



Market Research

Hollingworth Fold Glamping

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1.0 Executive Summary

This report is to understand the market for short-term rental accommodation in and around Littleborough to demonstrate the requirement for a 6-unit glamping site plus an additional 3 camping pitches at Hollingworth Fold.

This report will examine whether current accommodation options local to Littleborough and the surrounding areas are sufficient to meet tourist demand. It will also look at tourism trends to suggest if a new glamping site in this area is warranted. This will demonstrate the need for this glamping development, as well as its potential to benefit the local area economically, socially, and environmentally.

To demonstrate the need for and benefit of this development, this report will focus on local tourist demographic, key tourism markets in the area, existing visitor accommodation and demand, and recent tourism trends including glamping. This document will be supported by a PESTLE analysis to understand the external environment within which this development will exist and demonstrate the potential for success.

In summarising this report, a clear demand for this development will be determined and its contribution to the area highlighted. This will encapsulate a strong case for the support of this glamping site – Hollingworth Fold Glamping.



2.0 What is Glamping?

Combining glamour and camping, glamping is a refreshing way to escape the stresses of daily life and get back to nature. It is a style of camping which typically features larger, more luxurious units such as pods, shepherd huts, bell tents and yurts, as well as amenities not usually associated with camping such as ensuite bathrooms, hot tubs, and heating.

The Oxford Dictionary provides the following definition of glamping: -

glamping

['glampɪŋ] 

NOUN

a form of camping involving accommodation and facilities more luxurious than those associated with traditional camping.

"glamping is likely to satisfy any city slicker seeking a little refuge in nature—without foregoing any of life's luxuries"

Figure 1 – Glamping Definition. Source: Oxford Dictionary, 2022.

Providing the luxury of a hotel in the outdoors setting of traditional camping sites, glamping is a great option for the more high-maintenance camper, or those looking to experience a little luxury!



3.0 Tourist Demographic

While statistics for Rochdale Metropolitan Borough Council are not currently available, the Greater Manchester Area as a whole has a thriving tourism market. The latest figures available were from 2019 and showed a significant increase in the number of visits, with overall visitor spend and nights spent also increased, albeit at a lesser extent (VisitBritain, 2021).

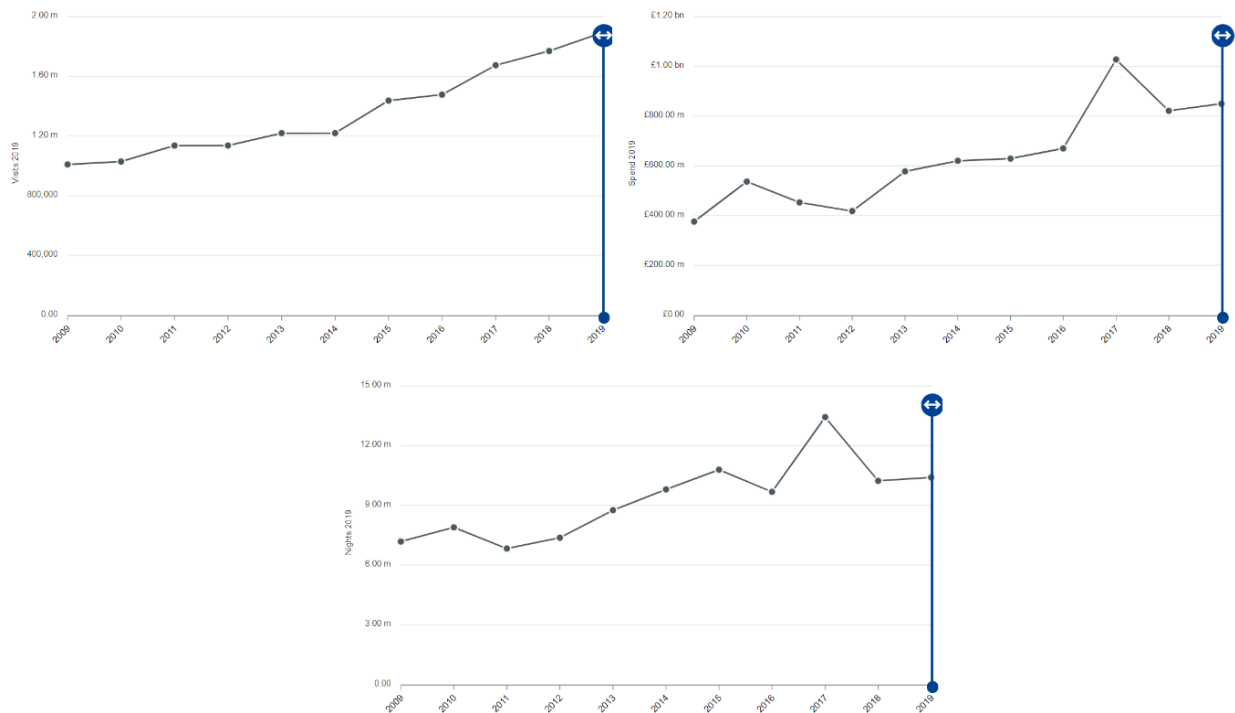


Figure 2 – Inbound Tourist Data. Source: VisitBritain, 2021.

For Hollingworth Fold Glamping, industry knowledge and prior experience tells us that the key tourist demographic will likely be domestic tourists. This is supported by the increasing trend of “staycations” (Shilling, 2021), something which the glamping industry has grown largely as a result of.

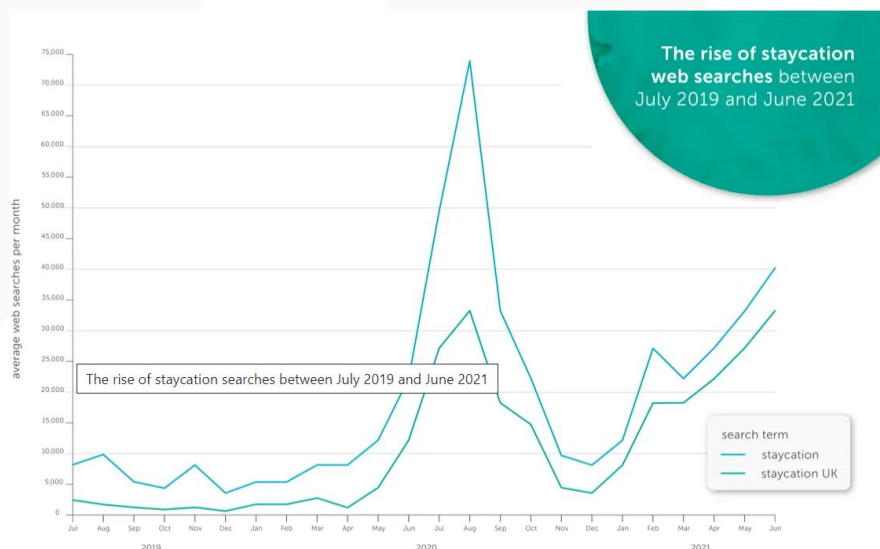


Figure 3 – Rise of Staycations. Source: Shilling, 2021.

Additionally, under 35's account for the largest proportion of visitors, with glamping attracting the most affluent visitors (NEC Group, 2022).

Latest figures from Visit Britain show a per UK-based visitor holiday spend in England of nearly £22,233 million across over 337.3 million nights, breaking down to £66 pounds per night between April and December of 2021.

England total	Q2 2021 (April-June)	Q3 2021 (July-September)	Q4 2021 (October-December)	Q2-Q4 2021 (April-December)
Trips (million)	19.7	43.1	37.4	100.2
Spend (£ million)	£3,807	£10,426	£7,999	£22,233
Nights (million)	69.8	150.2	117.3	337.3

Figure 4 – GB Domestic Overnight Tourism: Latest Results: Source: Visit Britain, 2021.

Applying these figures to the project near Littleborough shows the potentially significant economic impact this proposal will have on the local economy. The pods at this development will offer 24 bed nights per day. Assuming a 70% occupancy rate, development will allow for an additional 6,132 bed nights per year. This would account for over **£404,712** per annum of expenditure in Rochdale, based on a £66 spend per night as shown in figure 4. Significantly, over the first 10-year period, this development would generate an estimated **£4.04 million** for the local economy. Importantly, the site will provide 3 tent pitches in addition to the pods included in the above calculations. The extra guests that these will accommodate mean that these figures may actually be conservative compared to the potential spend generated by guests to the site.

Although statistics specific to the Rochdale Borough area are not available at present, we strongly believe that the scale of the tourism industry in the region overall demonstrates the demand for visitor accommodation and supporting this development would be a positive step for the Council to take, allowing for more tourist accommodation to be provided in the area and boosting the local economy accordingly.

4.0 Key Tourism Markets

4.2 Attractions

The region is home to a plethora of historic sites and attractions, all within a suitable distance from the proposed glamping site. TripAdvisor lists 11 attractions in the immediate Littleborough area, with some of these being located at within the country park that will also house the proposed development – namely Hollingworth Lake Adventure & Water Activity Centre. The provision of these outdoor activity facilities effectively on-site, will undoubtedly draw more visitors to the proposed glamping site – and on balance this accommodation will enable tourists that may have only visited for the day to spend longer in the area and access more of the activities provided. In the surrounding area there are many more attractions drawing visitors in and offering plenty of options for guests to Hollingworth Ford Glamping to make the most of their time in the area, from equestrian centres, historic houses, golf clubs and museums, to miniature golf and soft play centres for the rainy days.

Surprisingly, there are only 5 visitor accommodation offerings in Littleborough listed on TripAdvisor. This highlights the capacity for the development of more tourist accommodation to boost visitor numbers to the available attractions.

4.3 Walks & Nature

Within reasonable proximity to the proposed location lay many nature sites and walks for those who wish to explore when visiting the region. The proposed location within a Country Park offers an unparalleled level of access to the surrounding landscape from the accommodation itself. The park provides many options to enjoy the outdoors – including water sports as mentioned above, as well as bird watching, fishing, walking, mountain biking, and children's play parks. Blackstone Edge Hiking area is also easily accessible to the proposed site, alongside a plethora of other country walks and footpaths. The location on the Pennine Bridleway allows even greater access for walkers and cyclists to the site and the surrounding area – providing overnight stops for those on longer journeys and a base for those exploring the local area. The natural beauty of the area undoubtedly contributes to the significant visitor numbers previously discussed, and this glamping development will be an excellent opportunity to provide accommodation which further connects visitors to the natural environment.

The proposed site will also provide accommodation for those undertaking Duke of Edinburgh expeditions and courses, encouraging young people to develop the skills and abilities they need to enjoy a range of outdoor pursuits both during their visit and into the future. Themed weekends are hoped to be part of the site's offering – for example yoga weekends, bird watching events, dry stone walling courses and more – again promoting access and enjoyment of the great outdoors to those that visit.

4.4 Food and Drink

Local highlights for food and drink to the area include Riva Italian, The Waterside Restaurant Garden & Cabin, Lake Lounge Bar & Restaurant and Olive & Pickle Deli Café. There are also distilleries nearby – North Point Distillery and Wolfburn Distillery being closest to the proposed site.

It is notable that the food and drinks industry in Littleborough is thriving, with 20 restaurants listed on TripAdvisor within Littleborough alone. As the glamping site features cooking facilities, restaurants nearby are not a necessity, though there is no doubt that any restaurants nearby would likely be used by the visitors if available. Additionally, guests to the site will undoubtedly make use of the many small businesses and local producers in the area, purchasing ingredients to enjoy in the comfort and privacy of their accommodation. This will benefit the food and drinks industry in Littleborough and the surrounding area.



5.0 Visitor Accommodation Analysis

Below is a list of the 5 closest accommodation options to the proposed glamping site as shown on Google Maps.

- **Lake Lounge Rooms**
Website: [Link](#)
Approximate Nightly Cost: £110
- **Hollingworth Lake Guest House**
Website: [Link](#)
Approximate Nightly Cost: £89
- **The Rake Tapas Accommodation**
Website: [Link](#)
Approximate Nightly Cost: £140
- **Fielden Farm Cottages**
Website: [Link](#)
Approximate Nightly Cost: Not Available Online.
- **The Moorcrook Inn**
Website: [Link](#)
Approximate Nightly Cost: £95

It should also be noted that the closest glamping site to this proposal offering pods is Pierthorne Valley Camping, at 4.3 miles away. However, given the huge demand nationwide for glamping and need for accommodation in the area, combined with the fact that the proposed site will provide a very different overall offering, both sites will be able to thrive and could in fact benefit each other through increased visitor numbers and reputation for glamping in the area.

It is clear that local accommodation options tend towards inns, guest houses, and self-catering cottages. There are glamping sites identified in the areas surrounding the proposed development, however there is sufficient demand for both sites to thrive and even benefit each other. Therefore, capacity for this site can be seen. With glamping's popularity growing ever stronger (and the impact of Covid-19 likely to accelerate it further), we can be confident of large glamping demand to justify Hollingworth Fold Glamping.

By comparison to the choices above, the proposed glamping site would be a completely different proposition to the current options and likely attract a new, wider tourist demographic. The site could expect to command upwards of £125 per night per glamping unit, and £25 per night per camping pitch, generating an estimated £150,315 annual profit, while creating an additional £404,712 per annum into the Rochdale Metropolitan Borough economy annually through visitor spend.

The tourist trade in winter months is naturally low in most parts of the UK. Despite this, based on our experience working on over 600 glamping projects and reviewing demand in winter months, there would still be sufficient demand for a glamping site in low season, again due to the additional level of comfort and luxury allowed by the proposed style of units.



6.0 Glamping Popularity

Each year we witness an increase in google searches for glamping (as seen below). This trend matches Glampitect's experience of witnessing increasing demand. Interestingly the trend shows increased demand for both peak and off-peak season & shows no sign of decreasing for the time being.

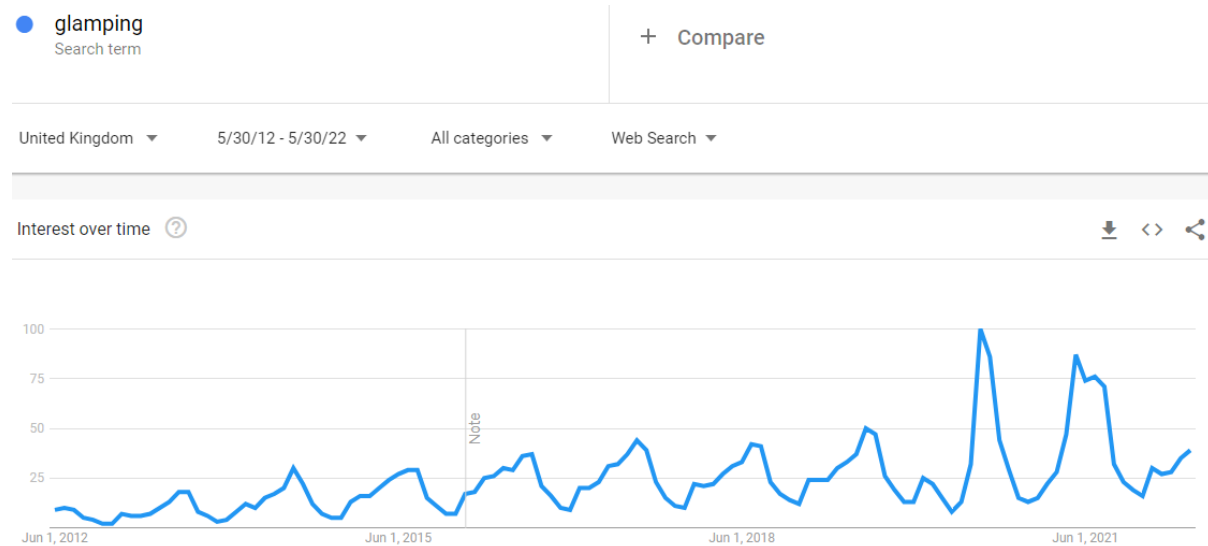


Figure 5 - Glamping Popularity. Source: Google.

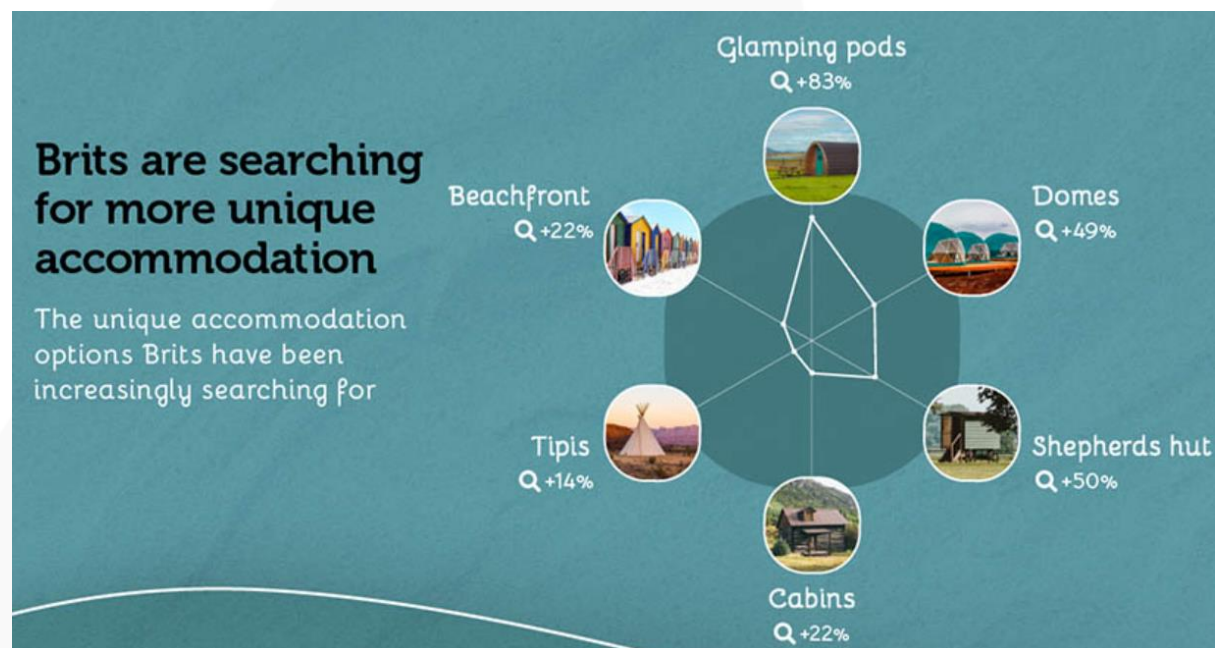


Figure 6 – Staycation Searches 2020-2021. Source: Parkdean Resorts, 2021.

The concept of luxury glamping has been growing massively in popularity in the UK over the past 10 years, with standards and guests' expectations on the rise. Given the popularity of glamping and the need for accommodation in the area, a luxury glamping site would be beneficial. Therefore, we feel the site would provide a positive alternative for visitors to the area and allow the applicants to access a sector of the market that is not yet saturated.

We have seen in other parts of the country that glamping sites are popular even in areas short of tourist attractions, and when close to other glamping options. Furthermore, glamping demands a much higher nightly rate than camping (Cool Camping, 2021), thus attracting a typically higher average spend and consequently boosting the local economy.



Figure 7 – Glamping Price. Source: Cool Camping, 2021.

Glamping has a certain novelty, meaning it is now an attraction in its own right. The location of this site, whilst being close to plenty of other attractions, will certainly appeal to potential visitors – drawing tourists to the area and benefitting the local economy.

7.0 PESTLE Analysis

A PESTLE analysis is a strategic framework used to identify the external environment in which a business operates. It provides an opportunity to recognise and adapt to factors which could influence the business, positively or negatively.

This PESTLE analysis will analyse the external environment of the proposed development in order to identify opportunities, threats, and influential factors which may impact, positively or negatively, upon the likelihood of success for this business.

7.1 Political

7.1.1 Brexit Uncertainty, Covid-19 Impact and Cost of Living Crisis

Historically, uncertain political times have seen UK-based tourists favour 'staycations' over foreign holidays. Ongoing fears over foreign travel due to the Covid-19 Pandemic are also expected to continue to encourage home-based tourism.



Figure 7 – Staycation Statistics. Source: Parkdean Resorts, 2020.

This is reinforced by data from Verdant Leisure who found that one in three holidaymakers are keen to explore UK countryside getaways, with the most popular holiday destinations for domestic vacations being the coast and seaside (Nath.V, 2022 with reference to figures from Verdant Leisure, 2022).

7.2 Economic

7.2.1 Inflation

As inflation rose by 5.4% in 2021 (Thomas, 2022), and sits at 8.8% (Office for National Statistics, 2022), many Britons may face tighter financial situations in the coming year. Whilst this could be a threat to tourism, when compared with figure 7, we can see that as inflation rose, so did the staycation trend. Therefore, it is reasonable to conclude that given continuous inflation, staycations will continue to rise accordingly, demonstrating a need for more visitor accommodation and glamping sites in the UK.

7.2.2 Cost of Living

The rising cost of living will also have an impact on holiday intentions. Recent data from GoCompare shows only 1% of people will chose a more expensive destination this year, with their findings showing many will opt for more staycations than they previously planned (GoCompare, 2022). This is echoed in findings from the OTA, showing 41% of holidaymakers intend to opt for a staycation rather than staying abroad (Mayling, Travelweekly 2022). Given these intentions, it is clear that additional visitor accommodation in the Littleborough area is needed to capitalise.

7.3 Social

7.3.1 Outdoor Recreation

Participation in outdoor recreation has been a significantly growing trend over the last few years as Covid-19 has pushed communities to meet up outdoors and encouraged people to take up new pastimes in the natural environment such as cycling, resulting in the “bike boom” (Muittari, 2021). Running app Strava recorded a significant growth in users since the start of the pandemic (Muittari, 2021). Nature and sporting activities have become higher priorities during the pandemic. Some 27% and 22% of camping and caravanning customers would be encouraged to choose a site that offered nature-spotting tours and stargazing tours, respectively (NEC Group, 2022). 28% of customers are more likely to book a site that offers activities such as adventure sports or fishing (NEC Group, 2022). Glamping as a whole provides a great opportunity to connect this trend with visitor accommodation in your area, giving tourists a real connection to the natural environment in which they are staying. This site in particular will truly offer a unique level of access to outdoor activities and the opportunity to make the most of the surrounding network of public rights of way on foot or by bike, thanks to its exceptional location as highlighted in Section 4.3 of this report.

Further, the applicants intend to offer a discount scheme that rewards guests for arriving by public transport or by sustainable travel methods such as walking or cycling.

7.4 Technological

7.4.1 Renewable Energy

With growing concerns over climate change, the need for and use of renewable energy is more important than ever. This development acknowledges the benefits of renewable energy and hopes to utilise solar power to supplement the energy requirement at the site. In doing so, the applicant has identified a technological factor within the external environment and created an opportunity to better their future glamping business.

7.4.2 High-Tech Holidays

At *Glampitect* we have seen an increased number of applications and glamping guests who are seeking to visit and establish sites which offer a high-tech glamping experience. Noting this, the applicant intends to meet this trend by including TVs in each unit, as well as utilising a booking platform to ensure the guest experience is as seamless as possible from start to finish.

7.5 Legal

7.5.1 Regulations

As is the case with any development or new business, there are many regulations which must be adhered to. In this case, the applicant recognises this and has enlisted the assistance of glamping experts *Glampitect* to ensure that all legalities are met, and the future glamping business abides by all relevant regulations.



7.6 Environmental

7.6.1 Environmental Policies

We recognise the importance of the natural environment in Littleborough and have closely examined the policies that the Rochdale Metropolitan Borough Council considers against planning applications to maintain this landscape amenity. As glamping units require minimal excavation, physical landscape damage is typically very minimal with this kind of development. In addition to this, at *Glampitect* we take great care in the design process to ensure that our projects protect and enhance the environment around them.



8.0 Summary

As identified within this report, the Greater Manchester area experiences large numbers of visitors, the majority of whom are domestic tourists taking advantage of the staycation trend.

The key tourism markets which draw visitors to Littleborough are water sports, historic attractions, walks and nature, and food and drink.

Existing accommodation in the area was examined, and a clear gap in the market for glamping development has been identified. Hollingworth Fold Glamping will fill this gap and increase the available accommodation offering in the area, thereby contributing an estimated £404,000 per annum to the local economy.

Glamping is an indisputably accelerating trend within the UK, and one which is likely to increase with the continuous impact of Covid-19. Demanding a higher nightly rate than traditional camping and most nearby hotels, it will be an excellent way to diversify accommodation offerings within Littleborough and boost the nightly rate in the area.

Finally, having conducted a PESTLE analysis, multiple opportunities have been identified for this development, including Covid-19 and Brexit, inflation as a driver for staycations, the growing trend of outdoor recreation, and renewable energy. Many factors which would typically impact negatively upon a business success will likely impact positively upon this development, making glamping an excellent venture.

It has been demonstrated that the proposed development will boost the local and rural economy and offers a desirable accommodation style for visitors. Therefore, we are confident that Hollingworth Fold Glamping will be beneficial to Littleborough economically, socially, and environmentally.



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