommodation Establishments

There are 4 visitor accommodation establishments offering 128 bedspaces in Wendover itself, most notably the Red Lion Hotel. However there are a further 4 establishments just outside Wendover, encompassing Aston Clinton and Weston Turville, that visitors to Wendover use. These add a further 307 bedspaces, with 278 of these attributed to the Holiday Inn at Aston Clinton, 3 miles from Wendover.

Visitor Attractions

- Wendover Woods (**350,000 visitors pa**) and Go Ape (11,416 visitors pa)
- Aston Hill Biking Centre – premier downhill mountain bike centre
- The Ridgeway National Trail (5 walking tour operators offer overnight stops in Wendover as part of itinerary)
- Chiltern Forest Golf Club
- Grand Union Canal – waymarked trails
- Coombe Hill National Trust countryside attraction
- Bacombe Hill Nature Reserve
- Trenchard Museum, Halton
- The Chiltern Brewery (shop, tastings and brewery tours)
- Worlds End Garden and Retail Centre, café/restaurants
- Aces High Aviation Gallery and The Military Gallery
- Historic church and cream teas

Restaurants/cafes

There are 11 cafes/restaurants in Wendover which are known to be popular with leisure visitors and where visitor spend makes a substantial contribution. These includes Rumsey's Chocolaterie Café and No. 2 Pound Street.

Pubs

There are 8 pubs in and around Wendover and a further 3 in Weston Turville.

Retail

Wendover has a thriving High Street, with lots of independent shops. There are 18 shops which rely on leisure visitors, mainly fashion boutiques, gift shops, antiques and speciality food & drink.

Events

- Thursday market and monthly 24-stall farmers market.
- There are lots of walking and cycling events, health walks, Sportives and charity challenge rides.
- There are regular community events in Wendover, and regular RAF/sporting events in nearby Halton (Passing out parades, Halton Village fete).
- Bucks Open Studio, Heritage Open Days (Halton) and National Garden Scheme (two gardens)

Promoted walking and cycling routes

Wendover is an important gateway for a wide range of walks and rides, ranging from short circular walks to long-distance routes. There are lots of sporting events which take place in and around Wendover.

- The Ridgeway National Trail (a nationally promoted route important for tourism)
- The annual Chilterns 3- peaks challenge (stage 1 involves Wendover) (1000 taking part)
- The Chilterns Cycleway
- National Cycle Network Route 57
- Chilterns Country Views of the Vale (promoted by Chiltern Railways and popular with Londoners arriving by train).
- The Icknield Way Trail Riders Route
- The Chiltern Link
- The Aylesbury Ring

6 Appendix 1: Comparison of 2007 Tourism Survey with 2014 Survey

6.1.1 It is important that the differences between the 2007 Survey and the latest 2014 Survey are understood. The scope of the 2014 study is clearly narrower, as it just focuses on the HS2 corridor, but there are other significant differences:

- It uses more recent and accurate data to assess the size of the multipliers that increase the actual spend – the multipliers are now much smaller
- It uses different source data for assessing the amount of spend by tourists – the figures are much larger, and larger than would be accounted for by price inflation between 2007 and 2014
- It only examines the tourist income from visitors coming to the area, and not the much bigger numbers of local resident tourists who spend on tourism and leisure activities. A very rudimentary estimate has been made for the purposes of the table below

6.1.2 The results for the two surveys are shown below.

Analysis of the 2007 and 2014 surveys on Tourism both conducted by Tourism South East			
	2007 (Chilterns AONB Visitor Survey)	2014 (HS2 corridor Visitor survey in AONB)	Notes
Relevant Statistics			
Area in square kilometres	833	191	The HS2 corridor represents 23% of the whole Chilterns AONB in sq metres
Survey results (rounded)			
1. Annual Visitors (excluding local resident visitors)	10.6m	2.3m	This suggest about 1 in 5 visitors to the Chilterns AONB come to visit the HS2 corridor – in line with its size in sq km
2. Annual visitor spend (excluding local resident visitors)	£107m	£71m	This shows a much higher spend per visitor in the latest HS2 corridor 2014 survey – see point 5 below
3. Annual spend including multiplier effects	£149m	£80m	The multipliers used for the 2014 survey are much lower (1.12) than was used in the 2007 survey (1.40). This reduction reflects new work and is more accurate – it is what is recommended by Government based on more recent research for the local level in rural areas
4. Average spend per visitor (excl local resident visitors)	£14/visitor	£35/visitor	This increase in the 2014 survey is due to <ul style="list-style-type: none"> • 2007 survey now being old (price inflation would increase the £149m to just over £180m); • The use in the 2014 survey of spend averages from national surveys (for the Chilterns), rather than the local surveys used for the 2007 study (that were rural based where often people were spending less and hence give much lower figures). If the 2007 study were redone the spend would be higher

Table continued overleaf

5. Annual visitor spend (including local resident visitors)	£337m Incl expenditure from 44million visits a year by people living in AONB)	£94.2m Incl expenditure from 2.2 million visits a year by people living within the HS2 Corridor (approx 20% of total AONB population)	The 2014 survey did not cover local resident visitors. As the focus was on tourism, only visits and expenditure made by people who live outside the AONB has been included. However, local residents also generate income for local businesses whilst they are out on recreational visits. The estimate is very rudimentary and is based on a estimated population of 16,000 (a fifth of the AONB population of 80,000) and draws on the 2007 survey which found that local residents make an average of 143 leisure visits a year. On this basis we can assume that 2.2 million leisure visits a year are made within the HS2 Corridor by local residents. In 2007 the average spend per head was £5.16. This converts to £6.24 today with inflation added. Based on this we can assume that local residents contribute a further £14.2m to the local economy.
6. Total annual spend including multiplier effects	£472m	£105.6m	This is with multipliers added.
7. FTE Jobs supported	11,673	2,073	The number of jobs sustained by visitor spending (including additional multiplier expenditure) in the local area is expressed as Full-Time Equivalent jobs. For example two part-time jobs at 2.5 days each will be expressed as one FTE job. Please note that the 2007 job figure is derived from the total expenditure of £472m which includes local leisure spend. The 2014 study only includes the £80m tourism spend.
8. Total Actual Jobs supported	Not estimated in previous study	2,768	Many of these jobs are part-time or seasonal in nature. Therefore the total number of actual jobs supported is higher.

7 Appendix 2: Overview of Cambridge Model

The Cambridge Model

For almost ten years, regional tourist boards across England have been working with Geoff Broom Associates in developing the Cambridge Model approach to estimate the value and volume of tourism to local authority areas.

The model was developed to provide an affordable method of calculating the value of tourism to local economies through using a range of readily available local data on an area's tourism product to disaggregate a range of regional/ county tourism statistics. The method is popular with local authorities as it is affordable and can readily use available local statistics to generate a view of the volume, value and economic impact of visitor activity in the area. Nevertheless, where additional local data exist e.g. high quality occupancy data, information on profile of visitor structure and associated spend etc – this enables the replacement of regional data in the first stages of the model. Business surveys can also be commissioned to generate local calibration of the economic stage of the model.

Indeed, although the Cambridge Model approach has been frequently labelled as being 'top-down', it is entirely possible to drive the model entirely by locally collected data, and thus introduce 'bottom-up elements'. Furthermore, the model utilises a standard methodology capable of application across the UK, and thus offers the potential for direct comparisons with similar destinations throughout the country.

Methodological Overview

Key Outputs

The model has two stages:

Stage 1: Calculates the volume and value of day and staying visitors to the study area.

Stage 2: Estimates the economic impact of this visitor spending in the local economy.

The Cambridge Model is therefore able to generate indicative estimates for the following:

- The volume of staying trips taken in the District/Town by overseas and domestic visitors
- The volume of visitor nights spend in the District/Town by overseas and domestic visitors
- The number of leisure day visits taken from home to and within the District/Town
- Visitor expenditure associated with these trips to the District/Town, and its distribution across key sectors of the local tourism economy
- The value of additional business turnover generated by tourism activity within the District/Town
- The level of direct, indirect and induced employment sustained by visitor expenditure within the District/Town

Data Sources

In its standard form, the Cambridge Model uses a range of local data including details of accommodation stock, local occupancy rates, population, employment, local wage rates and visits to attractions. It applies this locally sourced information to regional estimates of tourism volume and expenditure derived from the following national surveys:

- Great Britain Tourism Survey (GBTS)
- International Passenger Survey (IPS)
- Great Britain Day Visits Survey (GBDVS)
- Annual Survey of Hours and Earnings
- Census of Employment
- Census of Population 2011
- Labour Force Survey
- Annual Business Inquiry

As highlighted above, the Model allows estimates generated using the above existing data sources to be refined further using locally available survey data – to the extent that it is possible to drive the Model entirely by locally collected data. Locally collected data used in this study include:

- Audit of accommodation stock
- Average room and bed occupancy from local survey
- Number of visits to attractions from local survey

Limitations of Model

The Model relies on a range of data sources, which in turn are based on different methodologies and are estimated to different levels of accuracy. The estimates generated by the Model can therefore only be regarded as indicative of the scale and importance of visitor activity in the local area.

The Model is not designed to provide a precise and accurate measurement of tourism in a local area, but rather to provide an indicative base for monitoring trends

Accuracy of the model

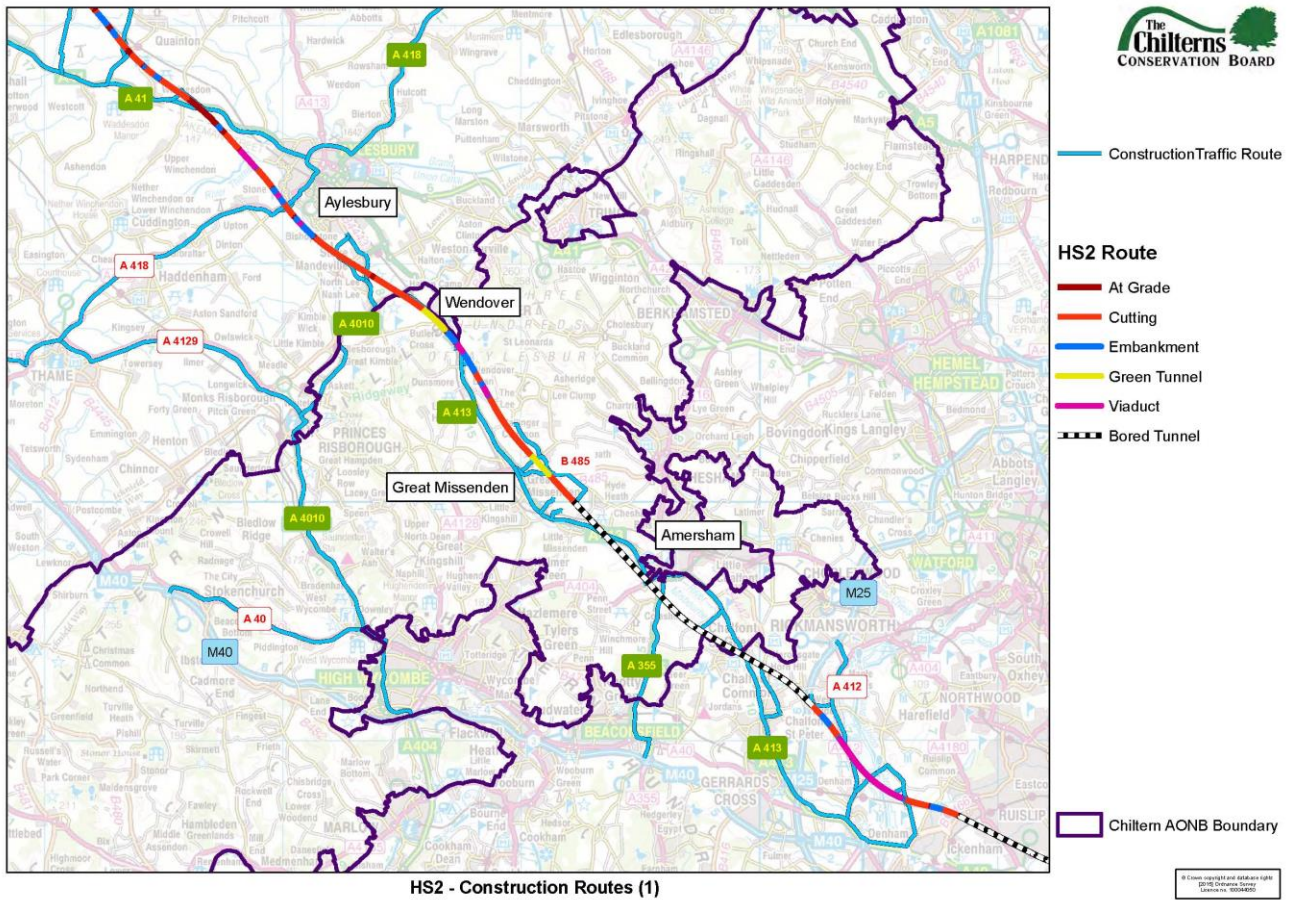
As with all models, the outputs need to be viewed in the context of local information and knowledge. Because of the nature of tourism and the modelling process, this model (as with other approaches) can only produce indicative estimates and not absolute values.

The Cambridge Model approach has been independently validated (R Vaughan, Bournemouth University) and was judged robust and the margins of error acceptable and in line with other modelling techniques. Tourism South East, also implement a number of measures to ensure that outputs are indicative as possible, through working with the local authority to audit accommodation to ensure that data inputs on accommodation capacity are as accurate as possible, and ensuring a high degree of transparency in the process (methodology employed, data used, assumptions made)

As a result, there should be confidence that the estimates produced are as reliable as is practically possible within the constraints of the information available.

8 Appendix 3: Map of HS2 construction route

Figure 22: HS2 Construction Routes 1



HS2 - Construction Routes (1)

Figure 23: HS2 Construction Routes 2

