HORSHAM DISTRICT

HOTEL & VISITOR ACCOMMODATION STUDY

Technical Appendices

Prepared for:
Horsham District Council

July 2016

hotel solutions
the hotel development consultancy

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APPENDIX 1

HORSHAM DISTRICT - TOURIST ACCOMMODATION ESTABLISHMENTS

JULY 2016

HOTELS

Hotel	Location	Area	Standard	Rooms
Amberley Castle Hotel	Amberley	Amberley	Luxury Country House	19
Travelodge Billinghurst	Billinghurst	Billinghurst	Budget	26
Tottington Manor Hotel	Edburton	Henfield	n/a	10
Premier Inn Horsham	Horsham	Horsham	Budget	64
Travelodge Horsham Central	Horsham	Horsham	Budget	67
Wimblehurst Hotel	Horsham	Horsham	n/a	14
Springfields Hotel	Horsham	Horsham	n/a	11
South Lodge Hotel	Lower Beeding	Horsham	5 star Country House	89
Cisswood House Hotel	Lower Beeding	Horsham	3 star	51
Ghyll Manor Hotel	Rusper	Horsham	3 star	29
Random Hall	Slinfold	Horsham	Small Country House	14
Cottesmore Golf & Country Club Hotel	Colgate	Horsham	3 star Golf	20
Chequers Hotel	Pulborough	Pulborough	n/a	9
Abingworth Hall	Thakeham	Pulborough	n/a	25
Roundabout Hotel	West Chiltington	Pulborough	3 star	26
The Old Tollgate Restaurant & Hotel	Bramber	Steyning/Bramber	3 star	38

Note:

1. Not all hotels in the District participate in the national hotel grading scheme. We have used our judgement and review of listings for hotels on OTAs (online travel agents such as booking.com and LateRooms) to provide an indication of the standard of hotels

INNS

Inn	Location	Area	Grade	Rooms
The Sportsman Inn	Amberley	Amberley		5
The George Inn Hotel	Henfield	Henfield		10
The Queens Head	Horsham	Horsham		8
The Red Lyon	Slinfold	Horsham		4
The Selsey Arms	Coolham	Horsham		4
The Crown Inn	Dial Post	Partridge Green		2
The Windmill Inn	Littleworth	Partridge Green		5
The Five Bells	West Chiltington	Pulborough		5
The Labouring Man	Pulborough	Pulborough		5
Mucky Duck Inn	Tismans Common	Rudgwick	4 star	11
George & Dragon	Shipley	Shipley		2
The Castle Inn Hotel	Bramber	Steyning/Bramber	3 star	10
The Chequer Inn	Steyning	Steyning/Bramber		3
The Rising Sun	Upper Beeding	Steyning/Bramber		5
White Horse Hotel	Storrington	Storrington		13

GUESTHOUSES AND B&Bs

Establishment	Location	Area	Grade	Rooms
Brook Green B&B	Amberley	Amberley		1
Cherry Tree Cottage B&B	Amberley	Amberley		1
Foxleigh Barn B&B	Amberley	Amberley		2
Stream Cottage	Amberley	Amberley	4 star	1
The Old Bakery	Amberley	Amberley	4 star	1
The Thatched House	Amberley	Amberley	4 star	2
Woodybanks Cottage	Crossgates	Amberley	4 star	2
Five Oaks Farm B&B	Billinghurst	Billinghurst		3
Owlbarn Landing	Billingshurst	Billinghurst		4
Trees	Billinghurst	Billinghurst		4
Brook Hill House B&B	Cowfold	Cowfold		2
Eastlands Farmhouse	Cowfold	Cowfold		1
1 The Laurels	Henfield	Henfield	4 star	4
Caffyns Cottage	Woodmancote	Henfield		2
Eaton Thorne House	Woodmancote	Henfield		4
Henfield Prospect Cottage	Henfield	Henfield		2
Mercers Barn	Wineham	Henfield		2
Timbers	Henfield	Henfield		1
The Hyde Granary	Handcross	Horsham	4 star	2
Alton Guest House	Horsham	Horsham		3
Faygate Place	Faygate	Horsham		4
Glebe End B&B	Warnham	Horsham		4
Goffsland Farm	Shipley	Horsham	4 star	2
Magpies	Slinfold	Horsham		3
Nowhere House B&B	Warnham	Horsham		2
Sillett House	Horsham	Horsham		2

The Larches	Horsham	Horsham		3
The Martin's Bed & Breakfast	Horsham	Horsham		1
The Old Posthouse	Lower Beeding	Horsham		6
The Willows	Faygate	Horsham		2
Village Pantry	Lower Beeding	Horsham		4
Pound Cottage	Partridge Green	Partridge Green	3 star	3
Ashton House	Pulborough	Pulborough		3
Barn House Lodge	Pulborough	Pulborough	4 star	2
Beacon Lodge	Watersfield	Pulborough		2
Glebe Cottage	Pulborough	Pulborough		3
Shorts Farm	Nutbourne	Pulborough		2
The White House B&B	Thakeham	Pulborough		3
Tirol House	Thakeham	Pulborough		2
Field Farm Bed & Breakfast	Rudgwick	Rudgwick		3
Meadow House	Southwater	Southwater		3
Thornhill	Southwater	Southwater		1
Buncton Manor Farm B&B	Wiston	Steyning/Bramber		2
Springwells	Steyning	Steyning/Bramber	3 star	11
Uppingham	Steyning	Steyning/Bramber		3
Downs View B&B	Upper Beeding	Steyning/Bramber		7
Southview Bed and Breakfast	Storrington	Storrington		4
Holt House	Washington	Washington		3
Long Island B&B	Washington	Washington		1

SELF-CATERING ACCOMMODATION

Establishment	Location	Area	Type	Grade	Units	Beds	Letting Agency
Densford Cottage	Amberley	Amberley	Cottage		1	4	Rural Retreats
Garden Cottage	Amberley	Amberley	Cottage		1	4	Amberley House Cottages
Little Barn	Amberley	Amberley	Barn Conversion	5 star	1	2	English Country Cottages
Old Orchard	Amberley	Amberley	Bungalow		1	5	Amberley House Cottages
Painters Old Studio	Amberley	Amberley	Cottage		1	2	Amberley House Cottages
The Old Boat House	Houghton Bridge	Amberley	Barn Conversion		1	4	
The Roost	Amberley	Amberley	Barn Conversion		1	2	
The Artisan Bakehouse	Ashurst	Ashurst	Cottage		2	8	
The Straw House	Ashurst	Ashurst	Barn Conversion		1	6	Amberley House Cottages
Cedar Grange	Billingshurst	Billingshurst	House		1	16	
The Granary	Cowfold	Cowfold	Barn Conversion		1	4	Amberley House Cottages
Grovelands Lodge	Wineham	Henfield	House		1	2	English Country Cottages
Little Timbers	Small Dole	Henfield	Barn Conversion	4 star	1	2	Welcome Cottages
Lychgate Cottage	Henfield	Henfield	Bungalow		1	2	
Oak/Ash/Fir Cottages	Henfield	Henfield	Bungalow		3	16	Interhome AG
Old Tudor Annex	Henfield	Henfield	Cottage		1	2	Sykes Cottages
River Cottage	Henfield	Henfield	Barn Conversion		1	4	Amberley House Cottages
Rushfields Barn	Henfield	Henfield	Barn Conversion		1	4	Cottages.com
The Whistle Stop	Henfield	Henfield	Barn Conversion	Boutique	1	2	
Woodhouse Holiday Cottages	Henfield	Henfield	Cottages		3	16	
Apple Tree Annexe	Slinfold	Horsham	Cottage		1	2	
Barns Green Cottage	Barns Green	Horsham	Cottage		1	3	
Birchwood Apartment	Southwater	Horsham	Apartment		1	3	
Carylls Country House	Faygate	Horsham	Svcd Apts		18	36	
Church Farm Cabin	Horsham	Horsham	Cabin		1	3	
Fairlee Cottage	Rudgwick	Horsham	Barn Conversion	4 star	1	3	Cottages.com
Garden Flat	Slinfold	Horsham	Flat		1	4	
Gatwick Country Lettings	Horsham	Horsham	Svcd Apts		5	14	
Ghyll Cottage	Rusper	Horsham	Cottage		1	4	
Horsham Serviced Apartments	Horsham	Horsham	Svcd Apts		3	8	Short Lets UK
Huckles Cottage	Slinfold	Horsham	Cottage		1	2	Amberley House Cottages

Market Square	Horsham	Horsham	Cottage		1	2	Mulberry Cottages
Newells Farm	Lower Beeding	Horsham	Barn Conversion	3/4 star	3	20	
Roosthole	Mannings Heath	Horsham	House		1	8	Mulberry Cottages
Sumners Ponds	Barns Green	Horsham	Fishing Lodges		2	10	
The Bothy	Lower Beeding	Horsham	House		1	10	Amberley House Cottages
The Hayloft	West Grinstead	Horsham	Cottage		1	2	
The Lodge	Horsham	Horsham	Cottage	4 star	1	4	Mulberry Cottages
The Tower Warnham Court	Warnham	Horsham	House		1	4	
Walnut Barn/ Walnut Cottage	Horsham	Horsham	Barn Conversion	5 star	2	12	Sussex Holiday Cottages
Woodside Farm House	Colgate	Horsham	House		1	4	English Country Cottages
Cottesmore Lodges	Colgate	Horsham	Lodges	4 star	7	28	
Rose Tower	Warnham	Horsham	Cottage		1	5	
Little Lock Cottage	Partridge Green	Partridge Green	Cottage	4 star	1	2	Amberley House Cottages
Withyfield Cottage	Partridge Green	Partridge Green	Eco Lodge		1	6	
Celebration Cottage	Watersfield	Pulborough	Cottage	4 star	1	8	Amberley House Cottages
Chalet	Wiggonholt	Pulborough	Chalet		1	7	
Cottage	Pulborough	Pulborough	Cottage		1	6	
Cranmer Cottage	Storrington	Pulborough	Cottage		1	3	
East End at Hurston Warren	Wiggonholt	Pulborough	House		1	3	Amberley House Cottages
Echo House	Pulborough	Pulborough	House	4 star	1	6	Amberley House Cottages
Greenacres Farm	Storrington	Pulborough	Barn Conversion		4	8	
Greenhurst Cottage	Storrington	Pulborough	Cottage		1	4	
House on the Brooks	Hardham	Pulborough	House	5 star	1	12	
Ivy Cottage	Pulborough	Pulborough	Cottage	4 star	1	6	Amberley House Cottages
Laybrook Farmhouse	Thakeham	Pulborough	Cottage	4 star	2	4	Welcome Cottages
Library Cottage	Pulborough	Pulborough	Cottage	3 star	1	2	Amberley House Cottages
Lower Jordans	Nutbourne	Pulborough	Cottage		1	5	Amberley House Cottages
Mill House	Pulborough	Pulborough	House		1	12	
Stable Cottage	Hardham	Pulborough	Barn Conversion	3 star	1	2	Amberley House Cottages
The Clearing	Storrington	Pulborough	Cottage		1	2	Amberley House Cottages
The Lodge	Goose Green	Pulborough	Cottage	5 star	1	4	English Country Cottages
Whistlers	Rackham	Pulborough	Barn Conversion		1	4	English Country Cottages
Woodshill Byres	West Chiltington	Pulborough	Barn Conversion	4 star	3	8	
Yew Tree Granary	Hardham	Pulborough	Barn Conversion		1	2	Amberley House Cottages

Little Birches	West Chiltington	Pulborough	Apartment		1	2	Amberley House Cottages
Shelley's Retreat & Annexe	Rudgwick	Rudgwick	Barn Conversion		2	4	English Country Cottages
Stable Barn	Shipley	Shipley	Barn Conversion		1	2	English Country Cottages
Lazy Daze	Southwater	Southwater	House		1	8	
The Long Barn	Upper Beeding	Steyning/Bramber	Barn Conversion		1	4	Bramley and Teal
Buncton Manor Cottage	Wiston	Steyning/Bramber	Cottage	3 star	1	2	Amberley House Cottages
Charlton Mews	Steyning	Steyning/Bramber	Cottage		1	8	Cottages.com
Fantasy Cottage	Steyning	Steyning/Bramber	Barn Conversion		1	2	Amberley House Cottages
Holly Cottage	Steyning	Steyning/Bramber	Barn Conversion		1	4	English Country Cottages
Mill Cottage	Steyning	Steyning/Bramber	Cottage		1	2	Amberley House Cottages
Pepperscombe Cottages	Steyning	Steyning/Bramber	Barn Conversion		2	4	
Rosebud Cottage	Steyning	Steyning/Bramber	Cottage		1	3	
Saxon Cottage	Steyning	Steyning/Bramber	Cottage		1	3	National Trust Cottages
Spithandle Nursery Barn	Wiston	Steyning/Bramber	Barn Conversion		2	8	English Country Cottages
The Granary	Steyning	Steyning/Bramber	Barn Conversion		1	6	
Windsor Cottage	Steyning	Steyning/Bramber	Cottage		1	4	English Country Cottages
Wiston Granary	Wiston	Steyning/Bramber	Cottage		1	2	
Old Farm Kitchen	Ashington	Storrington	House		1	2	Cottages.com
Bay Tree Cottage	Storrington	Storrington	Cottage	4 star	1	2	Amberley House Cottages
Byre Cottages	Storrington	Storrington	Barn Conversion	3/4 star	5	20	
Spring Cottage	Storrington	Storrington	Cottage		1	6	
The Granary XII	Thakeham	Storrington	Cottage		1	2	
The Old Stables	Thakeham	Storrington	Barn Conversion		1	4	Henry Adams Property Lets
The FOG	Washington	Washington	Studio		1	2	
The Hay Barn	Washington	Washington	Barn Conversion	4 star	1	4	Amberley House Cottages
Washington Corner Cottage	Washington	Washington	Cottage		1	2	Holidaycottages.co.uk

TOURING CARAVAN & CAMPING SITES

Site	Location	Area	Season	Grade	Caravan Pitches	Tent pitches	Statics Caravans	Other Units
The Limeburners Camping	Newbridge	Billinghurst	All year		42			
Honeybridge Park	Dial Post	Dial Post	All year	4 star	150		90	
Blacklands Farm Campsite	Henfield	Henfield	All year		75			
Downsview Park	Woodmancote	Henfield	All year				48	
Farmhouse Caravans and Camping	Small Dole	Henfield	March-Nov		30			
Southdown Caravan Pak	Small Dole	Henfield	April-Oct	3 star	10			
Larkins Park	Brook Green	Horsham	All year		28			
Slinfold Caravan Club Site	Slinfold	Horsham	March - Oct		39			
Sumners Ponds	Barns Green	Horsham	All year	4 star	90			7
Top Paddock Campsite	Horsham	Horsham	Seasonal			10		
Luckista Grove	Pulborough	Pulborough	11 months				21	
Riverside Farm	Rudgwick	Rudgwick	All year	CS[1]	5	10		
Gofflands Farm	Shipley	Shipley	All year	CL[2]	5			
Raylands Country Park	Southwater	Southwater	Feb-Dec	3 star			96	
Fairoaks Farm	Wiston	Steyning/Bramber	May-Sept			25		
Gatewick Farm	Steyning	Steyning/Bramber	All year	CL[2]	5			
Buncton Manor Farm	Wiston	Steyning/Bramber	April-Oct	CS[2]	5			
Truleigh Hill Youth Hostel	Truleigh Hill	Steyning/Bramber	March-Oct			10		2
White House Caravan Site	Steyning	Steyning/Bramber	March-Nov		9			
Chancton House	Washington	Washington	March - Oct	CL[2]	5			
Washington Caravan & Camping Park	Washington	Washington	All year	4 star	21	80		

Notes:

1. CS = Certificated Site – certificated by the Camping and Caravanning Club for 5 caravan pitches and 10 tent pitches
2. CL = Certificated Location – certificated by the Caravan Club for 5 caravan pitches for Caravan Club members only

GLAMPING SITES

Establishment	Location	Area	Type	Units	Bedspaces
Shadow Woods	Billinghurst	Billinghurst	1950s bus/ Converted truck	2	4
Knepp Wildlife Safaris	Dial Post	Dial Post	Shepherd's Huts/Bell tents/Yurts/Tipi	9	18
Eastlands Farm	Cowfold	Cowfold	Shepherd's Hut	1	2
Sumners Ponds	Barns Green	Horsham	Safari tent/ Camping pods	6	24
The Hut in the Orchard, Conies Farm	Maplehurst	Horsham	Shepherd's Hut	1	2
Withywood Sheperd's Hut	Partridge Green	Partridge Green	Shepherd's Hut	1	4
Shepherd's Hut (airbnb listing)	Bines Green	Partridge Green	Shepherd's Hut	1	3
Bell Tent (aibnb listing)	Pulborough	Pulborough	Bell Tent	1	4
Canfields Farm (Feather Down Farm)	Rudgwick	Rudgwick	Feather Down Farm tents	7	46
Truleigh Hill Youth Hostel	Truleigh Hill	Steyning/Bramber	Bell Tents	2	8

GROUP & YOUTH ACCOMMODATION

Estab	Location	Area	Type	Grade	Bedspaces
Gaveston Hall	Nuthurst	Horsham	Residential Education Centre		100
Timber Bunk Barn	Hardham	Pulborough	Bunk Barn		10
Lodge Hill Centre	Watersfield	Pulborough	Outdoor Education Centre		79
Chichester College Brinsbury Campus	North Heath	Pulborough	Campus Accommodation		29
YHA Truleigh Hill	Truleigh Hill	Steyning/Bramber	Youth Hostel	2 star Hostel	56

RESIDENTIAL CONFERENCE CENTRES

Venue	Location	Area	Bedrooms
Roffey Park	Horsham	Horsham	60
Wilton Park/ Wiston House	Steyning	Steyning	48

WEDDING VENUES WITH ACCOMMODATION

Venue	Location	Area	Bedrooms
Barnfield Barn	Mannings Heath	Horsham	7

APPENDIX 2

GLOSSARY OF DEFINITIONS – TOURIST ACCOMMODATION

Types of Hotel

Budget

Branded limited service hotels with clean and comfortable standardised en-suite bedrooms with TV and tea and coffee making facilities and paid for Wi-Fi but otherwise limited in-room provision or services such as guest toiletries or room service. Will locate in a wide range of locations from major cities to smaller towns, seaside resorts and airport locations. Size will vary significantly by location. Tend to be larger hotels (100-200 bedrooms) in major cities and smaller hotels (50-60 bedrooms) in provincial town locations.
Key budget hotel brands in the UK are Travelodge, Premier Inn, Ibis, Days Inn
Economy budget brands (with a more basic bedroom product) include Ibis Budget, Campanile and Metro Inns

3 Star

A full service hotel that offers a restaurant and bar also open to the public, usually function/conference/banqueting facilities, and often leisure. Branded offers would tend to be 120-150 rooms+, but independent hotels may be smaller in size. Will locate in city centres and out of town where there are significant drivers of demand such as business parks.
Brand examples include Holiday Inn, Ramada, Village Urban Resort, Jury's Inn, Park Inn

4 Star

A full service hotel but with a higher specification and larger bedrooms than 3 star hotels, usually offering bath and shower, telephone, internet connection, and a wider range of services including full room service and porterage, and 24 hour reception. A quality restaurant, bar, a range of meeting rooms and business services, and a health and fitness centre. These tend to be large hotels, over 150 rooms, and sometimes up to 250 rooms+. Major city centres are the preferred locations.
Brand examples include Marriott, Crowne Plaza, Hilton, Radisson Blu, Novotel, Doubletree by Hilton, Copthorne, Millennium, Pullman, Macdonald

Boutique

Relatively small (30-50 rooms), high quality, individual hotels that feature contemporary design and a good food offer. They are often independent hotels or part of small chains that bear the signature of their founder. However, national brands are beginning to emerge that are larger format units (100+ rooms) and compete with 3 and 4 star hotels but achieve a premium on their rate due to their style and service.

Brand examples include Malmaison, Hotel du Vin, Abode, Bespoke, Chapter, Hotel Indigo

Country House Hotels

A quality hotel, often a building of character, set in extensive grounds in a rural setting. Most are luxuriously appointed and the rooms frequently have special features often targeted at the leisure rather than the business guest. Some may have health and fitness facilities, swimming pools and spas and may be able to offer or arrange country sport activities such as clay pigeon shooting and fishing. The atmosphere of a country house hotel should be one of relaxation, comfort and style.

Golf Hotels and Resorts

Hotels attached to or developed with a golf course that can range considerably in their standard and the facilities on offer. Usually they would be at least 3 star in standard, and can be developed to 4 star and luxury standards, especially if in association with a championship course. As with country house hotels and other destination hotel offers that are more remotely located, most would usually offer, restaurants, bars, function/banqueting rooms, full leisure centres, often spas, and may also have other specialist facilities such as golf academies. Some also have shared ownership lodges in their grounds.

Brand Examples include De Vere Hotels, MacDonald Resorts, Marriott Hotels & Country Clubs.

Luxury Family Hotels

Luxury country house hotels that focus primarily on catering for the family breaks market. Luxury Family Hotels is the only national hotel company trading in this market. A number of luxury country house hotels also actively target the family market.

Adult Only Hotels

Country house hotels that cater exclusively for adults on short breaks. Warner Leisure Hotels is the only national company offering this type of hotel. Their hotels offer a wide range of sports and leisure facilities and activities as well as evening entertainment programmes.

Spa Hotels

Hotels with extensive spa and wellness facilities that focus on the spa break market.

Hotel Performance Terminology

Room Occupancy

The percentage of all rooms sold as a proportion of total rooms available in that period.

Achieved Room Rate (ARR)

The net average amount of rooms revenue that hotels achieve per night per room let after deduction of VAT, breakfast (if included), discounts and commission charges. Hotel rooms revenue divided by the number of rooms sold.

Revpar

Revenue per available room. The net average amount of rooms revenue that hotels achieve per night per available room after deduction of VAT, breakfast (if included), discounts and commission charges

Other Types of Accommodation

Inn

Bed and breakfast accommodation within a traditional inn or pub.

Boutique Inn

Inns that feature contemporary interior design, furnishings and fittings in guest bedrooms and public areas.

Restaurant with Rooms

Guest bedrooms provided above or alongside a restaurant operation. The restaurant is normally the most significant element of the business and is usually open to non-residents as well as staying guests. Breakfast is normally provided.

Guest House

A guest house normally has at least 4 letting bedrooms with en-suite or private bathroom facilities. It is usually run as a commercial business and will have been granted planning permission as such. Breakfast is usually provided and evening meals may also be offered.

B&B

Accommodation offering bed and breakfast, usually in a private house. B&Bs normally accommodate no more than 6 guests and may or may not serve an evening meal. Will not usually require planning permission unless the primary use of a property.

Boutique B&B

Luxury bed and breakfast accommodation that features contemporary, chic interior design, furnishings and fittings.

Farmhouse B&B

Bed and breakfast accommodation provided on a working farm.

Homestay

Where householders let out rooms in their home to tourists or language school and exchange programme students. This type of accommodation has been significantly boosted by the airbnb website and other similar websites such as Wimdu and One Fine Stay.

Holiday Cottage

Cottages, houses and converted barns that are let out for self-catering holidays and short breaks and other short stay purposes. They can be residential properties that are let by owners or through holiday cottage letting agencies or purpose-designed barn conversions that have been given planning permission for holiday use.

Boutique Self Catering

Luxury self-catering accommodation that features contemporary interior design

Super Cottages

Large self-catering properties that can accommodate parties of up to 20-30 guests. These can be large residential properties, e.g. manor houses that are let out as self-catering accommodation or large purpose-designed self-catering barn conversions. Such properties have developed to cater for the growing demand for family and friendship get togethers, celebrations and house parties. They generally trade at the top end of the market, offering high quality, luxury accommodation. They will include large living spaces and dining areas and usually feature the latest in home entertainment systems. Some also have leisure facilities in terms of swimming pools, games rooms and snooker rooms.

Access Exceptional Self Catering Cottages

Self-catering accommodation that is fully adapted for use by independent and assisted wheelchair users, usually including the following features:

- Wide doorways and corridors;
- Extra space for wheelchair users;
- Wheel-in showers, possibly with hoist rails;
- Bathrooms and toilets adapted for wheelchair users;
- Low-level kitchen counters;
- Ramps, lifts or stair lifts if needed.

Holiday Lodges

Timber lodges and log cabins that are let out for self-catering holidays and short breaks or used as second homes by their owners.

Holiday Lodge Parks

Complexes of timber holiday lodges for outright or timeshare purchase and/or rental. They have developed primarily in inland locations, often woodland or waterside settings and/or associated with other developments and activities such as marinas, golf courses (golf lodges), fishing lakes (fishing lodges), watersports or alongside hotels. Most holiday lodge parks are small – the average holiday lodge park covers 32.2 acres and has 35 lodges. Timber holiday lodges are generally seen as a more up-market and exclusive alternative to the traditional caravan holiday home: they are particularly popular with older and more affluent customers. Most holiday lodges have two or three bedrooms. Holiday lodge parks increasingly have a number of on-site leisure facilities, including restaurants, bars, swimming pools, gyms and children's play areas. Holiday lodges are generally purchased as second homes for holiday purposes. Most park operators offer a holiday rental service to owners and many make participation in such a service a condition of purchasing a lodge.

Fishing Lodges

Holiday lodges around fishing lakes, usually for rental.

Golf Lodges

Holiday lodges on golf courses for outright or timeshare purchase or rental.

Eco Lodges/ Eco Lodge Parks

Individual timber lodges or complexes of lodges that are built to the highest possible environmental sustainability standards and designed and operated to minimise their carbon footprint. Eco lodges will typically include features such as the use of sustainable materials in their construction, grass or sedum roofs, renewable energy sources, waste recycling, energy conservation measures and water conservation systems. Their green credentials are a key part of their marketing and many customers are increasingly choosing these types of accommodation because they want to go an eco-friendly holiday and reduce their carbon footprint. Eco lodge operators will usually also encourage their guests to take part in green activities in terms of car-free days out, walking and cycling, nature study, foraging, bird and wildlife watching, and buying local produce.

Treehouses

Luxury wooden treehouses that are rented out for self-catering holidays and short breaks

Touring Caravan & Camping Sites

Sites that offer pitches for touring caravans, motor homes and tents. They can range in size from small, independently operated sites with minimal facilities and mainly grass pitches to extensive sites with central facilities and mostly hard standing pitches with electric hook up. National operators are the Caravan Club and Camping and Caravanning Club, which offer club sites across the country for their members, which in many cases are also open to non-members.

Certificated Sites

Small touring caravan and camping pitches that are certificated to operate by the Caravan Club and Camping & Caravanning Club, without the need for planning permission. Caravan Club certificated sites are for 5 touring caravan or motor home pitches. Camping & Caravanning Club certificated sites are usually for 5 touring caravan pitches and up to 10 tent pitches.

Eco Camping/ Wild Camping

Camping on small, basic, off-grid sites - usually grassed or forest sites with minimal facilities, often in isolated locations.

Camping Pods

Camping pods are insulated wooden tents with double glazed windows and French doors, heaters, electricity and sometimes outside decking areas. They range from standard pods sleeping two people to family, super or mega pods sleeping 4 people.

Glamping

Glamping (glamorous camping) involves camping in ready-erected, fully-equipped tents, yurts, tipis and other unusual forms of camping and caravanning accommodation such as geodesic domes, gypsy caravans, retro caravans, safari tents, glamping pods and tree camping. These types of accommodation have proved to be highly popular with more affluent families that want to experience camping holidays but without the hassle of having to bring their own tents and camping equipment.

Youth Hostels

Simple accommodation in private, shared or dormitory rooms with double, single and bunk beds. Most hostels will have a self-catering kitchen. Some also provide meals. More modern hostels may have en-suite family rooms.

Bunkhouses

Basic self-catering accommodation provided in converted barns. Bedrooms are mainly dormitory-style with bunk beds, but can also include private family rooms. Bunkhouse usually include shared toilets and showers and small kitchens.

Camping Barns

Sometimes known as 'stone tents', Camping Barns vary in facilities ranging from a basic roof over your head to the more luxurious, which include a shower and cooking facilities. Sleeping areas tend to be communal. Typically found on working farms.

APPENDIX 3

HOTELS & LARGE ACCOMMODATION BUSINESSES INTERVIEWED

Hotel / Accommodation Business	Face-to-Face/ Telephone/ Head Office Data
Amberley Castle	F
South Lodge	F
Ghyll Manor	T
Cottesmore Golf & Country Club	F
Roundabout Hotel	F
Premier Inn Horsham	F/HO
Travelodge Horsham	HO
Travelodge Billingshurst	T
Wimblehurst Hotel, Horsham	T
Springfields Hotel, Horsham	T
Chequers Hotel, Pulborough	T
Gatwick Country Lettings	T
Short Lets UK	T
Carylls Country House	T
Mulberry Cottages	T
Hoseasons Property Recruitment	T
Amberley House Cottages	T
Sumners Ponds	F
Washington Caravan & Camping Park	F
Honeybridge Park	F
Fairoaks Farm Campsite	T
The Limeburners	T
Blacklands Farm Campsite, Henfield	T
Larkins Park, Brook Green	T
Downsview Park	F
Raylands Country Park/ Roundstone Caravans	T
Knepp Wildlife Safaris	T
Canfields Farm	T
Lodge Hill Centre	T
Gaveston Hall	Y
YHA Truleigh Hill (interviewed in 2014 for the South Downs Tourist Accommodation Review)	T
Wilton Park/ Wiston House	T
Roffey Park	T

APPENDIX 4

SURVEY OF HORSHAM COMPANIES – COMPANIES INTERVIEWED

A J Walter Aviation
Ceres Power Limited
Cmed Group Limited
RSPCA
The Creative Assembly (Corporate Traveller)
Trend Control Systems
Sony DADC
Action Medical Research
Roffey Park
Sumners Place Auctions

APPENDIX 5

SURVEY OF SMALL ACCOMMODATION BUSINESSES

SURVEY RESULTS

1. Purpose of the Survey

The purpose of the survey of owners of small accommodation businesses was to provide an insight into the current strength of demand and markets for different types of small visitor accommodation business in Horsham District; evidence of times when there may be shortages of such accommodation (because existing accommodation businesses are fully booked), and an understanding of the aspirations of the current owners of small visitor accommodation establishments to expand, develop and upgrade their premises.

2. Methodology and Sample

The survey was undertaken through a CATI (computer assisted telephone interview) survey of a random sample of 50 B&Bs and guest houses, inns and pub accommodation businesses, and small self-catering establishments. The survey sample was broken down by type of visitor accommodation business as follows:

TABLE 1: SURVEY SAMPLE

Type of Accommodation Business	Number of Completed Interviews
B&Bs and Guest Houses	25
Inns	10
Self-Catering	15
Total Interviews	**50**

3. Length of Time Accommodation Businesses Have Been Established

The survey shows some growth in B&B, pub accommodation and self-catering provision in the District with a few respondents having only started trading in the last 3 years.

TABLE 2: LENGTH OF TIME ACCOMMODATION BUSINESSES HAVE BEEN ESTABLISHED

Type of Accommodation Business	% of Accommodation Businesses Interviewed	
	Operating for Under 3 Years	Operating for More Than 3 Years
B&Bs and Guest Houses (Base: 25)	16	84
Inns/ Pub Accommodation (Base:10)	20	80
Self-Catering (Base: 15)	13	87

4. Seasonal Operation of Accommodation Businesses

The majority of accommodation businesses that were interviewed are open all year. Only two of the B&Bs and one of the self-catering businesses that were interviewed operate on a seasonal basis. None of these three businesses have plans to increase their operating season in the future.

TABLE 3: SEASONAL OPERATION OF ACCOMMODATION BUSINESSES

Type of Accommodation Business	% of Accommodation Businesses Interviewed	
	Operating on a Seasonal Basis	Open All Year
B&Bs and Guest Houses (Base: 24)	8	92
Inns/ Pub Accommodation (Base:10)	0	100
Self-Catering (Base: 15)	7	93

5. Recent and Planned Investment

5.1. Expansion in the Last 3 Years

Two of the B&Bs, one pub accommodation establishment and three of the self-catering businesses interviewed have expanded in the last 3 years.

TABLE 4: ACCOMMODATION BUSINESS EXPANSION IN THE LAST 3 YEARS

Type of Accommodation Business	% of Accommodation Businesses Interviewed	
	Expanded in the Last 3 Years	Not Expanded in the Last 3 Years
B&Bs and Guest Houses (Base: 25)	8	92
Inns/ Pub Accommodation (Base:10)	10	90
Self-Catering (Base: 15)	20	80

5.2. Planned Investment in the Next 3 Years

Almost a quarter (11) of the accommodation businesses that were interviewed have plans for investment in the next 3 years. The types of investment include:

- Bedroom refurbishment by B&Bs and pub accommodation establishments;
- The opening of an additional guest bedroom by one B&B;
- The development of additional self-catering units – over half of the self-catering businesses interviewed indicated plans to add further units;
- The development of a wedding barn.

TABLE 5: ACCOMMODATION BUSINESS INVESTMENT PLANS IN THE NEXT 3 YEARS

Type of Accommodation Business	% of Accommodation Businesses Interviewed	
	Investment Planned in the Next 3 Years	No Investment Planned in the Next 3 Years
B&Bs and Guest Houses (Base: 25)	8	92
Inns/ Pub Accommodation (Base:10)	10	90
Self-Catering (Base: 15)	53	47

5.3. Barriers to Investment

Securing finance was identified as the most significant barrier to progressing investment projects for those accommodation businesses that are contemplating future expansion, improvement and development plans. Securing planning permission was also identified as an issue by two self-catering operators, one of which reported that they had been refused permission for additional units

TABLE 6: BARRIERS TO EXPANSION, DEVELOPMENT AND UPGRADING PLANS

Type of Accommodation Business	% of Accommodation Businesses Planning Investment Citing This Barrier		
	Getting Planning Permission	Financing the Project	No Barrier
B&Bs and Guest Houses (Base:2)		50	50
Inns/Pub Accommodation (Base:1)		100	
Self-Catering (Base: 8)	25	38	38

6. Occupancy Levels, Trends and Future Prospects

6.1. 2015 Occupancy Levels

Occupancy performance for small tourist accommodation businesses in Horsham District is relatively strong overall, although there are some poorer performing establishments.

B&B and guest house performance is reasonably strong, with over 60% of respondents reporting average annual room occupancies of over 50% in 2015 and a fifth trading at over 70%. Some B&B and guest house owners reported much lower occupancies, but this is not necessarily an indication of a lack of demand for this type of accommodation in the District. B&Bs and guest houses are very much lifestyle businesses and owners will often limit the amount of business they take according to the lifestyle they wish to pursue or their life stage or personal circumstances.

Inns and pub accommodation businesses in the District are generally trading well, with 70% of respondents reporting annual room occupancies of over 50% in 2015. A few pub accommodation establishments traded at much lower levels of occupancy. We suspect that this could be to do with the quality of accommodation that they are offering and the effort that pub landlords and tenants put into marketing. The provision of accommodation is sometimes very much a secondary element to a pub business.

Self-catering business performance is generally strong, with 87% of self-catering respondents reporting an average annual unit occupancy of more than 50% and 40% recording a unit occupancy of over 70%.

TABLE 7: OCCUPANCY LEVELS 2015

Type of Accommodation Business	% of Accommodation Businesses Interviewed Reporting This Occupancy Level					
	Above 70%	61-70%	51-60%	41-50%	31-40%	Under 30%
B&Bs and Guest Houses (Base: 25)	20	20	24	8	12	16
Inns/ Pub Accommodation (Base: 10)	20	10	40	10	20	0
Self-Catering (Base: 15)	40	27	20	7	7	

6.2. Occupancy Trends 2013-2015

The survey findings show a generally stable accommodation market in the District over the last 3 years. There appears to have been an overall improvement in occupancy performance, with a greater number of operators reporting an increase, rather than a decrease in occupancy. However, many establishments reported no change. This is a common picture across all three types of accommodation.

TABLE 8: OCCUPANCY TRENDS 2013-2015

Type of Accommodation Business	% of Accommodation Businesses Interviewed Reporting a Change in Occupancy in the Last 3 Years			
	An Increase	No Change	A Decrease	Don't Know
B&Bs and Guest Houses (Base: 25)	32	40	24	4
Inns/ Pub Accommodation (Base:10)	40	40	10	10
Self-Catering (Base: 15)	33	40	20	7

Reasons given for improvements in occupancy were as follows:

- Occupancies are still building following recent opening;
- Good customer reviews on Tripadvisor;
- Repeat business and recommendations;
- Increased advertising and marketing;
- A stronger online presence;
- A reduction in B&B supply, resulting in less competition;
- A growth in demand from walkers on the South Downs Way;
- An increase in contractor business as a result of more building work in the area;
- A growth in demand from people visiting friends and relatives.

Reasons cited for a fall in occupancy were as follows:

- Winding down the business in the run up to retirement or due to ill health or other personal circumstances;
- Increased competition, particularly from budget hotels;
- Reduced advertising.

A number of B&B owners indicated that they are happy with the business that they attract and have no ambition to become busier. Some do not advertise their business for this reason.

6.3. Future Prospects 2016-2019

The survey findings suggest a relatively stable accommodation market going forward, with the operators of small accommodation businesses generally expecting the business levels to remain the same or increase. A number of B&B owners are in the process of winding their business down in the run up to retirement and closure. This was the main reason for projected decreases in B&B/ guest house occupancy. One pub accommodation business has been acquired by property developers and will close later in 2016 for redevelopment into houses.

TABLE 9: OCCUPANCY PROSPECTS 2016 -2019

Type of Accommodation Business	% of Accommodation Businesses Interviewed Expecting a Change in Occupancy in the Next 3 Years			
	An Increase	No Change	A Decrease	Don't Know
B&Bs and Guest Houses (Base: 25)	16	44	28	12
Inns/ Pub Accommodation (Base:10)	30	50	10	10
Self-Catering (Base: 15)	33	53	7	7

7. The Extent to Which Accommodation Businesses Trade at Full Capacity

The survey findings show clear evidence of fairly frequent shortages of all three types of small tourist accommodation at weekends (Friday and Saturday nights) between April and October, and during the week in the peak summer months of June, July, August and September. They also show occasional shortages in the winter, both during the week and at weekends.

TABLE 10: WEEKEND (FRIDAY/SATURDAY) OCCUPANCY APRIL - OCTOBER 2015

Type of Accommodation Business	% of Accommodation Businesses Interviewed Trading at Full Capacity				
	Every Weekend	Most Weekends	Some Weekends	Not Many weekends	No Weekends
B&Bs and Guest Houses (Base: 25)	20	28	40	12	0
Inns/ Pub Accommodation (Base: 10)	30	10	60	0	0
Self-Catering (Base: 15)	13	60	20	0	7

TABLE 11: MIDWEEK OCCUPANCY JUNE-SEPTEMBER 2015

Type of Accommodation Business	% of Accommodation Businesses Interviewed Trading at Full Capacity				
	Most of the Time	Quite Often	Occasionally	Not Very Often	Not At All
B&Bs and Guest Houses (Base: 15)	28	44	12	12	4
Inns/ Pub Accommodation (Base: 6)	40	40	20	0	0
Self-Catering (Base: 7)	60	33	0	7	0

TABLE 12: WEEKEND (FRIDAY/SATURDAY) OCCUPANCY NOVEMBER - MARCH 2015

Type of Accommodation Business	% of Accommodation Businesses Interviewed Trading at Full Capacity				
	Every Weekend	Most Weekends	Some Weekends	Not Many weekends	No Weekends
B&Bs and Guest Houses (Base: 15)	4	16	32	40	8
Inns/ Pub Accommodation (Base: 6)	0	10	50	30	10
Self-Catering (Base: 7)	0	0	60	40	0

TABLE 13: MIDWEEK OCCUPANCY NOVEMBER -MARCH 2015

Type of Accommodation Business	% of Accommodation Businesses Interviewed Trading at Full Capacity				
	Most of the Time	Quite Often	Occasionally	Not Very Often	Not At All
B&Bs and Guest Houses (Base: 15)	8	16	24	44	8
Inns/ Pub Accommodation (Base: 6)	0	0	60	40	0
Self-Catering (Base: 7)	7	0	40	47	7

8. Key Markets and Their Future Growth Potential

8.1. Key Markets for Horsham District Tourist Accommodation Businesses

Tables 14-17 overleaf provide a breakdown of the importance of different visitor markets for each type of accommodation. Key conclusions from these tables are as follows:

- The main markets for B&Bs, guest houses and inns are people attending weddings and family parties at weekends, and business visitors and contractors/workmen during the week.
- People coming for short breaks are also an important market for these types of accommodation.
- Walkers on the South Downs Way are a significant source of business for B&Bs, guest houses and inns along its route.
- Less important markets are people coming for a longer holiday, overseas tourists, and people stopping off en-route to the South Coast or West Country, or flying off on holiday from Gatwick.
- People staying for short breaks and longer holidays are the main markets for self-catering establishments.
- People attending weddings and family parties and overseas tourists are also important markets for self-catering properties.
- Self-catering businesses along the South Downs Way attract demand from walkers.
- Business visitors are a key market for some self-catering properties.

TABLE 14: KEY MARKETS FOR B&BS AND GUEST HOUSES (Base: 25)

Visitor Market	% of Accommodation Businesses Interviewed Indicating This Rating			
	Very Important	Quite Important	Slightly Important	Not At All Important
People coming to stay for a short break	32	48	20	0
People coming for a longer holiday (1 week +)	20	8	24	48
People stopping off en-route to the South Coast/West Country	12	32	20	36
People flying off from Gatwick	12	28	16	44
Overseas tourists	16	48	24	12
Walkers on the South Downs Way	24	24	12	40
Shooting parties	0	8	4	88
People attending weddings and family parties	52	40	8	0
Business visitors	48	32	16	4
Contractors and workmen	24	44	16	16

TABLE 15: KEY MARKETS FOR INNS & PUB ACCOMMODATION (Base: 10)

Visitor Market	% of Accommodation Businesses Interviewed Indicating This Rating			
	Very Important	Quite Important	Slightly Important	Not At All Important
People coming to stay for a short break	20	40	40	0
People coming for a longer holiday (1 week +)	10	20	20	50
People stopping off en-route to the South Coast/West Country	10	40	10	40
People flying off from Gatwick	10	20	20	40
Overseas tourists	20	20	50	10
Walkers on the South Downs Way	50	0	30	20
Shooting parties	10	20	30	40
People attending weddings and family parties	60	30	10	0
Business visitors	50	30	20	0
Contractors and workmen	70	20	10	0

TABLE 16: KEY MARKETS FOR SELF-CATERING ACCOMMODATION BUSINESSES (Base: 15)

Visitor Market	% of Accommodation Businesses Interviewed Indicating This Rating			
	Very Important	Quite Important	Slightly Important	Not At All Important
People coming to stay for a short break	53	20	7	20
People coming for a longer holiday (1 week +)	53	27	7	13
People stopping off en-route to the South Coast/West Country	0	27	33	40
People flying off from Gatwick	7	0	7	87
Overseas tourists	33	60	0	7
Walkers on the South Downs Way	20	27	20	33
Shooting parties	0	0	0	100
People attending weddings and family parties	33	53	13	0
Business visitors	20	27	40	13
Contractors and workmen	7	27	47	20

Key events that generate significant demand for accommodation businesses across the District are as follows:

- Goodwood Revival;
- Goodwood Festival of Speed;
- Glorious Goodwood and The Longines International Horse Show at Hickstead – to a lesser extent.

Other events that were identified as generating business for some accommodation establishments in the District were:

- Big Church Day Out at Wiston House, in May;
- Dunsfold Wings and Wheels
- Horsham Piazza Italia;
- Horse shows and events at Hickstead.

8.2. Potential Growth Markets for the Future

The markets seen as offering the strongest growth potential for B&Bs/guest houses, inns/pub accommodation establishments and small self-catering businesses are business visitors and people coming for a short break. Other markets seen as offering some potential are overseas tourists, people attending weddings and family parties and contractors. Some inns and B&Bs along the South Downs Way see scope to attract more business from people walking the trail. Other markets are seen by the owners of B&Bs, guest houses, inns and small self-catering businesses as offering relatively little growth potential.

TABLE 17: GROWTH MARKETS FOR HORSHAM DISTRICT ACCOMMODATION BUSINESSES

Visitor Market	% of Accommodation Businesses Interviewed Identifying This Market as Offering Growth Potential		
	B&Bs/ Guest Houses (Base: 25)	Inns/ Pub Accom (Base: 10)	Self-Catering Businesses (Base:15)
People coming to stay for a short break	20	0	27
People coming for a longer holiday (1 week +)	8	10	7
People stopping off en-route to the South Coast/West Country	4	0	0
People flying off from Gatwick	4	0	0
Overseas tourists	12	0	13
Walkers on the South Downs Way	8	20	0
Shooting parties	4	10	0
People attending weddings and family parties	12	0	7
Business visitors	36	20	13
Contractors and workmen	20	0	0
No markets offering growth potential	36	50	53

APPENDIX 6

NATIONAL TOURISM FORECASTS, MARKET TRENDS & INFLUENCES

Forecasts for UK tourism growth are favourable. Research undertaken by Deloitte and Oxford Economics for VisitBritain in 2013[1] projects an average annual growth in domestic tourism in the UK of 3% and a 6% per annum growth in inbound tourism

A number of factors affecting future tourism trends over the next five to ten years have been articulated by VisitEngland and others. Those most relevant to demand for tourist accommodation in Horsham District include the following:

- **Stronger demand for short breaks -** society has become increasingly time poor with shifting patterns of holiday taking to higher frequency short breaks, with many people now taking multiple short breaks rather than one main holiday. The number of domestic short breaks taken in England in 2015 increased by 6%.

  An ageing UK population – the percentage of the UK population over 65 is increasing. This generation is a powerful and growing economic force, with sufficient time and disposable income to enjoy regular short breaks and holidays. It offers particular scope for midweek visiting. The next generation of older people is set to be more active, leisure-focused and discerning in terms of the quality of tourist accommodation that they want to stay in and the activities that they want to do on holiday.

- **The growing Generation Y market** - people born in the 1980s and 1990s are now starting to travel independently from their parents. This new generation of short break and holiday taker is looking for a different experience from the places that they want to stay in, with a greater importance placed on distinctive design, a relaxed atmosphere and a high level of technology and connectivity. This group is characterised by a lack of knowledge of, and prejudices about English destinations, so there is a task to be done to educate it about the short break and holiday options that there are across the country.

[1] *Tourism Jobs and Growth: The Economic Contribution of the Tourism Economy to the UK*, Deloitte/Oxford Economics, November 2013.

- **Online booking and marketing -** consumers are increasingly booking accommodation through the growing number of online travel agents (OTAs) and third party websites that offer discounted accommodation and holidays such as LateRooms, lastminute.com, booking.com, Holiday Lettings, Owners Direct, Home Away and Expedia, and taking advantage of special offers promoted through voucher and daily deals sites such as Groupon, Wowcher, Living Social, Travelzoo and Secret Escapes. Demand is also growing through online homestay channels such as airbnb, Wimdu and One Fine Stay, which allow individuals to rent out rooms in their homes to tourist visitors. Accommodation businesses are increasingly using e-marketing and social media channels to reach customers. This is all resulting in an increasingly deal-driven and competitive market but enables accommodation businesses to affordably reach millions of potential customers both in the UK and overseas and allows them to proactively market their late availability, albeit sometimes at reduced rates. The growth of customer review sites, in particular Tripadvisor, is making it ever more important for accommodation businesses to deliver excellent standards of service and facilities to ensure that they achieve favourable reviews and high rankings.

- '**Mobile first'**- smart phones and tablets are increasingly being used as the first point of contact for most communications, including tourism searches, enquiries and bookings. Wireless access on holiday and information in the right format will be key. Bookings will be more 'last minute'.

- **Social networking will increase in importance** - online networks will be a vital channel for businesses for distribution, awareness creation and recommendations. Impacts of this include the amplification of negative experiences, disintermediation (consumers direct to businesses), and the 'fear-of-missing out' (FOMO), which means consumers want to share the experiences of their peers - all pointing a need for tourist accommodation businesses to deliver a high quality guest experience.

- **Demand from people attending weddings and other family occasions** should grow in line with population growth.

- **Demand from people visiting friends and relatives** should also grow as the country's population continues to increase.

- Greater interest in health and fitness and cheaper and more widely available camping equipment, outdoor clothing and bikes are fuelling growth in **interest in outdoor activities** and **health and wellness tourism**, in particular spa breaks and activity holidays as key drivers for holidays and leisure breaks.

- **Family composition** is changing – with grandparents more involved in childcare. This has implications with potentially more intergenerational family holidays and a need for appropriate accommodation products to cater for this.

- **Family and friend get togethers** for celebration weekends, reunions or weekends away is a growing market.

- There is growing demand for '**bleisure' trips**, which blend business and leisure travel, with business visitors adding on a leisure stay to a work trip or taking family members with them on business trips.

- While **environmental concerns** are not currently mainstream in terms of holiday taking decisions in the UK, there are some customers that will seek out accommodation businesses with strong eco-credentials.

- VisitBritain has identified potential for the development of **wine tourism** in the UK. Over 100 vineyards are open to visitors in the UK. Many have added restaurants, cafes and accommodation in order to attract visitors, and visitor numbers to English vineyards are increasing every year. The Wine and Spirit Trade Association (WSTA) claim that wine tourism is an 'untapped asset' for continued growth in UK tourism.

- **Ongoing growth in inbound tourism** - with the greatest volumetric growth occurring in traditional markets including the USA and Western Europe but the fastest relative growth from China and other emerging markets, such as UAE, India, Brazil, Russia and South Korea, due to the increasing wealth of consumers in these countries. The latest figures released by VisitBritain show a new record for inbound tourism to the UK in 2015, with total visits increasing to 35.8m, the sixth consecutive year of growth. VisitBritain is predicting a further 3.5% increase in 2016, with total overseas tourist visits rising to 36.7m. A new streamlined visa service introduced in August 2014 has made it easier for Chinese people to visit the UK. The number of Chinese tourist coming to the country increased by almost 40% in the first 9 months of 2015. There could however be a reduction in demand from near European markets with the slowdown in the Eurozone economy, the strength of the pound against the euro, and the possible impact of a Brexit if the UK population votes to leave the EU. It must also be recognised that London is likely to be the main beneficiary of inbound tourism growth, especially from long-haul markets. VisitBritain and the UK Government, in its new Five Point Plan for the UK tourism sector, launched in July 2015[2], are however very focused on spreading the benefits across the UK and there are opportunities for

[2] 'Backing the Tourism Sector: A Five Point Plan', Department for Culture, Media & Sport

all parts of the country to see growth in near overseas tourist markets. Overseas trips to English regions have been rising: in the first 9 months of 2015, trips to English regions outside London totaled 11.7 million, up 7% on the same period in 2014. Inbound tourism can however be vulnerable to major crises. London hotels, for example saw a significant fall in occupancy levels in November 2015 following the Paris terrorist attacks. It would only take a major terrorist attack in London or another major city for there to be a significant drop in overseas tourist visits to the UK.

APPENDIX 7

HORSHAM TOWN HOTEL DEMAND PROJECTIONS
METHODLOGY & ASSUMPTIONS

In order to provide an indication of the number of new hotel bedrooms that might be needed in Horsham Town over the next 15 years, Hotel Solutions has prepared projections of possible future growth in hotel demand in the town to 2020, 2025 and 2030. The projections assume that growth will be unconstrained by site availability and planning policy.

In projecting future requirements for hotel accommodation we have first calculated an estimate of current (2015) baseline roomnight demand for hotel accommodation in Horsham, based on the hotel occupancy data that we collected through our survey of hotel managers. To these figures we have added estimates of the roomnights that the town's hotels are currently denying (based on the information provided to us by hotel managers) to provide an adjusted baseline figure of the true (unconstrained) demand. We have then applied assumed low, medium and high growth rates to these adjusted baseline figures to calculate estimated roomnight demand for hotel accommodation in the town by 2020, 2025 and 2030.

Using these projections of future hotel demand, we have calculated the number of hotel bedrooms that our roomnight projections would support, assuming an average annual room occupancy of 75% for all hotels, as the level of occupancy that hotel developers and operators are likely to seek to achieve in Horsham. Applying these figures to current numbers of hotel rooms provides figures for the numbers of new hotel bedrooms that may be needed in the future if the projected growth in the market takes place.

Making any sort of market forecasts is an uncertain process: all forecasts are based on judgement and assumptions, and are susceptible to unforeseen changes. The projections we have prepared should thus be taken as indicative only. They have been prepared to provide an illustration of the numbers of new hotel bedrooms that might be needed under different growth scenarios. They are not intended to be accurate projections of how the market will grow, however. Clearly the further ahead that one looks, the more difficult it is to project growth accurately. Projecting as far ahead as 10 years is very difficult. The projections to 2025 and 2030 should thus be treated with caution, and should be periodically reviewed.

Assumed Growth Rates

Forecast growth in employment can be taken as a proxy indicator of potential growth in midweek corporate demand for hotel accommodation. The latest employment growth forecasts for Horsham District translate into average annual growth rates of 0.82% to 1.39%. With most of the employment growth due to take place in and around Horsham, it is not unreasonable to expect even higher employment growth rates for the town. The planned construction and infrastructure projects in the Horsham area should also result in increased midweek demand for budget hotel accommodation from the contractor market.

Growth in weekend demand is most likely to come from the weddings and visiting friends and relatives markets, and will be closely aligned therefore to population increases. The latest population forecasts for the District translate to average annual growth rates of 0.59% to 0.71%. With the greatest increase in population set to be around Horsham Town, it is not unreasonable to assume a higher rate of growth in these population-related markets in the town. There is also potential for hotels in Horsham to attract weekend break business as the town's visitor, cultural and evening offer develops and Horsham is better promoted as a place to come for a weekend away.

Taking account of these factors, we have assumed the following average annual growth rates hotel accommodation in Horsham Town through to 2030:

Horsham Town
Assumed Growth Rates in Demand for Hotel Accommodation 2016-2030

GROWTH SCENARIO	AVERAGE ANNUAL GROWTH RATE 2016-2030 %
Low	1
Medium	1.5
High	2

For simplicity's sake we have based our projections on an average annual growth rate. Clearly growth in demand will fluctuate from one year to the next. There is insufficient data to factor in different growth rates per year, however.

APPENDIX 8

RURAL VISITOR ACCOMMODATION DEVELOPMENT TRENDS IN THE UK

Hotels

Hotel Development in Market Towns

National trends in hotel development in market towns are as follows:

- The development of **Premier Inn and Travelodge budget hotels** in market towns such as Trowbridge and Devizes in Wiltshire, Leek in Staffordshire, Market Harborough and Melton Mowbray in Leicestershire, Wadebridge in Cornwall, and Bicester and Witney in Oxfordshire. As the market leaders in the UK budget hotel sector Premier Inn and Travelodge have continued to open hotels apace across the UK. They are the only national hotel chains that have the brand strength and breadth of coverage across the UK to look at developing hotels in smaller market towns. They are also prepared to look at smaller hotels. Target towns in West Sussex for one or other, or both of these hotel companies are currently Horsham, Chichester, East Grinstead, Haywards Heath, and Burgess Hill.

- Other budget brands, Ibis, Hampton by Hilton and Holiday Inn Express tend to build larger hotels and will only consider larger towns and cities.

- The development of **boutique and town house hotels** in market towns, in some cases with hotel spas, e.g.
    - The George Hotel at Cranbrook (www.thegeorgehotelkent.co.uk);
    - The George in Rye, East Sussex (www.thegeorgeinrye.com);
    - The White Horse in Romsey in Hampshire (www.thewhitehorseromsey.co.uk);
    - The Feversham Arms in Helmsley in North Yorkshire (www.fevershamarmshotel.com);
    - The 'country chic' Kings Head hotel that the Vineyard Group opened in Cirencester in September 2014 (www.kingshead-hotel.co.uk);
    - The William Cecil in Stamford in Lincolnshire (www.thewilliamcecil.co.uk).

- Some regional boutique hotel chains that are focusing on market town and rural locations have also emerged e.g. The Pig boutique hotel company with four hotels in the New Forest, Southampton, Studland Bay in Dorset and near Bath, and a fifth due to open in July 2016 at Honiton in Devon; East Anglia-based boutique hotel group The House Collection which launched in 2013 with the opening of its first two hotels in Ely and Newmarket in Cambridgeshire; Milsom Hotels, which has 4 boutique hotels in Suffolk and Essex; and Hillbrooke Hotels, which operates 4 'quirky luxury' hotels in the New Forest, Berkshire and Lincolnshire.

Rural Hotel Development

Hotel development trends in rural locations are as follows:

- At the top end of the market there has been activity in terms of the development of **luxury country house hotels**, including the opening of Lime Wood in the New Forest and the soon to open Heckfield Place near Hook in Hampshire; the £30 million development of the Raithwaite Estate in North Yorkshire as a luxury hotel and spa; the 22-bedroom, 5 star Villa Levens country house hotel to the south of Kendal in Cumbria that opened in October 2015; the Barton Hall Hotel that opened in Northamptonshire in 2014; the opening of the Ellenborough Park Hotel & Spa near Cheltenham in 2011; the redevelopment in 2012 of Wood Norton Hall near Evesham as a country house hotel; and the £30million development of The Cornwall Hotel, Spa and Estate at St Austell. Plans have also been unveiled for the development of new luxury country house hotels in Surrey (the conversion of Cherkley Court near Leatherhead); West Yorkshire (involving the conversion of Bretton Hall near Wakefield); Wigan (the transformation of the Haigh Hall stately home into a luxury boutique hotel; Cheshire (the restoration and conversion of Doddington Hall near Nantwich into a 120-bedroom 5 star country house hotel); and North Yorkshire (the conversion and extension of Grantley Hall near Harrogate into a 51 suite luxury hotel and spa).

- A number of country house hotel companies have expanded in the last 3 years. Brownsword Hotels has established the Gidleigh Collection of luxury country house hotels following its acquisition of 4 hotels previously owned by the now defunct Von Essen Hotels company. Hand Picked Hotels has acquired three new country house hotel properties near Bath and in Guernsey and Northamptonshire. Laura Ashley Hotels has opened two country house hotels in Elstree in Hertfordshire in 2013 and Windermere in the Lake District in 2014. The Northamptonshire-based Hazleton Group of Companies opened the Barton Hall Hotel near Kettering in Northamptonshire in 2014 to add to the Rushton Hall Hotel that it opened in 2006.

- **Hotel spas** have been developed at many luxury country house hotels, enabling them to tap into the rapidly expanding UK spa breaks market.

- There has been some activity in terms of the development of **alternative accommodation options at luxury country house and golf hotels** e.g.

    - Tree houses at Chewton Glen in Hampshire;
    - Eco pods at the Old Thorns Manor golf hotel at Liphook in Hampshire;
    - Luxury self-catering apartments at the Four Pillars Cotswold Water Park hotel in Gloucestershire;
    - Luxury woodland holiday homes at The Cornwall Hotel & Spa at St Austell in Cornwall;
    - Eco lodges for ownership or rental adjacent to the Barnsdale Lodge hotel in Rutland.
    - Cedar lodge suites at the Alexander House Hotel in West Sussex.

- A number of luxury country house hotels with a strong reputation for their cuisine have opened **cookery schools** e.g. Lucknam Park, near Bath; Northcote in Lancashire; Le Manoir aux Quat'Saisons in Oxfordshire and Swinton Park in North Yorkshire.

- Recent years have also seen the opening of **on-site specialist sport and leisure facilities at luxury country house hotels** e.g. equestrian centres at the Four Seasons Hampshire, Lucknam Park and Coworth Park in Berkshire and falconry centres at Stapleford Park in Leicestershire, Lainston House near Winchester, and Peckforton Castle in Cheshire.

- Recent years have also seen the development of a number of smaller **boutique country house hotels through** the conversion of country mansions, upgrading and repositioning of existing hotels, or development of redundant outbuildings at country house properties. Examples include:
  - The Cranleigh at Bowness-on-Windermere in the lake District (www.thecranleigh.com)
  - Thyme House, Southrop, Gloucestershire (www.thymeatsouthrop.co.uk)
  - The Coach House Hotel, Middleton Lodge, near Richmond, North Yorkshire (www.middletonlodge.co.uk)
  - Visit England's 'Best Small Hotel' 2014, The Old Rectory Hotel, Martinhoe, Exmoor National Park (www.oldrectoryhotel.co.uk)
  - The Clive at Bromfield, near Ludlow in Shropshire (www.theclive.co.uk)
  - Tuddenham Mill, near Newmarket in Suffolk (www.tuddenhammill.co.uk)
  - Forest Side in the Lake District (www.theforestside.com)

- **Luxury Family Hotels** was re-established in 2011 with the purchase of the Polurrian Hotel in Cornwall and the re-acquisition out of administration of 7 hotels that had previously been sold by the company to Von Essen Hotels in 2006. The company focuses on the upper end of the family break market with a luxury country house hotel product that is geared towards children.

- **Warner Leisure Hotels**, the company that specialises in hotels catering for the adult-only leisure break market has unveiled plans for a £30m redevelopment and extension of Studley Castle in Warwickshire into a new hotel. It has also invested heavily in its existing hotels in 2015, with the addition of 45 luxurious garden lodges at Bodelwyddan Castle in North Wales and a £12.5 m investment to upgrade and expand its Alvaston Hall Hotel in Cheshire, which has included the opening of an additional 113 guest bedrooms.,

- **Golf resorts** have opened in some counties e.g. Mere Golf Resort in Knutsford in Cheshire, Rockcliffe Hall near Darlington. A number of proposals have come forward for new golf resorts in various locations across the UK, including Kent (at the London Golf Club), Hertfordshire (at the Hertfordshire Golf & Country Club), Surrey (a proposal for a 100-bedroom Hilton hotel as part of the new regional headquarters of the PGA at Wildwood Golf & Country Club in Cranleigh), North Yorkshire (the Flaxby Country Resort on the existing Flaxby Golf Course near Knaresborough) and the Wirral (at Hoylake), together with a number of proposals in Scotland.

- On a smaller scale there has also been some activity in terms of the development of **hotels on golf courses** e.g. a 43-bedroom hotel at the Bowood golf course, near Chippenham in Wiltshire in 2009; a 50-bedroom hotel at The Oxfordshire Golf Club near Thame in 2010; a 30-bedroom Best Western Plus hotel at the Magnolia Park Golf and Country Club in Buckinghamshire in 2014; a 40-bedroom hotel at the Sandford Springs Golf Club near Basingstoke in 2014; the Cotswolds Club opened the 34-bedroom Cotswolds Hotel & Spa at the Chipping Norton Golf Club in Oxfordshire in November 2015.

- There has been some activity in terms of the development of **spa hotels,** with The Lifehouse Spa & Hotel at Thorpe Le Soken in Essex and The Spa Hotel at Ribby Hall Village in Lancashire opening in 2011. In Scotland, Ballogie Estate Enterprises is developing the site of a former hotel into the Ballogie Hotel & Spa, with 40 guest bedrooms and a £1.7m standalone spa facility. The project is due to open in 2016.

Inns/ Pub Accommodation

Recent and emerging development trends in the UK pub accommodation sector are as follows:

- There has been a growth in the supply of **boutique inns** in terms of the conversion of pub premises to gastropubs with boutique guest bedrooms. Examples are:

    - The Grasshopper Inn at Moorhouse on the Surrey/Kent border near Westerham (www.grasshopperinn.co.uk)
    - The Five All, Filkins, Gloucestershire (www.thefiveallsfilkins.co.uk);
    - The Lord Crewe Arms, Blanchland, Northumberland (www.lordcrewearmsblanchland.co.uk _
    - The Packhorse Inn, Moulton, Suffolk (www.thepackhorseinn.com);
    - The Bell at Ramsbury, Wiltshire (www.thebellramsbury.com);
    - The Victoria, Holkham, Norfolk (www.holkham.co.uk/victoria);
    - Royal Oak, East Lavant, near Chichester, West Sussex (www.royaloakeastlavant.co.uk);
    - Cromwell Arms, Mainstone, near Romsey in Hampshire (www.thecromwellarms.com);
    - The Wild Rabbit, Kingham, Cotswolds (www.thewildrabbit.co.uk);
    - The Hand and Flowers at Marlow in Buckinghamshire (www.thehandandflowers.co.uk).

- A number of **national pub companies have developed branded portfolios of inns**:

    - Greene King has continued to expand its Old English Inns brand and has upgraded many of the inns in this portfolio;
    - Daniel Thwaites has embarked on the development of its Thwaites Inns of Character chain of quality country inns;
    - Marston's operates a portfolio of 38 inns across the country under its Marston's Inns brand. It has opened lodges alongside the new-build pubs that that it opened in Chepstow and Aberystwyth in 2013 and has secured sites for the development of similar lodges alongside other new-build pubs that it is planning to open. Its targeting around 5 new budget hotel openings pervyear. The company launched the Revere Pub Company in 2013 as a premium pub brand, so far including 6 inns with boutique accommodation in Hampshire, West Sussex, Sheffield, Kent and Wiltshire.
    - Dorset-based brewer Hall & Woodhouse operates 33 hotels and inns in Dorset, Devon, Hampshire, Somerset, Surrey, Hertfordshire, West Sussex and Wiltshire. It has recently opened a new inn in the New Forest.
    - Shepherd Neame operates 14 hotels and inns in Kent.
    - Fuller's operates 26 hotels and inns in London, Hampshire, West Sussex and the Home Counties. It has upgraded the accommodation at a number of its pubs over the last few years, including the development of luxury boutique bedrooms at a number of them.
    - Swindon-based brewer Arkell's operates 41 hotels and inns in Swindon, Wiltshire, Oxfordshire, Berkshire and Gloucestershire. It is investing in the refurbishment of these properties, as well as adding bedrooms to some of its pub estate.
    - The Spirit Pub Company, now part of Greene King, operates the budget Good Night Inns brand alongside 29 of its pubs across the country.
    - JD Wetherspoon operates 45 hotels and inns throughout the UK under its Wetherspoon Hotels brand. Its latest hotel openings are the 18-bedroom Crown Hotel in Worcester in August 2015, and the 9-bedroom Golden Lion in Rochester in Kent.
    - Brakespear has a portfolio of 28 inns across Oxfordshire, Berkshire, Buckinghamshire, Northamptonshire, Wiltshire and Kent, a number of which have seen recent investment to upgrade their bedrooms.
    - London-based brewer Young's operates 20 hotels and inns in London, Surrey, Hertfordshire and Wiltshire, including a number of boutique properties. It acquired the boutique Lamb at Hindon in Wiltshire in 2014 as part of the expansion of its hotel portfolio.

- The Coaching Inn Group has grown from two to ten sites since launching in 2007 as the Bulldog Hotel Group. It acquired three coaching inns in 2015, including two in North Yorkshire, and is planning to expand to expand to 15 sites over the next 5 years after receiving a £20m investment from the Commer Group in January 2015.

- A number of **regional pub accommodation companies** have developed in some parts of the country, acquiring and upgrading inns with rooms e.g. Sussex Pub Group; Cotswolds Inns & Hotels; Cozy Pubs in Essex; The Agellus Collection in Suffolk; the Peach Pub Company across the Midlands; Oakman Inns & Restaurants with pubs and inns across Oxfordshire and Hertfordshire; Miller's Collection, with three inns in Hampshire and Berkshire; The Inn Collection in the North East; Town & Village Hotels, which has two hotels in North Yorkshire, one in County Durham and one in Cheshire; and London-based pub company Faucet Inns, which has opened boutique inns in Southampton and Surrey. The London-based pub company Distinct Group acquired the Cromwell Hotel in Stevenage in December 2015, which it intends to reposition as a boutique hotel and gastropub. Cheltenham-based Lucky Onion acquired the Wild Duck in the village of Ewen in Gloucestershire in November 2015 to add to its No 131 The Promenade boutique hotel in Cheltenham and 14-bedroom Wheatsheaf Inn gourmet pub-restaurant with rooms in Northleach.

Restaurants with Rooms

The number of restaurants with rooms in market towns and rural locations across England and Wales has gradually been increasing, with several new openings in the last 2 years, mostly with boutique bedrooms and in some cases self-catering accommodation. Examples include:

- The Marquis at Alkham in Kent www.themarquisatalkham.co.uk
- Rocksalt in Folkestone www.rocksaltfolkestone.co.uk
- The Bakery at Tatsfield on the Surrey/Kent border near Westerham www.thebakeryrestaurant.com
- JSW Restaurant in Petersfield, Hampshire www.jswrestaurant.com
- Mr Underhill's, Ludlow, Shropshire www.mr-underhills.co.uk
- The Whitebrook, near Monmouth in Wales www.thewhitebrook.co.uk
- The County, Aycliffe Village, County Durham www.thecountyaycliffevillage.com
- The Painswick in the Cotswolds town of Painswick www.thepainswick.co.uk

Country House Wedding & Events Venues with Accommodation

Recent years have seen the opening of an increasing number of country house wedding venues with accommodation and the emergence of a number of companies that specialise in the development and operation of such venues. Examples include:

- The Tabor Group has converted the former South Downs Hotel at Trotton, near Petersfield into the Southdowns Manor wedding and events venue, with 8 guest bedrooms and suites and a honeymoon suite (www.southdownsmanor.co.uk). The group also operates 4 other wedding venues that have accommodation in Essex, Warwickshire and Suffolk (www.thetaborgroup.co.uk)

- The Nicolas James Group has redeveloped Froyle Park, near Alton in Hampshire into a wedding and events venue with 14 self-catering apartments (www.froylepark.co.uk). The company also operates Northbrook Park in Farnham, Surrey as a wedding venue with 10 adjacent eco-cottages (www.northbrookpark.co.uk)

- AmaZing Venues has opened Stanbrook Abbey in Worcestershire in 2015 as a wedding and events venue with 52 luxury bedrooms and a private bridal suite (www.amazingvenues.co.uk/venue/stanbrook-abbey). The company operates 5 other luxury wedding and events venues in Scotland, Wales and Hampshire (www.amazingvenues.co.uk)

- Clevedon Hall in Somerset opened as a wedding and events venue in November 2014 following a £2m makeover. It has 25 luxury bedrooms and suites (www.clevedonhall.co.uk).

- The former Mariners Hotel at Millbridge, near Frensham in Surrey has been converted into the Millbridge Court wedding venue, offering 7 boutique hotel bedrooms for the exclusive use of wedding parties (www.millbridgecourt.co.uk)

- The former Mannings Heath Hotel, near Horsham in West Sussex was converted into the Brookfield Barn wedding venue in 2015 (www.brookfieldbarn.co.uk). It has 7 boutique guest bedrooms for the use of wedding parties.

- The Percy Arms Hotel in Otterburn in Northumberland is currently being converted into a French chateau inspired wedding venue – Le Petit Chateau (http://le-petit-chateau.com). Once complete the venue will be able to accommodate weddings of up to 160 guests, and will offer 30 guest bedrooms.

- The Cooling Castle Barn wedding venue near Rochester in Kent offers 15 luxury bedrooms for the use of wedding parties (www.coolingcastlebarn.com/page/accommodation)

Guest Houses and B&Bs

The guest house and B&B sector is characterised by **a continual churn** of establishments as people enter and exit the sector, often pre-retirement. The last 20 years have seen a continuous improvement in the quality of guest houses and B&Bs in the UK, particularly in terms of the provision of en-suite bathrooms. Existing operators and new entrants have responded to rising customer expectations. It is now rare to find guest houses and B&Bs that are not fully or mostly en-suite.

More recent years have seen a reduction in commercial B&B and guest house supply in many destinations, with fewer people entering the sector to replace those that have retired or exited for other reasons. Although the reasons for this trend have not been researched, our research suggests that it could be to do with increasing competition from budget hotels; the establishment of airbnb, which provides people with a more informal way to let spare bedrooms to visitors; and the regulatory burden that can deter people from setting up a b&B.

An emerging trend in some rural destinations is the development of **boutique B&Bs**, offering luxury bedrooms and bathrooms that feature contemporary interior design; high quality, locally sourced breakfasts; and in some cases spa treatments. Examples include:

- The Barn at Roundhurst, Lurgashall, West Sussex http://thebarnatroundhurst.com/
- Flowerdews, Winchester www.flowerdews.com
- Hannah's B&B, Winchester http://hannahsbedandbreakfast.co.uk/
- Grays, Bath www.graysbath.co.uk
- The Linen Shed, Faversham, Kent www.thelinenshed.com
- Field Green Oast, Cranbrook, Kent www.fieldgreenoast.com
- Quidhampton Mill, Salisbury www.quidhamptonmill.co.uk

Holiday Cottages

In terms of holiday cottage sector development trends, the housing market has a significant impact on **residential properties let as holiday accommodation**, which form the largest proportion of the stock of self-catering holiday accommodation in the UK. The downturn in the residential property market during the recession resulted in a significant increase in the numbers of residential properties available to rent as holiday accommodation. With lower house prices owners were more interested in making their properties available as holiday lets than selling at a reduced price. With the residential property market now having recovered this trend has started to reverse.

The overall **quality** of the UK self-catering offer has improved significantly over the last 20 years. Customers are demanding ever higher quality and are prepared to pay for it. Many are now looking for standards of décor, furnishings, appliances and equipment that are at least as good as, if not better than what they have at home. Customers are increasingly looking for self-catering accommodation that can deliver a 'wow' factor. Self-catering property owners are recognising that they can achieve increased lettings and higher prices if they offer high quality accommodation. The supply of 4 and 5 star self-catering accommodation has thus been increasing. Specific quality improvements in self-catering accommodation have included:

- High quality fitted kitchens, kitchen appliances and equipment, dishwashers and washer/dryers;
- En-suite bathrooms, luxury bathrooms and wet rooms, power showers, whirlpool baths, and increasingly full en-suite properties;
- Flat screen TVs and DVD and Blu Ray players, Sky Plus TV, broadband Wi-Fi, gaming stations, iPod docks and sound systems;
- Hot tubs and saunas.

At the top end of the market self-catering operators have started to offer **extra services** such as the provision of meals, food hampers, private chefs and butlers for hire, daily cleaning services, beauty treatments and accepting online shopping deliveries for guests.

The **conversion of redundant farm buildings** to self-catering accommodation has been a key trend over the past 30 years, fuelled by farm diversification grants and a planning policy framework that has generally supported the re-use of redundant agricultural buildings. The supply of this form of self-catering accommodation continues to grow and looks set to increase further. Farmers have converted barns as single self-catering units and in some cases as self-catering complexes of 2-5 units. There are also examples of more extensive self-catering barn conversion complexes that often include leisure facilities such as games rooms, swimming pools, gyms and tennis courts. More recent self-catering barn conversions have tended to be of a high quality, usually achieving a 4 or 5 star grading and sometimes other quality awards.

Examples of luxury holiday cottage complexes with leisure facilities include:

- Bardown Farm, Wadhurst, East Sussex www.bardownfarm.co.uk
- Poppinghole Farm Cottages, Robertsbridge, East Sussex www.poppingholefarm.co.uk/cottages
- Breamish Valley Cottages, Alnwick, Northumberland www.breamishvalley.co.uk
- Frith Farm House at Otterden, near Faversham www.frithfarmhouse.co.uk
- Pilgrim Nook Holiday Cottages at West Studdal, near Dover www.pilgrimsnook.co.uk
- Manor Farmhouse at Milstead, near Sittingbourne www.themanorformhouse.com

Boutique self-catering is an emerging product development trend, mirroring the development of boutique hotels, inns, guest houses and B&Bs. Such accommodation trades at the top end of the UK holiday market and typically commands premium prices. Examples include:

- Honeypot, Petham www.mulberrycottages.com/cottage/holiday-cottages-in-kent/93406-honeypot
- The Butlery, Sandwich Bay www.uniquehomestays.com/unique/details.asp?id=2585
- The Folly, Didmarton, Gloucestershire http://thefollyluxurycottage.com/
- Agra Cottage, Healey, near Ripon www.selfcateringcottages.net
- The Reading Room, Long Compton, Warwickshire www.compton-house.co.uk
- The Peren, near Hay-on-Wye, Herefordshire www.theperen.com
- Windfall Cottage, Beckford, Gloucestershire www.windfallcottage.com
- Culls Cottage, Southdrop, the Cotswolds www.cullscottage.net

Examples of letting agencies specialising in boutique self-catering include:

- Unique Home Stays www.uniquehomestays.com
- Boutique Retreats www.boutique-retreats.co.uk – specialising in boutique self-catering in Cornwall.

Another emerging product development trend in the UK has been the growth in the supply of large **'super' cottages** that can accommodate parties of up to 20-30 guests. These can be large residential properties, e.g. manor houses that are let out as self-catering accommodation or large purpose-designed self-catering barn conversions. Such properties have developed to cater for the growing demand for family and friendship get togethers, celebrations and house parties. They generally trade at the top end of the market, offering high quality, luxury accommodation. They will include large living spaces and dining areas and usually feature the latest in home entertainment systems. Some also have leisure facilities in terms of swimming pools, games rooms and snooker rooms. Examples include:

- Manor Farmhouse, Milstead, near Sittingbourne http://themanorfarmhouse.com/
- Finchocks Oast, Goudhurst www.finchcocksoast.co.uk
- The Canterbury Barn, Canterbury www.mulberrycottages.com/cottage/holiday-cottages-in-kent/80338-the-canterbury-barn
- Marris Barn, Thorganby Hall, Lincolnshire (www.thorganbyhall.co.uk/marris-barn)
- Tregulland in Cornwall (www.tregulland.co.uk)
- Pedington Manor in Gloucestershire (http://bigcottage.com/houses/pedington-manor)

A number of agencies and web-based directories have been established in the UK specialising in the letting and marketing of large self-catering properties. The key ones currently are as follows:

- Unique Home Stays (www.uniquehomestays.com)
- The Wow House Company (www.thewowhousecompany.com)
- House Party Solutions (www.housepartysolutions.co.uk)
- Acacia Cottages (www.acaciacottages.co.uk)
- The Country Castle Company (www.thecountrycastlecompany.co.uk)
- The Big Domain (www.thebigdomain.com)
- Group Accommodation (www.groupaccommodation.com)
- The Big Cottage Company (www.bigcottage.com)

The development of **Access Exceptional self-catering cottages** that are fully adapted for use by independent and assisted wheelchair users is a trend that has been very slow to develop in the UK, particularly given the growing numbers of wheelchair users that are looking to take holidays. Access Exceptional holiday cottages should include most of the following features:

- Wide doorways and corridors;
- Extra space for wheelchair users;
- Wheel-in showers, possibly with hoist rails;
- Bathrooms and toilets adapted for wheelchair users;
- Low-level kitchen counters;
- Ramps, lifts or stair lifts if needed.

Examples include:

- The Calf Shed, Bardown Farm, Stonegate, East Sussex (www.bardownfarm.co.uk)
- Mellwaters Barn, Bowes, County Durham (www.mellwatersbarn.co.uk)
- Treworgans Farm Holidays, Cornwall (www.treworgans.co.uk)
- The Hytte, Northumberland (www.thehytte.com)
- Windrush Barn, Manor Farm Holidays, Cumbria (www.manorfarmholidays.co.uk)
- Mitchelland Farm, Lake District (www.lakedistrictdisabledholidays.co.uk)
- Chestnut Lodge, Rosliston Forest lodges (www.roslistonforestrycentre.co.uk/home/lodges/chestnut-lodge/)
- Hoe Grange Holidays at Brassington in Derbyshire (www.hoegrangeholidays.co.uk/accessible-holidays)
- Our Bench, Lymington, New Forest, Hampshire (www.ourbench.co.uk)
- Nutley Edge Cottages, Uckfield, East Sussex (www.nutleyedge.org.uk/categories/accessible-cottages)

Holiday Lodges/ Holiday Lodge Parks

Holiday lodge parks offering timber holiday lodges for outright or timeshare purchase and/or rental are a new offer to emerge over the past 20 years. They have developed primarily in inland locations, often woodland or waterside settings and/or associated with other developments and activities such as marinas, golf courses (golf lodges), fishing lakes (fishing lodges), watersports or alongside hotels. Most holiday lodge parks are small – the average holiday lodge park covers 32.2 acres and has 35 lodges. Timber holiday lodges are generally seen as a more up-market and exclusive alternative to the traditional caravan holiday home: they are particularly popular with older and more affluent customers. Most holiday lodges have two or three bedrooms. Holiday lodge parks increasingly have a number of on-site leisure facilities, including restaurants, bars, swimming pools, gyms and children's play areas. Holiday lodges are generally purchased as second homes for holiday purposes. Most park operators offer a holiday rental service to owners and many make participation in such a service a condition of purchasing a lodge. Lodge owners typically live within 3 hours of their holiday lodge and are aged over 50. The lodge rentals market attracts a younger clientele, with rental holidaymakers most typically aged 31-50. The recession resulted in a significant slowdown in UK holiday lodge sales, with the reduced consumer confidence and falling house prices resulting in far fewer buyers for such holiday properties. Some operators changed their strategy to holiday letting as a result. With the recovery in the economy interest in holiday lodge ownership has returned.

There are a growing number of holiday lodge letting agencies and websites. The leading one is Hoseasons (www.hoseasons.co.uk/lodges), which has also developed the sub-brands of Autograph Lodge Holidays (www.autographlodgeholidays.co.uk) and Evermore Lodge Holidays (www.evermorelodgeholidays.co.uk). Others include Book Holiday Lodges (www.bookholidaylodge.co.uk) and its sister brand Lodges With Hot Tubs (www.lodgeswithhottubs.org.uk) and Just Lodges (www.justlodges.com).

Key holiday lodge park operators/developers in the UK are as follows:

- The Dream Lodge Group (www.thedreamlodgegroup.co.uk) – 7 sites in East Sussex, Essex, Norfolk, Suffolk, Cambridgeshire, Devon and Cornwall, and an eight under development in Berkshire.
- Forest Holidays – part of the Forestry Commission (www.forestholidays.co.uk/choose-a-cabin) – offers Golden Oak Cabins at 9 sites in Scotland, Wales, Gloucestershire, Hampshire and Nottinghamshire. Its most recent development has been a complex of 60 cabins in Blackwood Forest.).Planning permission was secured in October 2013 for a development of 78 forest cabins in Delamere Forest in Cheshire.
- Natural Retreats (www.naturalretreats.co.uk)has developed eco lodge parks in the Yorkshire Dales and North Scotland and luxury holiday home developments in Cornwall and North Wales.
- Darinian Leisure Resorts (www.darinian.co.uk) has two holiday lodge parks in Essex and the Yorkshire Dales offering luxury, contemporary lodges for rental and ownership.
- Tom Hartley Park Homes (www.tomhartleyparkhomes.co.uk), a holiday park operator with sites in the East Midlands and Home Counties is currently developing Ashby Woulds Lodges (www.ashbywouldslodges.co.uk) as a boutique leisure park with a first phase of 17 luxury holiday lodges for holiday home ownership.
- Lancashire-based holiday park operator Pure Leisure Group (www.pureleisuregroup.com) operates the South Lakeland Leisure Village holiday lodge park and two golf lodge developments in Cambridgeshire and East Yorkshire alongside 6 caravan holiday home parks in the Southern Lake District, Northamptonshire and East Anglia, some of which also offer holiday lodges for ownership or rental.

Examples of recent and current holiday lodge park developments include:

- Scampston Park Lodges, Malton, North Yorkshire (www.scampston.co.uk/park-lodges.html) – a development of 75 luxury holiday lodges for sale
- Westholme Estate (www.westholme-estate.co.uk) – Darinian Leisure Resorts' £10 million development of a former caravan holiday home park;
- The Lakes by yoo, Cotswolds (www.thelakesbyyoo.com) – a development of luxury second homes around a series of lakes
- The Cornwall, St Austell (www.thecornwall.com/stay/self-catering-woodland-homes.aspx) – 22 architect-designed 5 star woodland self-catering homes developed alongside a boutique hotel and spa
- The Sherwood Hideaway, Nottinghamshire (www.sherwoodhideaway.com)
- Flowery Dell Lodges, Richmond, North Yorkshire (www.flowerydell-lodges.com) - 15 pine lodges for rental.
- Lakes Leisure at Tarleton in West Lancashire has secured planning permission at appeal for the development of 49 holiday homes alongside the existing outdoor pursuits, water sports and caravan park.
- Yorkshire-based Luxury Lodge Group is planning to develop the £12m Forest Lakes holiday lodge park at Sutton-on-the-Forest, near Easingwold in North Yorkshire, with 46 luxury lodges, a spa, clubhouse, brasserie, delicatessen and shop.

A development that stands out from anything previously seen in the UK is the newly opened Soho Farmhouse luxury holiday village on the Great Tew Estate in Oxfordshire. Developed by Soho House & Co at a cost of £50m, the site offers 40 rustic cabins of various sizes, a 7-bedroom farmhouse and a 4-bedroom cottage, spread across the 100-acre estate. The village has five eating venues, a fleet of 19 retro milk floats delivering food and drink across the estate, and a wide range of leisure activities, including a swimming pool complex, tennis, horse riding, cycling, boating, crazy golf, five-a-side football and ice skating in winter. What makes the development unique is the village community feel that has been created.

Fishing lodges and lodge parks are a particular type of holiday lodge accommodation that has developed across the UK. These are clusters of timber lodges for sale or rental that are developed around fishing lakes for sale or rental. They can range in size from 2-3 lodges up to more extensive developments of 40-50 lodges. They vary in standard but are frequently high quality, luxury 4 and 5 star lodges. Examples include:

- Eye Kettleby Lakes, near Melton Mowbray in Leicestershire (www.eyekettlebylakes.com)- 12 luxury log cabins around a complex of eight fishing lakes
- Heron Lakes, East Yorkshire (www.heron-lakes.co.uk) – 50 lodges
- Thornham Lake, Thetford, Norfolk (www.thornhamlake.co.uk)
- Celtic Lakes Resort, Lampeter, Wales (www.celticlakesresort.com) – sixteen 5 star lodges developed around 6 fishing lakes
- Rural Roosts, near Market Rasen in Lincolnshire (www.ruralroosts.co.uk) - 8 luxury pine lodges around two fishing lakes.

Similarly, **golf lodges**, built on golf courses, for sale, timeshare purchase or rental, have been another emerging sector trend. Similar to fishing lodge developments they can range from a small number of lodges up to major golf lodge complexes. Golf lodges generally offer a high standard of accommodation. They are often developed alongside golf hotels. Examples include:

- Rutland Lodges, Greetham Valley Golf Course, Rutland (www.greethamvalley.co.uk/self-catering/rutland-lodges)
- South Winchester Lodges, South Winchester Golf Course, Hampshire (www.southwinchesterlodges.co.uk)
- Overstone Park, Northamptonshire (www.overstonepark.com/lodges) - 114 golf lodges alongside a clubhouse, leisure club and 31 bedroom hotel
- Lakeside Lodge, Huntingdon, Cambridgeshire (www.lakeside-lodge.co.uk) – seven 2-storey timber lodges alongside a 64 bedroom hotel, health club and conference and banqueting suite
- Q Lodges (www.qhotels.co.uk/luxury-lodges) – luxury golf lodges for sale or rent have been developed as part of Q Hotels' Belton Woods, Slaley Hall and Cameron House golf resorts in Lincolnshire, Northumberland and Scotland.
- KP Lodges at The KP at Pocklington in East Yorkshire (www.kpclub.co.uk/accommodation/lodges)

Eco lodges and eco lodge parks are a more recent product development. These are individual timber lodges or complexes of lodges that are built to the highest possible environmental sustainability standards and designed and operated to minimise their carbon footprint. Eco lodges will typically include features such as the use of sustainable materials in their construction, grass or sedum roofs, renewable energy sources, waste recycling, energy conservation measures and water conservation systems. Their green credentials are a key part of their marketing and many customers are increasingly choosing these types of accommodation because they want to go an eco-friendly holiday and reduce their carbon footprint. Eco lodge operators will usually also encourage their guests to take part in green activities in terms of car-free days out, walking and cycling, nature study, foraging, bird and wildlife watching, and buying local produce. Examples include:

- Natural Retreats' Yorkshire Dales eco lodge park development near Richmond (www.naturalretreats.com/uk/destinations/england/yorkshire-dales)
- Brompton Lakes, Yorkshire (www.bromptonlakes.co.uk/log-cabins-yorkshire.asp)
- Mill Meadow Eco Homes, Somerset (www.millmeadow.co.uk)
- Rosehill Lodges, Cornwall (www.rosehilllodges.com)
- Wheatland Farm Eco Lodges, Devon (www.wheatlandfarm.co.uk)
- Ludlow Ecolog Cabins, Shropshire (www.ludlowecologcabins.co.uk)
- Eagle Brae in Invernesshire (www.eaglebrae.co.uk)
- The Emerald, Carnon Downs, near Truro, Cornwall (www.emeraldcornwall.co.uk)

Holiday Villages and Resorts

The fifth UK Center Parcs holiday village opened at Woburn Forest in Bedfordshire in June 2014. It has 625 holiday villas, a 75 bedroom hotel, an indoor sub-tropical swimming complex, a choice of on-site restaurants, a spa and a wide range of indoor and outdoor leisure and sports facilities. Developed at a cost of £250 million it has been one of the largest ever leisure projects in the UK.

A new luxury 5-star holiday resort is currently being developed in Carbis Bay at St Ives in Cornwall. Una St Ives opened in August 2014 with a first phase of 29 holiday lodges for sale. Each lodge has been constructed with wood from sustainable sources and includes sheep's wool insulation, triple glazing, sedum roofs and solar panels. The site has planning permission for a further 94 lodges. The resort also has an on- site restaurant, a delicatessen selling organic Cornish food and drink products, a spa and an infinity swimming pool and leisure complex.

Plans for major holiday villages and resorts have been unveiled for a number of other locations in the UK:

- The Lightwater Valley theme park near Ripon in North Yorkshire secured planning permission in 2013 for the development of a log cabin resort with 106 holiday units.
- Planning permission was granted in 2013 for the development of the Penrhos Leisure Village on the site of the former Anglesey Aluminium works near Holyhead. The scheme includes the development of 815 holiday lodges and cottages on two separate sites, together with a 75-bedroom hotel, an indoor sub-tropical swimming complex, spa, water sports centre and restaurants.
- Cornwall Council has granted planning consent for the redevelopment of the abandoned Spirit of the West theme park at St Columb into a luxury holiday resort with 325 rental holiday homes and an indoor leisure village with swimming pool, gym, restaurants and cafes. The plans, which also include a self-catering training academy, are being progressed by the owners of the Retallack Resort & Spa near Padstow.
- Forestry Commission Scotland and Highlands & Islands Enterprise are planning to develop a £25million holiday resort next to Ben Nevis that will comprise a 5 star hotel and spa, a bunkhouse, up to 50 holiday lodges and a campsite.
- Plans were unveiled in January 2015 for the development of a £450m all-weather holiday resort at the site of Loudon Castle in Galston, East Ayrshire. The project includes 450 luxury lodges, 12 glamping units and a large indoor leisure complex with a sub-tropical pool and various sports facilities.

- In Derbyshire, plans have been unveiled for the £400m Peak Resort year-round holiday resort to be developed on a reclaimed opencast mining site in Chesterfield on the edge of the Peak District National Park. The plans include 600 holiday apartments, a hotel, hostel units, 250 woodland lodges alongside an 18-hole golf course, golf academy, sports centre, spa, conference centre, indoor adventure sports park, covered lawn games arena and bike tracks.
- In the South Downs National Park plans were unveiled in July 2015 for a £104million eco resort on the 118-acre site of the disused Shoreham Cement Works, to the north of Shoreham-on-Sea in West Sussex. The proposals include 600 eco-friendly holiday pods, an eco-hotel and conference centre, and a range of leisure attractions including natural swimming ponds, a watersports lake, rock climbing, high ropes course, mountain biking trails, an outdoor amphitheatre and Indoor auditorium for live performances and music festivals, and a range of cafes and restaurants.

Treehouses

An interesting although very niche self-catering accommodation product that has emerged in the UK in recent years is self-catering **treehouses**. A number of these have been developed across the UK, primarily as individual units. They are generally very high quality. They clearly have appeal to the family market. Center Parcs has opened a small number of luxury two-storey treehouses at its holiday villages in Sherwood Forest and Longleat Forest. Aimed primarily at the family market the treehouses include 4 en-suite bedrooms; an open plan kitchen, dining and living area; a games den (accessed along a timber walkway) with plasma TV, pool table, games console, Blu Ray player and a bar area with fridge; and a private hot tub. (www.centerparcs.co.uk/accommodation/By_Type/treehouse.jsp). Forest Holidays (the Forestry Commission) has introduced luxury Golden Oak Treehouse Cabins at its forest cabin holiday sites in Cornwall, Forest of Dean, Blackwood Forest in Hampshire, Sherwood Forest, Thorpe Forest in Norfolk and North Yorkshire (www.forestholidays.co.uk/cabins/cabins/treehouse.aspx). Other examples in the UK include:

- The Treehouse at Lavender Hill Holidays, Somerset (www.lavenderhillholidays.co.uk/properties.asp?id=101)
- Gwdy Hw, Powys, Wales (www.canopyandstars.co.uk/britain/wales/powys/living-room/gwdy-hw)
- In June 2015 the Aspinall Foundation opened the Treehouse Hotel at its Port Lympne Reserve wild animal park in Kent. It offers 10 two-bedroom lodges sited at the top of an escarpment overlooking a tree canopy, rather than actually in the trees (www.aspinallfoundation.org/short-breaks/treehouse-hotel).
- The Yurt Retreat at Crewkerne in Somerset added The Bird House treehouse to its accommodation offer in 2015 (www.theyurtretreat.co.uk/treehouse)

Caravan Holiday Home Parks

The market for caravan holiday home parks has remained relatively robust during the economic downturn, with relatively few holiday parks going into administration compared to other elements of the visitor accommodation sector such as hotels. However, the Credit Crunch did affect the sales of holiday parks, as despite market interest prospective buyers had difficulty in securing finance.

National holiday park operators will develop new holiday parks if they can find suitable sites that might be acceptable in planning terms. The difficulty of obtaining planning permission for a new holiday park has generally constrained the development of new sites however. The majority of local authorities across the country have planning policies that resist the development of new holiday parks because of their visual impact on the landscape. Flood risk issues are also a major barrier to new holiday park development. These constraints on the development of new holiday parks have however been a key factor in the robustness of the sector as it has meant that market demand has generally exceeded supply in most parts of the country.

Touring Caravan and Camping Sites

The focus of product development in the UK touring caravan and camping sector has been primarily on the **upgrading** and development of existing sites and the **extension of opening periods**, rather than on new site development. Where new sites have been developed they have generally been relatively small sites. Planning constraints impose a significant barrier on the development of large new touring caravan and camping sites in many parts of the UK, particularly for schemes that involve new buildings and/or winter caravan storage. Achieving commercially viable large touring caravan and camping site development projects is also very difficult. The **Caravan Club** and **Camping and Caravanning Club** are the main operators that have opened large new sites. They are motivated more by providing additional choice for their members than entirely commercial considerations. The Camping and Caravanning Club is continually looking for opportunities for new club sites. Sites associated with visitor attractions and leisure and sports facilities are of particular interest, for example the Club's site at the Gulliver's Kingdom theme park in Milton Keynes. The Caravan Club has acquired established touring parks in a number of locations and upgraded and developed them into new club sites. These have included sites in West Sussex, Cheshire, Lincolnshire and Scotland. It also opened entirely new club sites in Barnard Castle in County Durham in 2010, Bridlington in East Yorkshire in 2011, Strathclyde Country Park near Glasgow in 2012 and Stonehaven in Aberdeenshire in 2013. The development of Caravan Club sites is carried out using local suppliers and contractors where possible, and with an emphasis on landscaping using native species to promote biodiversity. The Club has developed an expertise in land reclamation, with a number of new sites having been developed on brownfield sites such as worked-out quarries, former railway stations and ex-service camps.

Both the Caravan Club and the Camping and Caravanning Club are investing substantially in improving their sites. The Caravan Club typically invests in excess of £10million annually in site improvement and development, while the Camping and Caravanning Club completed a 5-year, £29million investment programme in 2014. The Club invested a further £4.8million in 2014/15 and £4million in 2015/16 in site improvements including upgrading toilet and shower blacks, new reception buildings and site shops, resurfacing site roads, more hard standing and electric hook-up pitches, new children's play areas, and site security measures.

Many independent touring caravan and camping parks are also investing in improving and developing their sites and facilities. The sorts of investments that are being made include the following:

- The installation of electric hook-up points;
- The development of hard standing pitches, which allow winter use by tourers and motor homes;
- The development of fully serviced pitches with water and drainage connection;
- Investment in site infrastructure e.g. drainage, roads, lighting, signage, entrances;
- Improvements to landscaping and site layouts;
- Better quality, heated toilet and shower blocks;
- New laundry facilities;
- Leisure facilities e.g. games rooms, saunas, gyms, internet rooms;
- The development of children's play areas and improvements to existing play areas;
- Catering operations;
- On-site shops;
- Installation of Wi-Fi;
- Improved access and facilities for disabled guests;
- The introduction of camping pods and glamping units.

The **'greening' of touring caravan and camping parks** in terms of promoting biodiversity, reducing environmental impact and encouraging guests to engage in environmentally sustainable activities has also been a key trend in the sector that looks set to continue. Examples include investing in environmentally sustainable technologies for electricity generation, water heating and waste recycling; promoting bio-diversity through creating wildlife areas and planting to encourage butterflies and bees; and providing nature and orienteering trails, cycle hire and wildlife watching activities.

The Caravan Club is firmly committed to boosting its green credentials with a number of policy initiatives across its sites network, including using biodegradable and environmentally-friendly products, building with timber from sustainable sources, shredding tree prunings on site to use as mulch, and using low-energy lighting. The Club has made a major commitment to eco-friendly caravanning through a £1.8 million investment in its Poolsbrook Country Park Club site near Chesterfield in Derbyshire, including trialling a whole range of energy and water efficient technologies such as solar panels and photovoltaic cells, wind turbines, rain water harvesting and grey water recycling, geothermal energy and heat recovery ventilation systems, for possible roll out to other sites. The Club also has 43 sites that have signed up to its Boosting Biodiversity programme.

The other key development trend in the sector has been the **lengthening of the season** with many site operators now wanting to operate over a longer period and increasing numbers of sites looking to stay open throughout the year. The higher specifications of today's touring caravans and motor homes is resulting in growing numbers of owners wanting to use their caravans and motor homes throughout the year. Sites are increasingly investing in hard standing pitches to enable them to cater for this demand. Planning restrictions have not necessarily kept pace with this market demand, underpinned by concerns about permanent residential use and visual impact in the winter.

The recession, together with innovations in easy-to-erect tents and camping equipment, have stimulated strong growth in demand for **camping** in the UK.

Another emerging trend is the development of **eco camping** sites. These are small, low impact, environmentally friendly, off-grid camp sites with solar or wind powered showers and eco/ compost toilets. They often have a central campfire area and/or allow campers to have their own campfires. Some sites offer secluded and isolated pitches for individual camping. Sites may have wildlife areas and some offer nature study and environmental activities and courses. Examples are Cerenety Camp Site in Cornwall (www.cerenetycampsite.co.uk); Northlodge in Pembrokeshire (www.eco-camping.co.uk); The Secret Campsite in East Sussex (www.thesecretcampsite.co.uk); and Comrie Croft in Perthshire (www.comriecroft.com/sleep/eco-camping.html). In some cases eco camping sites also offer glamping units or glamping sites have opened eco camping sites. Eco Camp UK (www.ecocampuk.co.uk), for example, offers fully equipped bell tents alongside forest tent pitches at its Beech Estate ecological woodland camp site in East Sussex.

Camping Pods

Camping pods were first introduced in the UK at the Eskdale Camping & Caravanning Club site in the Lake District in 2008. The site has 10 camping pods priced at £43.75 per night. They are made from locally sourced timber and insulated with sheep's wool. They have hard foam floors, French windows, wooden decking areas, heaters and electric lighting. Each pod sleeps 4 people. They have proved extremely popular and have even attracted demand during the winter. The Camping and Caravanning Club has now introduced camping pods and dens at its club sites in Bellingham, Northumberland; Hayfield in the Peak District; Eskdale and Ravenglas in Cumbria; Skye; Gulliver's Kingdom at Milton Keynes; and Thetford Forest www.campingandcaravanningclub.co.uk/ukcampsites/club-glamping/camping-pods. Newfoundland Leisure Lodges, the company that manufactured the pods for these sites reports huge interest in the concept, which is rapidly developing throughout the UK. The company has now supplied camping pods to over 70 sites across the country. The YHA has introduced camping pods alongside its hostels at Malham and Grinton in the Yorkshire Dales, Hawkshead and Borrowdale in the Lake District, Stratford-upon-Avon, Manorbier in Pembrokeshire, and its South Downs hostel at Lewes in East Sussex (www.yha.org.uk/places-to-stay/alternative-accommodation/camping-pods). The National Trust is another organisation that has started to offer camping pods at three sites in the Lake District, Clumber Park in Nottinghamshire and a site in Northern Ireland www.nationaltrust.org.uk/holidays/camping/camping-pods . Holiday parks, holiday lodge parks, touring caravan and camping sites and hotels are increasingly introducing camping pods as an alternative accommodation option. Examples are:

- The Pure Leisure Group has introduced camping pods at three of its holiday parks (http://www.pureleisuregroup.com/holidays/camping-pods).
- The Hillcrest Park touring caravan park at Caldwell in County Durham (www.hillcrestpark.co.uk/pods)introduced 3 camping pods in August 2011, increasing this to 5 pods in March 2012 and 10 in October 2012 due to the strength of demand.
- The Old Thorns Manor Hotel and Golf Club at Liphook has developed a number of luxury eco pods adjacent to the hotel as an alternative accommodation option (www.oldthorns.com/home/accommodation-old-thorns-hotel-hampshire/luxury-eco-pods).
- Woodland Park Lodges at Ellesmere in Shropshire (www.woodlandparklodges.co.uk/camping-huts.html) has 5 camping huts alongside 11 holiday lodges.

Glamping

A key trend in recent years has been the rapid growth of glamping (glamorous camping) offers, in terms of ready-erected, fully-equipped tents, yurts, tipis and other unusual forms of camping and caravanning accommodation such as geodesic domes, gypsy caravans, retro caravans, safari tents, glamping pods and tree camping. These types of accommodation have proved to be highly popular with more affluent families that want to experience camping holidays but without the hassle of having to bring their own tents and camping equipment. As a new form of accommodation they have attracted significant media coverage and wherever they have opened such accommodation operations have quickly attracted strong demand. Go Glamping (www.goglamping.net), the leading online directory of luxury camping sites, now lists 286 locations in the UK.

Key luxury camping products that have so far emerged in the UK are as follows:

- **Feather Down Farms** (www.featherdown.co.uk) is a concept that has been operated in the UK since 2005 by the Feather Down Farm Days company as a seasonal luxury camping holiday option. Originally developed in Holland, the concept involves Feather Down Farm Days providing working farms with 5-10 fully equipped Feather Down tents for erection between Easter and October. The tents provide spacious, ready-to-use camping accommodation including beds, bedding, a toilet, wood-burning cooking stove, cool chest and cooking equipment. The farmer is responsible for providing a cold water supply to each tent and connection to a mains sewer or septic tank, together with the provision of a communal hot shower facility. Feather Down Farm Days runs a national marketing, advertising and PR campaign and provides a central booking system. The company currently has 29 sites across the UK. Their development strategy has focused initially on locations that are within a 2 hour drive time of London, as this is their core market. These holidays require some affluence, at circa £1000 for the week, and they recognise that they are aiming at the educated city dweller wanting rural family 'experience' for themselves and their children.

- In November 2014 Feather Downs Farms launched a sister brand, **Country Retreats** (www.featherdown.co.uk/country-retreats)in order to offer the Feather Down Farm model to a wider range of country estates. Under the new scheme, land, country estate and vineyard owners choose new, fully collapsible log cabins and/or luxury canvas lodges and become part of The Country Retreats Collection that Feather Down Farms is marketing. Owners are encouraged to personalise the interiors of the cabins/lodges and to offer a range of interesting activities for guests. Five Country Retreats sites have opened so far, in Essex, Shropshire, Cornwall, Lancashire and Scotland. The aim is to eventually expand to 50 sites across the UK.

- **Ready-pitched luxury camps:** Jolly Days Luxury Camping (www.jollydaysluxurycamping.co.uk) in North Yorkshire is a boutique campsite that offers the ultimate in luxury camping, with 8 large lodge tents with four poster beds, sofas and chandeliers, 7 vintage style tents and 7 bell tents. Shieling Holidays (www.shielingholidays.co.uk) on the Isle of Mull provides 16 fully equipped Shieling cottage tents, which take their name from the summer cottages that Highland shepherds traditionally use. The tents are equipped with proper beds and fully equipped kitchens and have electricity and gas heaters. Some also have shower and toilet facilities. Dandelion Hideaway (www.thedandelionhideaway.co.uk) in Leicestershire offers a number of canvas cottages.

- **Yurts**, based on the Mongolian yurt, are wooden frame, insulated circular tents that are usually furnished with beds, wood burning stoves and kitchen equipment. The Bivouac (www.thebivouac.co.uk) on the Swinton Estate in the Yorkshire Dales has 8 yurts and six timber frame shacks. Each yurt sleeps 5 and comes with beds, bed linen, a terracotta cold store, wood burning stove and gas burner for outdoor cooking on a wooden veranda. Lincoln Yurts at Welton in Lincolnshire (www.lincolnyurts.com) offers 5 themed yurts that are fully equipped with beds, bedding, a gas stove, BBQ and decked seating area and supported by a bathroom cabin with a Jacuzzi bath. Other examples area Hidden Valley Yurts in Monmouthshire (www.hiddenvalleyyurts.co.uk) and Yurtshire (www.yurtshire.co.uk) which has two yurt camps in North Yorkshire and one in Warwickshire.

- **Tipi** sites offer a similar set up. Examples include Wild Northumbrian Tipis & Yurts (www.wildnorthumbrian.co.uk); Lincolnshire Lanes Camp Site in the Lincolnshire Wolds (www.lincolnshire-lanes.com); Eco Retreats in Powys, Wales (www.ecoretreats.co.uk); and 4 Winds Lakeland Tipis (www.4windslakelandtipis.co.uk) in the Lake District.

- Wooden **wigwams** rented out at around 20 sites in Scotland and the North East of England are another alternative. Northumbria's Pot-a-Doodle-Do (www.northumbrianwigwams.com) has 12 wooden wigwams sleeping 4/5 people. Each wigwam is fully insulated and has electric lighting and heating. Foam mattresses are provided. The site has a central shower and toilet block, kitchen for guests' use and licensed restaurant on site.

  Wigwam Holidays is a national wigwam holiday franchise that now offers 70 sites across the UK. The company manufactures the wigwams and sells them to franchisees who then pay a franchise fee to cover the use of the Wigwam Holidays brand, marketing through the Wigwam Holidays website and online booking system, and ongoing IT, marketing and operational support.

  Springhill Farm in Northumberland (www.springhill-farm.co.uk/wigwams) offers a number of wooden wigwams alongside self-catering cottages and a touring caravan and camping site.

- Other examples of luxury camping offers include:

  - **Geodesic domes** e.g. The Dome Garden (www.domegarden.co.uk) at Coleford in Gloucestershire has 10 geodesic ecodomes equipped with wood burning stoves, beds, private flushing toilets, a fully-equipped outside kitchen area with fridge and timber en-suite hot shower. Another example is Ekopod (www.ekopod.co.uk) in Cornwall.
  - **Persian alachigh tents** , similar to yurts e.g. Penhein Glamping near Chepstow in Monmouthshire (www.penhein.co.uk)
  - **Gypsy caravans** e.g. Gypsy Caravan Breaks in Somerset (www.gypsycaravanbreaks.co.uk) and Roulotte Retreat in the Scottish Borders (www.roulotteretreat.com), which has 4 French roulette gypsy caravans for hire.
  - **Retro caravans** e.g. Vintage Vacations on the Isle of Wight (www.vintagevacations.co.uk), which has a collection of 13 vintage American Airstream and Spartan caravans for hire; Happy Days Retro in East Dorset (www.happydaysrv.co.uk) with 4 airstream caravans available for hire for holidays; and Mad Dogs and Vintage Vans in Herefordshire (www.maddogsandvintagevans.co.uk), which has 4 vintage caravans.
  - **Shepherds Huts** e.g. Herdy Huts in the Lake District (www.herdyhuts.co.uk) and Shepherds Huts South East (www.shepherdshuts-southeast.com) in Kent.

- **Safari Tents** e.g. Port Lympne Wild Animal Park in Kent (www.aspinallfoundation.org/short-breaks) has developed two safari tent encampments - Livingstone Lodge and Elephant Lodge overlooking the elephant paddocks, and the Camping and Caravanning Club has 4 safari tents for hire at its club site at Gulliver's Kingdom theme park at Milton Keynes and one at its club site at Teversal in Nottinghamshire. (www.campingandcaravanningclub.co.uk/ukcampsites/club-glamping/safari-tents/). Another example is A Little Bit of Rough at Uppingham in Rutland (www.alittlebitofrough.co.uk)
- **Medieval Glamping** e.g. Warwick Castle has 41 ready-to-bed medieval-themed tents and guests are served breakfast at medieval-styled tables in a banqueting tent. They are also offered medieval-themed evening entertainment, including archery, a jester's school and knight's school and medieval games (www.warwick-castle.com/accommodation/mediaeval-glamping-at-warwick-castle.aspx). Leeds Castle in Kent offers 8 striped canvas pavilions based on a medieval design as its Knight's Glamping site (www.leeds-castle.com/Accommodation/Knight%92s+Glamping)
- **Tree camping** in tents and structures suspended in trees e.g. Red Kite Tree Tent in Mid Wales (www.sheepskinlife.com/relax-at/red-kite-tree-tent), The Tree Tent at The Secret Campsite in East Sussex (www.thesecretcampsite.co.uk/secret-shelters), and Treehotel in Sweden (www.treehotel.se), which features 5 quirky, individually designed 'treerooms' and a tree sauna.
- **Bubble camping** in transparent inflatable tents was introduced in France in 2010 but has yet to come to the UK (www.bubblecabins.com)
- **VW camper van pop-up camps** e.g. Volkswagen Commercial Vehicles partnered with booking website LateRooms in 2014 to provide 6 VW California camper vans for hire on a nightly basis at Temple Island in Henley-on-Thames
- **Cargo pods**, converted from shipping containers have been introduced at the Lee Wick Farm glamping and touring site at St Osyth, near Clacton-on-Sea in Essex (www.leewickfarm.co.uk).
- **Converted train carriages** e.g. Long Hill Carriage at Cucklington in Somerset is a restored 1882 Great Western Railway carriage that provides a living space and kitchen alongside an en-suite double bedroom in an adjacent converted 1950s goods wagon (www.longhillcarriage.co.uk)

- **Converted lorries** e.g. Cedar Valley in the Meon Valley in Hampshire offers a converted horse lorry as a glamping unit sleeping 3 people, alongside safari tents, a yurt and a campsite (www.cedarvalley.co.uk/betty/about-betty)
- **Champing** (camping in a church) - the Churches Conservation Trust offers champing at four of its churches in Kent, Cambridgeshire and Northamptonshire. Guests enjoy a full breakfast delivered to the church in the morning, made using local produce. The Trust also arranges activities for champing guests, including walks, canoe trips, storytelling and meditation (www.visitchurches.org.uk/champing).

Youth Hostels

The Youth Hostels Association has been going through a programme of network renewal since 2006. This saw the disposal of 32 hostels between 2006 and 2008 and reinvestment of the proceeds in upgrading the remaining hostels in the network and some new hostel openings, including a new hotel in Eastbourne in 2009. A number of the hostels that YHA sold subsequently re-opened as independent hostels, in some cases benefiting from YHA marketing support through the YHA Enterprise scheme. A new capital strategy was launched in 2010. This has focused on further rationalisation of the YHA hostel network to generate £40million for reinvestment in hostel improvements and some new hostels. This has included the development of the new YHA South Downs hostel at Itford Farm near Lewes in 2013 and the YHA Eden Project in Cornwall in 2014, which was built by portable hotel company Snoozebox and is made entirely from shipping containers. It offers 54 contemporary en-suite bedrooms for 2 to 4 guests. YHA's latest hostel openings are the new YHA Brighton in the former Royal York Hotel, which opened in November 2014, and the new YHA Cardiff, which opened in March 2015. YHA is currently progressing plans for a new 86-bed hostel as part of The Sill landscape discovery centre project in the Northumberland National Park, due to open in summer 2017.

Children's Activity Holiday Centres

The children's activity holiday centre sector is rapidly expanding in the UK and is identified as having good potential for further expansion[3]. The sector is made up of many different operators, from those with multiple centres across several countries to smaller, family-run independents. Centres range in size from 50 to 900 beds and are operated largely by the private sector but also by local authorities and charitable organisations.

The two main players in the sector are PGL and Kingswood. Both companies have been the subject of high profile acquisitions. PGL was acquired by Holidaybreak plc. in May 2007 for £100m. Kingswood was acquired by DJL Merchant Banking (a division of Credit Suisse Bank) in July 2008, also for £100m. Both companies have since nearly doubled in size and now handle around 500,000 children each year. PGL opened the former Windmill Hill Place Tennis Centre near Herstmonceux in East Sussex as a children's activity holiday centre in May 2009 following a £7m revamp. The centre now offers activity courses for school and youth groups, together with summer camps and family activity holidays during the summer. The centre can accommodate up to 450 guests in bunk –bedded accommodation and new 4-6 person en-suite lodges. Facilities include a sports hall, swimming pool, climbing tower and zip wires and a multi-sports area. Existing lakes are used for canoeing and raft building. The centre has created 130 jobs. PGL also opened a new holiday centre at Liddington, near Swindon in 2010 through the conversion of the former Liddington Hotel. It can accommodate up to 1,000 children and employs 250 staff. Kingswood is currently looking for a site for a new centre in the Oxfordshire/Berkshire/Buckinghamshire/Wiltshire area/

The other key player in the children's activity holiday centre market is JCA Adventure, which became part of TUI Travel plc. in 2007. It works with 13 UK centres and two centres in France to provide multi-activity courses of 2-4 nights, netball tournaments and summer camps for young people. The company launched its first JCA-owned activity holiday centre at Condover Hall in Shropshire in 2011.

For new centres these operators would require properties of a substantial size within their own formal grounds ideally with access to lakes, rivers and woodland. They will consider leaseholds and freeholds in rural and semi-rural locations. A residential institution use class (C2) on properties such as former boarding schools or residential colleges can be an advantage but is not essential.

[3] The information provided on the UK children's activity holiday centre sector is taken from an article published in Strutt & Parker's Leisure Comment journal in 2009 – 'Room to Grow. Duncan Willard

Wellness Retreats

A nascent trend that may develop further in the UK is the development of wellness retreats. Current examples include:

- ecoYoga in Argyll (www.ecoyoga.org)runs yoga courses, retreats and holidays in self-catering accommodation. The site offers a range of bathing facilities including rainforest showers, a large hot tub, artisan sauna and two wild river hot baths.
- Slimmeria Retreat in Crowhurst in East Sussex (www.slimmeria.com), which offers detox, fitness and weight loss holidays in a Georgian country house offering boutique hotel bedrooms and a luxury health spa.
- Tofte Manor at Sharnbrook in Bedfordshire (www.toftemanor.co.uk) is a manor house wedding and events venue that offers a range of wellness retreats and inspirational workshops including massage, meditation, yoga and labyrinth walking. It has 12 luxury guest bedrooms and can also offer accommodation in yurts and tents with outdoor hot water showers for larger groups.
- Brightlife (www.brightlife.com) is a country house on the outskirts of Ramsey on the Isle of Man, which offers a range of wellness courses and retreats, from yoga and pilates to chakra healing and life coaching. It has 12 luxury guest bedrooms and opened a new spa in 2015.
- The Reynolds Retreat health, fitness and wellbeing centre at Borough Green, near Sevenoaks in Kent is in the process of adding accommodation (www.reynoldsgroup.co.uk/retreat/accommodation).

Vineyard Accommodation

A number of vineyards across England and Wales provide accommodation in terms of B&B rooms, self-catering holiday cottages and lodges, restaurants with rooms and small hotels, often offering wine tours as part of an accommodation package. Examples include:

- Denbies Wine Estate, Dorking, Surrey – a 7-bedroom, 4 star farmhouse B&B (www.denbies.co.uk/accommodation).
- Three Choirs Vineyard, Newent, Gloucestershire – a restaurant with rooms and wooden cabins in the vineyard (www.three-choirs-vineyards.co.uk/gloucestershire/rooms-and-lodges/).
- The English Wine Centre, Berwick, East Sussex – opened the Green Oak Lodge in 2011, with 5 boutique guest bedrooms (http://englishwinecentre.co.uk/lodge).
- Jabajak, Carmarthenshire – 10-bedroom vineyard restaurant with rooms (www.jabajak.co.uk).
- Camel Valley Vineyard, Cormwall – two holiday cottages (www.camelvalley.com/stay)
- Valley Farm Vineyards, Suffolk – a self-catering barn conversion (www.valleyfarmvineyards.co.uk/accommodation/4584721095)

APPENDIX 9

UK HOTEL DEVELOPMENT - FUNDING CONTEXT

The Economic Backdrop

The fortunes of the hotel industry are closely aligned to the national and local economy and so the economic downturn that began in 2008 and the subsequent climb out of recession has hit the sector in a number of ways. Hotel performance fell back with occupancy dropping below 70% from 2009, only recovering to pre-recession levels in 2013. In terms of achieved room rates, they have taken until 2014 to recover to these levels. The drop in performance affected end values in some cases to the point where it would cost more to build a hotel than its value, resulting in hotel investors holding back on new build schemes until yields improved. This has made funding more difficult to secure, especially for small hotel companies and franchisees, and when available often on less favourable terms, with less debt funding and more equity required. These trends have had implications for the type of new hotel being delivered, favouring conversions and re-brandings alongside refurbishment and improvement, encouraged by the ability to buy existing hotel stock at less than replacement value.

As a result of this risk-averse climate, many hotel companies are now focusing on asset-light development strategies that don't involve them in capital outlay. A number of 4 star and luxury international brands like Hyatt and Millennium & Copthorne have for some time only done management contract deals, but certainly their prevalence has spread as funding has become more difficult to secure. These schemes involve significant levels of investment and what the operator brings to the table is their sector expertise and brand strength. This reinforces an earlier trend in the sector pre-recession, for hotel companies to divest themselves of their property assets whilst retaining the contract to operate – Hilton and Accor are good examples.

Whilst funding 3 and 4 star hotels has been a challenge during the economic downturn, budget hotel development has continued apace: Travelodge and Premier Inn have remained active, offering the advantage of their ability to take lease deals in developer-led schemes. One advantage of the downturn in the property market has been that residential and some commercial sites have come forward for hotel development that would not previously have been available or affordable. A weaker market has also seen some distressed hotels coming onto the market being bought up by chain hotel companies and re-branded. London is also an increasing focus of hotel development interest, driven by strong performance and the 2012 bounce.

PwC identifies a solid return to revpar growth as critical to de-risking hotel investment; with revpar having turned the corner in 2014, access to finance should improve and the pace of new hotel development should accelerate. Growth will vary between regions and segments, with London likely to continue to see the highest growth in supply, and key regional cities having the largest active hotel development pipelines. The structural shifts that have taken place continue to squeeze the middle, with budget hotels making up 50% of total pipeline schemes identified in PwC's hotel forecast, and the four and five star segment accounting for almost 40%.

In overview, the Credit Crunch and recession have inevitably had an impact on reining in the development plans of hotel companies, and seen new routes to delivery emerging. The upturn in the hotel market and economic growth looks likely to improve the climate for hotel investment, though in counterbalance the up-turn in demand from residential and office markets will mean greater competition for land, making it harder and more expensive to acquire sites.

Hotel Business Models & Funding Routes

Hotels can be developed and operated under a number of different business models (summarised in the table overleaf) with hotel brand owners, franchisees and property developers playing different roles in each case, with development and operating risks shifting under the different models.

The levels of capital outlay as well as development risk required by a hotel company therefore vary considerably between these options. Many more hotel operators, particularly at the 4 star level, which is much more capital intensive, are likely to be interested in options put to them that involve management contracts than in building and funding hotels themselves, as access to capital will naturally restrict the latter and require hotel companies to prioritise their investment locations.

Many of the chain hotel companies will have a mix of the above structures in place, though some do prefer a single route. Often franchisees are looking to build the asset value of the company with a view to exit within a 5-10 year period, and in such situations are less likely to be interested in lease options.

HOTEL DEVELOPMENT & OPERATING MODELS		
	Property Company Risk	**Hotel Company Risk**
Hotel company (hotel brand owner) develops the hotel & subsequently operates and markets under one of its brands e.g. *InterContinental Hotel Group(IHG) builds and operates a hotel under its Holiday Inn brand*	x	√
Hotel company (hotel brand franchisee) develops the hotel then operates and markets under a hotel brand through a franchise deal with the owners e.g. *Sanguine Hospitality builds a hotel and operates it under a Holiday Inn franchise agreement with IHG*	x	√
Property company develops the hotel & seeks a hotel company to lease the hotel e.g. *Equity Estates builds the hotel and leases to Travelodge*	√	√ (depending on the type of lease)
Property company develops the hotel & seeks a hotel company to purchase the freehold of the hotel	√	x
Property company develops the hotel & employs a hotel company to manage the hotel under a management contract	√	√ (some depending on the terms of the management agreement)

Lease models require a little more explanation, as there are some key issues surrounding lease structures that are impacting upon the ability to deliver hotel developments currently. Developers require hotel operators to take a fixed lease, a standard institutional lease that will give a guaranteed fixed payment per room over a period of 20-30 years. Once secured, this guaranteed income stream makes the development fundable, and the developer can secure finance on the back of this. On completion the developer may retain or sell the investment. Currently, only Travelodge and Premier Inn are able to take such leases, as only they have the strength of covenant required. One or two of the multiple brand chains have taken leases, but generally these will only be for large hotels in premium locations such as London or Edinburgh, where occupancy and high rates are guaranteed. There are accounting implications of fixed leases also, as they represent a financial commitment going forward, and this has also put hotel companies off this model.

More favoured by hotel companies are variable leases, made up of a combination of base rental and a share of turnover. Some guarantees can be built into these arrangements, but should the market fall back, the risk and impact is shared by the developer/funder and the operator. Their responsiveness and flexibility accounts for their appeal to hotel companies. Certainly in previous recessionary climates, fixed leases have contributed to the downfall of hotel companies, as they became unable to meet their rental commitments when trading performance fell back. However, there is evidence that these turnover leases make it difficult to fund development because they don’t give the same fixed income stream.

The differing objectives and requirements of developers/investors and operators has led to something of an impasse and resulted in it being difficult to get hotel schemes off the ground. During our consultations with hotel companies we have come across numerous schemes and sites that have stalled for this reason, with few hotel operators able or willing to do the sort of deal the funding institutions require.

The funding climate and the changes in the way that hotels are being delivered has had an impact on the development strategies of hotel companies, with schemes increasingly developer and/or investor-led. Many hotel developers and operators have stopped having target lists of locations where they would like to be, rather considering schemes on an individual basis, if they are live. Many are willing to respond to specific sites and schemes, and to work with a developer on sites and locations to determine the strength of the market and the most appropriate brand to consider. From a destination or landowner point of view, the response should be about making the case and evidencing the potential.

The difficulty in securing funding for hotel schemes has also led to other interventions being used to secure hotel schemes. Local authorities have begun to provide funding to support the development of hotels as part of strategically important mixed-use schemes and the conversion of architecturally important buildings to hotels. In Hampshire, Eastleigh Borough Council has funded the development of a new Hilton as part of the development of the Ageas Bowl cricket ground on the edge of Southampton. In Newcastle the City Council has played a pivotal role in enabling Silverlink to secure the funding package for phase 1 of the Stephenson Quarter through acquiring the site for staged buy-back. Travelodge has been working with a number of local authorities nationally, where the Council has invested in the hotel; an example is the Redhill Travelodge and town centre mixed use scheme in Surrey. IHG have also worked on several projects involving Council funding of hotels, most recently for Holiday Inn and Holiday Inn Express hotels in Stockport and Blackpool. In each case the Council has funded, developed and owns the hotel – or bought it back off the developer – and taken a franchise with IHG, with an option to put in place a management company.

APPENDIX 10

HORSHAM DISTRICT - POTENTIAL TOURIST ACCOMMODATION PROJECTS - AS AT JULY 2016

Name Of Site	Location	Proposal	Source
Hotels - Horsham District			
South Lodge Hotel	Lower Beeding	The hotel has planning permission for a spa facility and 6 eco lodge accommodation pods in the grounds. Work is due to start on the spa in Autumn 2016, with a view to a 2018 opening. The eco lodges will be a longer-term project	Planning/ Hotel Manager Survey
Amberley Castle	Amberley	The hotel is planning to refurbish the rest of its bedrooms	Hotel Manager Survey
Ghyll Manor	Rusper	The hotel will embark on a 3-year refurbishment programme from 2016	Hotel Manager Survey
Slinfold Park Golf Club	Slinfold	Extensions to the existing clubhouse to provide a 70-bedroom golf lodge, additional treatment rooms, function space, and golf academy - permission granted January 2016	Planning
Inns			
The Owl at Kingsfold	Kingsfold	Construction of linked building to provide 8 letting bedrooms and manager's accommodation – approved 2013	Planning
Kings Head	Billingshurst	Renovation and alteration of existing public house and guest bedrooms and new extension to provide a restaurant/function room with 4 guest bedrooms above – providing 9 guest bedrooms in total – planning pending	Planning
Self-Catering			
Nightingale Hall Barn	Henfield	Convert builders store to holiday let – permission granted 2010	Planning

Name Of Site	Location	Proposal	Source
Merrion Lodge	Partridge Green, Horsham	Erect holiday cottage – permission granted 2010	Planning
Pond Farmhouse	Southwater, Horsham	Change of use from garage to holiday let – permission granted 2010	Planning
River Chalet	Amberley, Arundel	Change of use of granny annex to holiday let – permission granted 2010	Planning
Bryants Platt Farm	Shipley, Horsham	Conversion of outbuilding to holiday accommodation – permission granted 2010	Planning
Steam Barn	Amberley, Arundel	Conversion of outbuilding to holiday let – permission granted 2011	Planning
Winters Farm	Hardham, Pulborough	Conversion of farm outbuilding to holiday accommodation – permission granted 2011	Planning
Lancasters	Henfield	Change of use of ancillary accommodation to holiday accommodation – permission granted 2011	Planning
Baldwins	Cowfold, Horsham	Change of use of ancillary building to holiday let – permission granted 2012	Planning
Champions Farm	Thakeham, Pulborough	Conversion of garage to holiday let – permission granted 2012	Planning
Oldfields	Woodmancote, Henfield	Conversion of barn to holiday let – permission granted 2012	Planning
Southborne Court	Copsale, Horsham	Change of use of annexe to holiday let – permission granted 2012	Planning
Maple Farm	Warnham, Horsham	Conversion of coach house to holiday let – permission granted 2012	Planning
Lock Farm Cottages	Partridge Green, Horsham	Change of use of studio and garages to garages and holiday accommodation – permission granted 2012	Planning
Eastfield Wood	Slinfold	Use of timber cabin as holiday accommodation – permission granted 2012	Planning
Danefold House	Partridge Green, Horsham	Conversion of stable to holiday let – permission granted 2013	Planning

Name Of Site	Location	Proposal	Source
Pot Hill House	Dial Post, Horsham	Conversion of ancilliary building to holiday let – permission granted 2013	Planning
Lordings Farm	Billingshurst	Conversion of cattle byres to holiday let – permission granted 2013	Planning
1 Cootham Brow	Storrington, Pulborough	Change of use from garage and workshop to holiday let – permission granted 2013	Planning
Broadmere Farm	Henfield	Conversion of outbuilding to holiday let – permission granted 2014	Planning
Freeland Farmhouse	Bog Common, Pulborough	Conversion of stable unit to holiday let – permission granted 2014	Planning
Grays Farm	Henfield	Conversion of barn to holiday let – permission granted 2014	Planning
West Wantley	Storrington, Pulborough	Development of holiday let on site of stables and dairy – permission granted 2014	Planning
Grays Farm	Henfield	Change of use of annexe to holiday let – permission granted 2014	Planning
Fantasy House	Steyning	Alterations to form holiday let and office – permission granted 2014	Planning
Timbers	Small Dole, Henfield	Change of use of ancillary accommodation to holiday let and occasional B&B – permission granted 2015	Planning
The Barn, Two Woods Estate	Pulborough	Change of use of first floor of clubhouse to holiday let – permission granted 2015	Planning
West End House	Henfield	Extension and alterations to provide holiday let – permission granted 2015	Planning
Studio 2, Park Rd	Henfield	Change of use of office to holiday let – permission granted 2015	Planning
Birchwood Cottages	Southwater	Change of use of barn to holiday accommodation – permission granted 2015	Planning
Stammerham Cottages	Rusper	Erection of log cabin for holiday let – permission granted 2015	Planning

Name Of Site	Location	Proposal	Source
Holiday Lodge Complexes			
The Orchard (Tabby Cat)	West Grinstead	Construction of 8 eco holiday lodges and a campsite for 50 occupants, plus associated washing facilities and ranger centre – permission granted 2012	Planning
Blacklands Farm	Henfield	Erection of 6 log cabins – permission granted 2013	Planning
Touring Caravan and Camping Sites			
Washington Caravan & Camping Park	Washington	The site operator is considering plans to extend the site into a second field for up to 40 tents, with the development of a toilet and shower block. He would also like to add further hard standing pitches.	Operator Survey
Fairoaks Camp Site	Wiston	The site owner would like to develop a toilet and shower block if he could secure planning permission	Operator Survey
Blacklands Farm Campsite	Henfield	The site owner would like to expand the site and introduce more hard standing pitches	Operator Survey
Larkins Park	Brook Green	Currently applying for change of use to a residential park home park	Planning
Holiday Parks			
Honeybridge Park	Dial Post	The park's owners would like to convert tent pitches to increase the number of owned caravan holiday homes. They would also like to increase the number of hard standing pitches for touring caravans and motor homes in order to help extend the season.	Operator Survey

Name Of Site	Location	Proposal	Source
Glamping			
Two Woods Estate	Pulborough	Use of land for glamping – 5 safari tents, 5 shepherd's huts, shower block and parking – permission granted 2015	Planning
Sumners Ponds	Barns Green	Introduction of 4 luxury shepherd's huts – 2016. The site owners would also like to further develop the site's glamping operations in order to help extend the season.	Operator Survey
Bat and Ball	Billingshurst	Introduction of 2 shepherd's huts to provide additional accommodation capacity at the pub - 2016	Internet Research
Group & Youth Accommodation			
Lodge Hill Centre	Watersfield	The centre has a Vision Plan that includes relocation of offices and a kitchen to provide additional accommodation capacity, together with improvements to disabled access and facilities.	Operator Survey

APPENDIX 11

HORSHAM HOTEL DEVELOPER TESTING – SAMPLING & RESPONSE

HOTEL COMPANY	RESPONSE	INTEREST	BRAND	STANDARD
Accor	Y	Y	Ibis	Budget
Bespoke	Y	Y	Bespoke	Boutique
Beyonder/SACO				
Bridge Street				
Cathedral Hotels				
Fullers	Y			
Greene King	Y	Y	Greene King Inns	Budget
Hall & Woodhouse				
Hilton	Y	Y	Hampton by Hilton Hilton Garden Inn	Upper tier budget 3 star
IHG	Y	Y	Express by Holiday Inn	Upper tier budget
Limewood Group	Y	N	The Pig	Boutique Inn
Moxy	Y	N	Moxy	Budget boutique
Nicholas James Group				
Premier Inn	Y	Y	Premier Inn	Budget
Taylor Walker				
Travelodge	Y	N	Travelodge	Budget
Village				

APPENDIX 12

PUBLIC SECTOR FUNDING OF HOTEL DEVELOPMENT SCHEMES IN THE UK

1. Introduction

Public sector funding in one form or other is increasingly being used to support hotel development schemes across the UK in terms of:

- Tax allowances for the conversion of redundant office buildings to hotels;
- Local authority borrowing at preferential rates;
- Growth fund grants;
- Heritage grants for the conversion of historic buildings to hotels;
- Local authority freehold purchase of a building for hotel conversion;
- The contribution of local authority owned land or properties for hotel development;
- Local authority partnerships with universities.

Such public sector investment in hotel schemes is being justified in terms of:

- Finding a new use for a redundant building;
- Enabling a strategically important hotel that cannot secure bank finance to proceed;
- Kick starting and enabling key regeneration schemes that include a hotel as a component;
- Generating an income stream for a local authority at no cost to the tax payer;
- Helping to boost tourism growth;
- Job creation.

Examples of these types of public sector funding of hotel projects are given in the following paragraphs.

2. Business Premises Renovation Allowance (BPRA)

The Business Premises Renovation Allowance (BPRA) scheme was introduced under the Finance Act 2005 to bring redundant offices and business premises in disadvantaged areas that have been unused for at least a year back into use. The scheme gives an investor a tax allowance of 100% on expenditure incurred in the conversion and renovation of unused business premises. The scheme runs until 31 March 2017 for Corporate Tax and 5 April 2017 for Income Tax.

Hotel BPRA structures typically involve investors obtaining BPRA by investing either via a form of trust or via a special purpose vehicle – which can take the form of a limited partnership or limited liability partnership depending on the details of the specific transaction and/or jurisdiction. The partnership may own both the hotel and the hotel operating company. The operating company is able to enlist the services of a specialist hotel operator or alternatively the hotel may be leased to a hotel company.

An overview of how a hotel BPRA scheme is structured and operated is give below. Models seen to date involve buying an office block in a city centre and converting it to a hotel. The numbers can look something like this:

Cost of office building:	£2m
Cost of renovation:	£10m
Total expenditure:	**£12m**

It is the renovation cost of £10m that attracts the BPRA. A typical scheme will involve a combination of investors' monies and bank finance along the following lines:

Investor capital:	£6m
Bank finance:	£6m
Total capital:	**£12m**

And therefore as far as the qualifying tax relief is concerned the numbers in this example work out as follows:

Qualifying expenditure:	£10m
Tax rebate for 45% taxpayers:	**£4.5m**

Producing a final net position of:

Investors' contribution:	£6m
Investors' tax rebate:	(£4.5m)
Net cash invested:	**£1.5m**

Therefore, in this example, investors now own a £12m property (subject to a £6m mortgage) with just a £1.5m net investment. The bank finance needs to be serviced and that is done through the rent received from the tenants. This can either be through a straightforward rental agreement with an arm's length tenant but, more typically, the investors also own the company running the hotel (sub-contracted to a specialist management team). The rent is used to pay the loan interest and loan capital.

Hotel developers in particular have been able to take advantage of BPRA. A typical investment scheme involves buying a dilapidated, unoccupied office building for a low capital value and spending a large sum of money converting it into a branded hotel, such as "Hampton by Hilton", "Hotel Indigo", "Holiday Inn Express" or similar, with a good dose of leverage. Investors then hold the hotel for seven years with a view to selling once the qualifying period has expired. The reason BPRA works so well for hotels is because the higher the cost of the works as a proportion of total costs the higher the tax relief, and converting an office building into a hotel is an expensive business.

BPRA has been widely used to help fund hotel schemes in major cities with Assisted Area wards, including Liverpool, Cardiff, Newcastle, Birmingham and Glasgow. Examples are listed in the table overleaf.

BPRA HOTEL SCHEMES

Hotel/ Location	Standard	Bedrooms	Date/Year Opened	Total Cost £m
Liverpool				
Titanic Hotel	4 star	153	June 2014	36
Z Hotel	Budget Boutique	92	April 2013	4
Hotel Indigo	Boutique	151	2011	15
Birkenhead				
Premier Inn	Budget	67	Jan 2015	5
Birmingham				
Holiday Inn Express Birmingham Snowhill	Upper-Tier Budget	224	June 2013	23
Hampton by Hilton	Upper-Tier Budget	285	2012	30
Premier Inn Birmingham Waterloo Street	Budget	153	n/k	22
Newcastle				
Hotel Indigo	Boutique	148	June 2012	20
Hampton by Hilton	Upper-Tier Budget	160	Mar 2015	n/k
Tune Hotel	Budget	104	Oct 2014	8.3
Cardiff				
Hotel Indigo	Boutique	100	2016	13.75
Middlesbrough				
Holiday Inn Express	Upper-Tier Budget	138	Aug 2015	12.4
Glasgow				
Ibis Styles	Budget Boutique	101	Oct 2015	7
Travelodge Queen Street	Budget	171	2015	16.4
Park Inn Glasgow City Central	3 star	91	Apr 2013	10.5
Hotel Indigo	Boutique	95	Apr 2011	n/k
Hampton by Hilton	Upper-Tier Budget	88	2014	11
Wigan				
Premier Inn	Budget	83	n/k	n/k
Llandudno				
Travelodge	Budget	82	n/k	4.6
Bude				
Premier Inn	Budget	55	n/k	n/k

3. Local Authority Borrowing at Preferential Interest Rates

A number of local authorities across England have used their prudential borrowing powers to take our preferential rate loans to help fund hotel schemes, typically entering into a lease arrangement with a hotel operating company to generate a rental income to repay the loan and in some cases generate a surplus profit for the authority. This has enabled a number of hotel schemes that have been unable to secure commercial funding to go ahead, at no cost to Council tax payers and in some cases giving an investment return to the council. Examples are as follows:

Travelodge Partnerships with Local Authorities

Travelodge has been working in partnership with a number of local authorities to develop new hotels with funding from low interest government loans from the Treasury through the Public Works Loans Board. The hotels are built on local authority land and leased to Travelodge on a 25-year term, with the councils repaying the debt using the rental income from Travelodge and any other tenants. Travelodges have so far been developed using this mechanism in Eastleigh and Aylesbury, and are currently being progressed in Bicester, Thetford and Redhill. When complete the local authority can choose whether to retain ownership of the hotel or to sell it with Travelodge as the operator.

Pullman Hotel, Liverpool

Liverpool City Council is currently funding the £66m Exhibition Centre Liverpool and Pullman Hotel adjacent to the Liverpool Arena and Convention Centre (ACC Liverpool) on Liverpool's waterfront, through borrowing that will be supported directly from the revenue generated by the expanded ACC Liverpool campus. The scheme will thus be funded at no cost to tax payers. The hotel will have 216 bedrooms and be of an upscale 4 star standard. It will act as the headquarters hotel for conferences and exhibitions taking place at convention and exhibition centres. Exhibition Centre Liverpool is one of Mayor Anderson's priority projects. Having an on-site 4 star hotel is seen as critical to its success. After initial investigations to find a private sector partner to fund and develop the hotel failed the City Council decided to fund the hotel directly itself alongside its funding of the exhibition centre. The hotel will be wholly owned by the City Council and operated under management contract by Branded Hotel Management through a franchise agreement with Accor Hotels.

Crowne Plaza Newcastle

Newcastle City Council has borrowed £30m to help fund the development of the 250-bedroom 4 star Crowne Plaza hotel as part of the first phase of the Stephenson Quarter business district scheme in Newcastle city centre. This is a key regeneration project that the City Council sees as being of vital importance to the future development of Newcastle. The developers, Silverlink Holdings (now renamed as the Coulston Group) had secured commercial backing for other elements of the scheme but were unable to secure a loan for the hotel as the banks were reluctant to fund this type of use. With the hotel being a key element of the scheme, the City Council stepped in to borrow the money to help progress the hotel. It has lent a large slice of the money that it has borrowed to the developer to fund the construction of the hotel. The Council will use the rest of the money to buy plots of land near the hotel and kick-start work on buildings that will be sold on at commercial rates. The hotel is due to open in July 2015. It will be operated under management contract by the InterContinental Hotels Group (IHG). The hotel will add a major new business conferencing and banqueting facility to the city. Its main conferencing suite will seat and cater for around 400 people. The hotel will also offer eight adaptable meeting rooms that can accommodate small seminars of 12 people up to large private meetings of 32 and delegate meetings of 100. Combining the large conference suites and meeting rooms, the hotel can provide more space to become an ideal venue for exhibitions.

Hilton Ageas Bowl, Hampshire

Eastleigh Borough Council has recently purchased the now completed 175-bedroom, 4 star Hilton hotel at the Ageas Bowl cricket ground near Southampton, home of Hampshire County Cricket Club. In a deal signed in 2012, the Council agreed to pay £27.5m for the completed hotel to enable it to go ahead. Its construction was funded by Omni Capital. The investment has required the Council to take out a loan, which will be repaid with the revenue from the hotel. The Leader of the Borough Council, Cllr Keith House, has consistently said that the surplus income, particularly in the longer-term once the loan has been cleared, will be used to keep Council Tax down.

Lancashire County Cricket Club 4 Star Hotel

The Greater Manchester Combined Authority and Trafford Metropolitan Borough Council have stepped in to help bridge the funding gap for a proposed 150-bedroom 4 star hotel at Lancashire County Cricket Club's Emirates Old Trafford ground after the club failed to secure a bank loan for the project. A meeting of the Combined Authority in February 2015 agreed a loan of £5m towards the £12m hotel from the Greater Manchester Growth and Growing Places Funds, while Trafford Metropolitan Borough Council agreed to a loan of £4m in March. The Cricket Club turned to these public sector bodies after being turned down for funding by its bank. The Club had also rejected an offer of a loan from the Greater Manchester Pension Fund because the level of fees and proposed interest rate of 9% could not be supported by the hotel scheme. Trafford Council will borrow the £4m from the Public Works Loan Board resulting in an annual interest cost of £106,000. The Cricket Club will pay the Council £221,000 over the loan period, leading to a net profit for the Council of £115,000.

Stockport Exchange

Stockport Council is using its prudential borrowing powers to access an £18.5m preferential rate loan to forward fund the construction of a 115-bedroom hotel and 50,000 sq ft office building as the second phase of the Stockport Exchange mixed-use development scheme in Stockport town centre in conjunction with its development partner Muse Developments. The Council bought the 10.4 acre site in January 2011. The first phase of the development, which included highways improvements and a 1,000 space multi-storey car park was completed in 2014. The Council sees the scheme as being crucial to the success of Stockport town centre. It took the decision to use its preferential rates of borrowing to kick start phase 2 and attract further investment at a time when commercial funding has proved difficult to secure. The income generated will cover the cost of the loan. The Council has done extensive research and financial modelling to ensure its financing of the hotel and office development will be at no extra cost to the Council Tax payer.

4. Grants for Hotel Projects

Grants from the European Regional Development Fund (ERDF), UK Government Growing Places Fund and Regional Growth Fund, Welsh Government, Scottish enterprise agencies and individual local authorities have helped to fund a number of hotel schemes across the UK. Heritage Lottery Fund grants have also been secured to support the conversion of a number of historic buildings into hotels. Examples of grant schemes and grant assisted hotel projects are as follows

Welsh Government Tourism Investment Support Scheme (TISS)

The Welsh Government operates a discretionary capital grant scheme, which is available to both existing and new tourism businesses of all sizes (SMEs and large companies) that are looking to undertake capital investment. Support is available for the purpose of upgrading the quality of existing tourism business premises and increasing capacity where there are clear gaps in the market. The scheme has two elements offering grants of up to £75,000 and £500,000. Grants are non-repayable up to £25k, but may be repayable over £25k, subject to appraisal. The guideline intervention rate is 25% but up to 50% can be considered. A wide range of hotel projects have been supported, including a grant of £500k to support the upgrading of the Ruthin Castle Hotel to 4 stars and a £1.1m investment in the St Brides Hotel at Saundersfoot.

Highlands & Islands Enterprise

Highlands & Islands Enterprise offers a range of financial assistance to support capital investment projects, including grants, loans and direct equity investment, and works with Scottish Development International to develop investment propositions to take to market. The agency has funded a number of hotel projects including investments in 2015 of £217,500 to support a £1.4million expansion of the Isle of Eriska Hotel near Oban, and a £200,000 investment to support the expansion of the Kylesku Hotel in the Highlands.

Titanic Hotel, Liverpool

Liverpool City Council provided a £5.5m grant from the Regional Growth Fund to enable developers Harcourt to progress the conversion of the North Warehouse at Stanley Dock in north Liverpool into a 150-suite 4-star hotel at a cost of £30m. The project is part of the first phase of a £130m plan to regenerate the entire Stanley Dock site. The regeneration of north Liverpool is a key priority for the city's Mayor. The City Council decided that investment in the hotel was justified as a statement of confidence in the area, a means of finding a new use for a building that had been derelict for many years, and in terms of the new jobs that it has created. The hotel has also benefitted from BPRA. It opened in June 2014.

Premier Inn Blackburn

A 60-bedroom Premier Inn budget hotel is currently under construction as part of the £25 million Blackburn Cathedral Quarter development in Blackburn town centre, Lancashire. The scheme also includes an office block, restaurants, shops, a new bus interchange and housing for Cathedral staff. It has been funded by the Homes and Communities Agency (£4.75m), European Regional Development Fund (£3.6m), Blackburn with Darwen Council (£3.8m), Blackburn Cathedral (£1.7m), Lancashire LEP's Growing Places Fund (£3.9m) and commercial developer Maple Grove (£7.8m). The hotel has been let to Premier Inn. It is due to open in November 2015.

Hampton by Hilton Humberside Airport

North Lincolnshire Council is part funding the development of a £7m, 103-bedroom Hampton by Hilton hotel at Humberside Airport through a Regional Growth Fund grant. The hotel is being developed by regional hotel operator Nightel, who will operate it under a franchise agreement with Hilton Worldwide. It is due to open in mid-2016. The Council has supported the development of the hotel on the basis of the contribution it will make to the development of the airport, the continuing expansion of the offshore oil, gas and renewable energy sectors and the new jobs that it will create.

Belfast Titanic Hotel

The derelict office building in which RMS Titanic was designed is to be developed into an 84-bedroom 4 star hotel thanks to a £4.9m grant from the Heritage Lottery Fund. The Titanic Foundation will use the grant to restore the B+ listed Harland and Wolff headquarters building on Queen's Island, Belfast, which has been vacant since 1989. The grant has been awarded through HLF's Heritage Enterprise programme. It is designed to help when the cost of repairing an historic building is so high that restoration is not commercially viable. Grants of £100k to £5million bridge the financial gap, funding the vital repairs and conservation work needed to convert derelict, vacant buildings into new, usable commercial spaces that can have a positive impact on local economies.

Buxton Crescent Hotel

The £46m redevelopment of the former St Ann's Hotel in Buxton's Grade I listed Georgian Crescent into a 79-bedroom, 5 star hotel incorporating the neighbouring natural baths into a state-of-the-art thermal natural mineral water spa, is currently being progressed with funding support from a variety of public sector sources, including the Heritage Lottery Fund (£23.8m), English Heritage (£0.5m), Derbyshire County Council (£2.7m), High Peak Borough Council (£2m) and D2N2 LEP (£2m). The developers, the Trevor Osborne Property Group, are contributing £15m. The project first commenced 10 years ago, but stalled after £5m of funding from the East Midlands Development Agency (EMDA) was withdrawn with the demise of the agency in 2011. The delay caused by losing the EMDA funding meant that because of the financial climate at the time the developers were unable to borrow the amount that they needed from the banks. Given the importance of the project to Buxton and the rest of Derbyshire the County Council stepped in with a loan to help bridge the funding gap. Further funding was also secured from the D2N2 LEP and HLF awarded an additional £11.3 m for the completion of the project in November 2014. Construction has now restarted with the hotel due to open in 2016. It is projected to generate an additional annual contribution of £4m into Buxton's visitor economy.

5. Local Authority Freehold Purchase

Aloft Liverpool

Liverpool City Council facilitated the conversion of the historic Royal Insurance building in Liverpool city centre into a 116-bedroom Aloft budget boutique hotel by purchasing the freehold of the building for £1.95 million. This unlocked £18million of private sector investment in the project, which has been progressed by Runcorn-based developer Ashall Property. The City Council was keen to bring this landmark building back into use. It had been unoccupied for 20 years and was on the National Buildings at Risk Register. English Heritage also supported the scheme with a grant of £297,500. The hotel opened in November 2014. It is operated by BDL Management under a franchise agreement with Starwood Hotels & Resorts Worldwide.