EB608

EPPING FOREST DISTRICT
VISITOR ACCOMMODATION NEEDS ASSESSMENT

Phase 1 Report

Prepared for
Epping Forest District Council

August 2016

hotel solutions
the hotel development consultancy

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1 INTRODUCTION

1.1 The Purpose of the Study

Hotel Solutions has been commissioned by Epping Forest District Council to undertake a Visitor Accommodation Needs Assessment. The purposes of the study are:

- To provide a clear understanding of the future potential for hotel and visitor accommodation development in Epping Forest District
- To inform planning policy for visitor accommodation development as part of the new Local Plan – including draft policy wording for the Consultation Draft (as the key output from Phase 1 in August 2016)
- To advise on other roles that Epping Forest District Council can play to accelerate hotel and visitor accommodation development in the District.

1.2 Phase 1 Approach & Work Modules

The first phase of this study has taken place in August 2016, to tie in with the timeline for producing the Local Plan Consultation Draft, with the work informing the draft visitor accommodation policy. To do so, the following modules of work have been completed:

- An audit of current visitor accommodation supply;
- A review of past and current proposals for visitor accommodation;
- A review of national trends in hotel and visitor accommodation development;
- Consultations with Lee Valley Regional Park Authority, Vibrant Partnerships and City of London (Epping Forest);
- Consultation workshops with District Council Officers and Members;
- A review of examples of tourist accommodation planning policies.

This report summarises the above research and analysis and provides part of the evidence base for the draft Visitor Economy policy in the new Local Plan.

2 CURRENT VISITOR ACCOMMODATION SUPPLY, RECENT CHANGES & PROPOSALS

2.1 Current Visitor Accommodation Supply in Epping Forest District

Our research has identified a total of 40 commercial visitor accommodation businesses and 41 airbnb[1] listings in Epping Forest District, with an estimated total of 3,786 letting bedspaces. This supply is analysed by type of accommodation in the table below. A full listing of all of the accommodation establishments in the District is provided at Appendix 2. In addition to this land-based accommodation supply, Roydon Marina has 315 berths for canal boats and cruisers. We do not yet know how many of these berths are used for permanent moorings, so are unable to say how many berths might be considered as part of the District's visitor accommodation supply.

Table 1
EPPING FOREST DISTRICT VISITOR ACCOMMODATION SUPPLY – AUGUST 2016

Type of Accommodation	Total Estabs	Total Bedrooms/ Units/ Pitches	Total Bedspaces	% of Bedspaces
Hotels	9	543	1086	28.7
Inns	7	62	124	3.3
Restaurants with Rooms	0	0	0	0
Guest Houses/ B&Bs	3	11	22	0.6
airbnb	41	41	74	1.9
Self-Catering	9	11	57	1.5
Holiday Lodge Parks	1	66	264	6.9
Caravan & Camping Sites	4	406	1624	42.9
Glamping Sites	0	0	0	0
Camping Pod sites	0	0	0	0
Holiday parks	0	0	0	0
Residential Conference Centres	1	35	70	1.9
Wedding Venues with Accommodation	1	7	14	0.4
Spa Resorts/ Health Farms	0	0	0	0
Youth Hostels	0	0	0	0
Bunkhouse Barns	0	0	0	0
Outdoor Activity/Education Centres	3	n/a	341	9.0
Other	2	n/a	110	2.9
TOTAL	**81**		**3786**	**100**

[1] airbnb is an online platform that allows people to rent out rooms in their homes for short stays

Epping Forest District has a relatively small supply of visitor accommodation at present. It has one major 4 star hotel at Waltham Abbey (the Marriott Waltham Abbey), and budget hotels at Waltham Abbey, Buckhurst Hill and Chigwell. Epping has two low quality hotels – the Bell Hotel and Thatched House Hotel. The District has three other hotels: the Phoenix Epping Hotel at North Weald (formerly a Travelodge), which judging by its Tripadvisor reviews seems to offer low quality accommodation; Mulberry House at Chipping Ongar; and the Roydon Marina Village Hotel. There are a number of significant hotels just outside the District in Harlow, Cheshunt, Woodford Bridge and Hatfield Heath.

Other than hotels, the District has a number of rural pubs that offer accommodation. This accommodation appears to be of a good quality, and includes a boutique inn (The Blue Boar at Abridge). The District has very little in terms of B&B accommodation, and a number of B&Bs have recently closed. The number of people offering rooms to let through the airbnb home sharing website has however increased significantly. The District also has very little in terms of self-catering accommodation. It has one large caravan and camping site (Lee Valley Campsite at Sewardstone), and a large campsite (Debden House Campsite at Loughton) and two certificated caravan and camping sites. There are two large caravan and camping sites in other parts of the Lee Valley Regional Park, and a large Camping and Caravanning Club site at Kelvedon Hatch. Roydon Marina Village is a major accommodation site in the District, with a marina, holiday lodges and the hotel. There are two activity centres with accommodation in the south of the District operated by the Scout Association and Girlguiding UK; and outdoor education centre (Lambourne End); a religious retreat and events centre (Woodland Camp at Lambourne); and a respite holiday centre for disabled people at Chigwell (Jubilee Lodge).

2.2 Recent Changes in Visitor Accommodation Supply

a) New Establishments

The only addition to the District's visitor accommodation supply since 2009 has been the opening of new accommodation for wedding parties at the Blake Hall wedding venue at Ongar.

b) Changes to Existing Establishments

Changes to existing accommodation establishments in the District since 2009 have been as follows:

- Lee Valley Campsite at Sewardstone has added 42 touring caravan pitches and 10 camping pods;
- Roydon Marina Village has replaced 82 static caravans with 53 log cabins;
- Travelodge has ceased operating the Harlow North Weald Travelodge: the hotel is now operated independently as the Phoenix Epping Hotel;
- The Chigwell Innkeeper's Lodge has been rebranded as the Travelodge Chigwell.

c) Closures

The following visitor accommodation businesses in the District have closed since 2009:

- Thatched House Hotel, Epping (13 bedrooms) – although the hotel is still open, it is understood to be primarily providing emergency accommodation for homeless people;
- Railway Hotel, Sawbridgeworth (12 bedrooms) – currently being converted to residential apartments;
- The Elms Caravan Park, High Beech (30 pitches) – absorbed into the adjacent residential park homes site.

In addition, the Epping Forest Youth Hostel closed in 2008, as the YHA was unable to negotiate a new lease with the landlord.

In the surrounding area, the Churchgate Hotel at Harlow closed in 2014. The Briggens House country house hotel at Stanstead Abbotts in Hertfordshire closed in 2006, and has not since reopened.

2.3. Comparisons with Other Districts

We have provided at Appendix 3 visitor accommodation supply tables for two districts in the South East where we have recently completed hotel and visitor needs accommodation assessments – Horsham District in West Sussex and Sevenoaks District in Kent. Both districts have similar restrictions to Epping Forest District in terms of landscape designations: 93% of Sevenoaks District is designated Green Belt, while the southern part of Horsham District lies within the South Downs National Park. While there are differences between the two districts and Epping Forest District, we make the following broad observations:

- Epping Forest District has over twice as much visitor accommodation as Sevenoaks District. This is largely due to the two large caravan and camping sites that Epping Forest District has – Sevenoaks District only has a few small certificated caravan and camping sites.

- Epping Forest District has a significantly smaller supply of accommodation than Horsham District. This is largely due to the three large holiday parks in Horsham District and the greater self-catering supply here. None of Horsham District is in the Green Belt.

- Compared to these two other districts, Epping Forest District has a deficiency of B&B and self-catering accommodation, and a lack of any glamping provision. It has a similar hotel supply to Horsham District and a greater number of hotel rooms than Sevenoaks District.

We have provided in the table below comparative data on the current hotel supply in neighbouring and other Essex districts. Epping Forest District has the highest number of hotel bedrooms compared to these districts.

Table 2
EPPING FOREST DISTRICT – HOTEL SUPPLY COMPARISONS[2]

District	Hotel Bedrooms
Epping Forest	544
Broxbourne	363
Harlow	467
Brentwood	422
Chelmsford	515
Basildon	505

2.4 Proposals for Visitor Accommodation

A trawl of planning applications demonstrates interest and activity in terms of proposed visitor accommodation development across the District. The table at Appendix 4 summarises these schemes, alongside further intelligence that we have picked up through our consultations.

In overview:

- There have been some proposals of scale, most notably the PGL children's activity holiday centre proposal for Royal Gunpowder Mills (900 bedspaces), and a 240 berth extension to Roydon Marina.
- There is a proposal for a new hotel at Waltham Abbey, and plans have been approved for a 34-bedroom extension to the Waltham Abbey Premier Inn. The other hotel proposal in the District is the planned redevelopment and upgrading of Mulberry House at High Ongar.
- Smaller scale proposals include bedroom extensions to pubs (up to 10 rooms), small scale caravan and camping site applications (15+ pitches), interest in camping pods, and redevelopment (up-grading and expansion) of an existing hotel (up to 25 rooms).

[2] We have not included a comparison with Uttlesford as the significant hotel supply at Stansted Airport distorts the district's hotel supply, making comparison invalid.

Some schemes have been refused – the most notable one recently being the PGL scheme. The grounds quoted have included the scale of new build development in the Green Belt being inappropriate, harm to heritage assets, and failure to demonstrate need.

In addition to these proposals, other potential schemes that could come forward include:

- A number of sites where hotel use is being considered, usually as part of a mixed use scheme. These include the Civic Offices in Epping, the St John's Road site in Epping, North Weald Airfield, and bordering Epping Forest District, the GSK site in Harlow (associated with the potential PHE relocation), and Harlow Enterprise Zone;
- There is known hotel operator interest in Epping, Waltham Abbey and Buckhurst Hill from Premier Inn and Travelodge, both of which have these towns on their active site acquisition target lists;
- The Lee Valley Regional Park Development Framework identifies the development of visitor accommodation as a key requirement for developing the Park as a destination for outdoor sport and recreation, and identifies a number of sites as being suitable for accommodation development, both within and bordering Epping Forest District, including the Lee Valley White Water Centre, Lee Valley Country Park, Dobbs Weir, Picketts Lock, Lee Valley Campsite, Royal Gunpowder Mills and Roydon Marina Village.

There are a number of hotel proposals in the areas that immediately surround Epping Forest District. They include:

- A proposed 46-bedroom Premier Inn adjacent to the Potter's Arms Brewer's Fayre pub restaurant at Church Langley in Harlow. A planning application was submitted in August 2016;
- The conversion of the Grade II listed Broxbournebury Manor at the Hertfordshire Golf & Country Club at Broxbourne into a 95-bedroom luxury hotel. Planning permission was granted in 2011;

- Proposals for a major mixed-use development on land to the west of Hoddesdon that were granted outline planning permission in 2014 include a hotel with a gym and restaurant;
- Broxbourne Borough Council's Development Options document (April 2016) identifies potential for a hotel as part of the proposed development of the 347-acre Brookfield Area.

3 THE NEED FOR VISITOR ACCOMMODATION DEVELOPMENT

The Brief for this Visitor Accommodation Needs Assessment set out the Council's ambition to develop the District's visitor economy, drawing on the 'green and unique' character of the District, through a different approach to planning policy in the new Local Plan and broader pro-activity by the local authority and partners locally. Additional visitor accommodation is needed to increase the number of staying visitors, which are currently dwarfed by the volume of day visitors attracted to the District. The Draft Economic Development Objectives formulated from Member workshops (November 2014) includes tourism as one of 6 priorities, identifying the need to increase and expand the visitor economy through promotion and the provision of new guest accommodation.

Whilst the need for visitor accommodation development identified here is as a key strand to deliver economic benefits, a number of wider needs were identified through our consultations and workshops with Officers and Members. These include:

- Economic benefits around the enhanced value/spending of staying visitors;
- The need to develop the rural economy, help sustain village and rural businesses, and encourage farm diversification;
- Developing the evening economy in the District's towns, creating vitality and spending on food, drink and entertainment;
- The need to serve the business community, primarily in terms of hotel accommodation to allow companies to do business effectively, cater for their business visitors, and provide facilities for meetings and conferences;
- Supporting the sustainability of existing businesses, enabling them to attract new markets and improve their viability;
- Creating employment;
- Delivering improved facilities for the local community, and helping support local facilities such as rural pubs;
- Developing the Lee Valley Regional Park as a destination, increasing length of stay and enabling new markets to be attracted.

4 CURRENT & POTENTIAL FUTURE DEMAND FOR VISITOR ACCOMMODATION IN EPPING FOREST DISTRICT

4.1. Current Markets for Visitor Accommodation

While the Phase 1 work has not included any detailed research to understand the key markets that are currently using hotel and visitor accommodation in Epping Forest District, the research that we undertook in 2009 to assess the District's hotel market (as part of the Essex Hotel Futures research programme), and the anecdotal evidence that we have picked up through the Phase 1 consultations suggest the following as the key markets for accommodation in the District:

- Business visitors using the District's hotels in the week;
- Contract workers staying in hotels and pub accommodation during the week;
- People attending weddings and family events;
- People visiting friends and family;
- Leisure tourists using the District as a base for visiting London;
- People taking part in outdoor sports and recreation, particularly in the Lee Valley Regional Park;
- Those escaping from London for a rural break, particularly at the weekend.

4.2. National Leisure Tourism Demand Trends & Forecasts

4.2.1. Appendix 5 provides a summary of national tourism market trends and forecasts. Key trends of relevance to hotel and visitor accommodation development in Epping Forest District are as follows:

- The continued growth in demand for domestic short breaks from the emptynester, family and Generation Y markets[3];
- The growth in leisure trips linked to visits to friends and relatives;
- The increasing interest in outdoor activity holidays and breaks;
- The growth in intergenerational family holidays and breaks;
- The trend for families and friends to get together for celebration weekends, reunions and weekends away;
- The continued growth in inbound tourism to the UK;
- The growing market requirement for high quality, distinctive and contemporary accommodation;
- The increasing importance of online marketing and booking channels and social media for short break decision making and planning, enabling accommodation businesses to reach customers much more cost effectively than they have ever been able to before.

4.3. Prospects for Future Growth in Accommodation Demand

From our initial assessments, all of the current markets for hotel and visitor accommodation in Epping Forest District look set to grow as:

- The local economy develops, boosting business demand for accommodation;
- The population increases in the District and surrounding area, generating increased demand from people attending weddings and family occasions, and those visiting friends and relatives;
- The District's visitor attraction and outdoor sport and recreation offer develops, providing new reasons for leisure tourist stays;
- The domestic leisure break market grows;
- Inbound tourism to the UK increases.

[3] Also known as the Millennial Generation – people born in the 1980s/1990s who are now in their 20s and 30s

5. VISITOR ACCOMMODATION DEVELOPMENT OPPORTUNITIES

5.1 Market Opportunities for Visitor Accommodation Development by Type

Our analysis of the District's current hotel and visitor accommodation supply; national accommodation development trends of relevance to Epping Forest District (see Appendix 6); the potential for future growth in demand for accommodation in the District, and what will drive this; and knowledge of current hotel and visitor accommodation developer interest in the District, suggests the following potential market opportunities for hotel and visitor accommodation development in Epping Forest District:

- The improvement of existing low quality hotels;
- Potential for budget hotels in the District's key towns and those parts of the District that border London – Epping (a target for Premier Inn and Travelodge), Waltham Abbey (a target for Travelodge), Buckhurst Hill (a target for Travelodge), Loughton, Chigwell and Debden;
- New-build pub restaurants with lodge accommodation (typically 30-40 bedrooms);
- Boutique hotels in Epping and Chipping Ongar, given suitable properties for conversion.
- Luxury and/or boutique country house hotels, given suitable properties for conversion. This could require some new-build extensions to achieve a viable hotel;
- Hotels on golf courses, possibly through the conversion of existing buildings, but probably involving new-build hotel bedrooms and facilities;
- Pub accommodation in towns, villages and rural locations. This may require new-build bedroom extensions;
- Restaurants with rooms;
- Accommodation at wedding and events venues, perhaps requiring new-build extensions;
- B&Bs;

- Holiday lets in terms of the letting of residential properties and barn conversions;
- Holiday lodge parks and eco lodge parks, with lodges for rental and/or outright or timeshare ownership, particularly in the Lee Valley Regional Park, and potentially also in the rural parts of the District, give suitable sites that can achieve planning permission;
- Golf lodges on golf courses;
- Fishing lodges around fishing lakes:
- Watersports holiday parks around watersports lakes, potentially in the Lee Valley Regional Park;
- Treehouses;
- The enhancement and possible expansion of existing touring caravan and camping sites;
- The development of new touring caravan and camping sites;
- Eco camping;
- Glamping sites;
- Camping pod developments;
- Tree camping;
- The development of existing group and youth accommodation – Woodland Camp, Lambourne End, Gilwell Park Scout Activity Centre, Chigwell Row Camping & Activity Centre;
- New group and youth accommodation – hostels, bunkhouses, outdoor activity centres with accommodation;
- Children's activity holiday centres – along the lines of the recently refused PGL proposal at Royal Gunpowder Mills;
- Wellness retreats and spas with accommodation.

5.2 Key Locations of Opportunity

Our initial assessment suggests that there are two key locations of opportunity for accommodation development in Epping Forest District – Lee Valley Regional Park and the area around Epping Forest as areas for outdoor sport and recreation. One of the strategic aims of the Lee Valley Regional Park Development Framework is to develop the Park as a high quality and regionally unique visitor destination. Developing the Park's accommodation offer is seen as an important part of achieving this aim. The Park Authority would like to develop accommodation in a number of locations, with each providing a mix of different types of accommodation, including hotels, hostels, holiday villages, touring caravan and camping sites, mobile home parks and recreational moorings. Key sites within or bordering Epping Forest District that are identified in the Park Development Framework as offering potential for accommodation development are the Lee Valley Campsite at Sewardstone (for expansion and enhancement); Lee Valley Country Park; Royal Gunpowder Mills; Lee Valley White Water Centre; Waltham Abbey and Roydon Marina Village.

The other possible location of opportunity for accommodation is around Epping Forest, where accommodation development could play a role in developing the Forest as a destination for outdoor recreation, and generating an income stream to support Forest management. While the many protections and restrictions on development in the Forest limit the potential for accommodation in the Forest itself, there could be opportunities for accommodation development in the buffer lands and other areas immediately adjacent to the Forest. There are a number of types of accommodation that we think could be considered here, including holiday lodges, touring caravan and camping sites, camping pods, treehouses, tree camping and glamping.

6 BARRIERS TO ACCOMMODATION DEVELOPMENT IN EPPING FOREST DISTRICT

6.1 Barriers to the Development of Visitor Accommodation

We have identified four key barriers to realising the opportunities for visitor accommodation development in Epping Forest District:

- Green Belt policy clearly imposes significant restrictions on the potential for accommodation development in the District's rural areas, particularly in terms of new-build accommodation development and accommodation developments of any scale.
- Landscape, conservation and scientific designations in Epping Forest, as well as the requirement under the governing Act of Parliament to safeguard the Forest for public access, restrict the potential for accommodation development in the Forest.
- The availability of suitable and affordable sites for hotel development in Epping, Waltham Abbey, Buckhurst Hill, Loughton, Chigwell and Debden is a significant barrier to realising the potential for budget hotel development in these locations. Hotels are likely to get squeezed out of suitable sites by higher value uses, in particular residential.
- The poor quality of some of the District's hotels is preventing them from generating enough profit to invest in upgrading. Current owners have not invested for many years.

6.2 The Implications of These Findings

The research has identified market potential for a wide range of different visitor accommodation offers, some key areas of opportunity with aspiration and interest in developing visitor accommodation, and a need for new visitor accommodation to be delivered to grow staying tourism and meet economic, employment, social, community and environmental objectives of EFDC and its partners. However, there are clearly significant challenges to delivering new visitor accommodation, which planning policy can play a role in helping to address, along with other interventions.

7 CURRENT POLICY STRATEGY & RESEARCH HEADLINES

The Phase 1 work has involved reviewing a wide range of current policy, strategy and research documents, together with outputs of meetings, workshops and consultations, a number of which have been part of the process of building up an evidence base for the Local Plan and engaging stakeholders in the process. This has included:

- Economic Impact of Tourism (Destination Research, 2014)
- Economic and Employment Evidence to Support the Local Plan and Economic Development Strategy (Hardisty Jones, September 2015)
- Lee Valley White Water Centre Economic Development Study 2011
- Lee Valley Park Development Framework – Thematic Proposals (Lee Valley Regional Park Authority January 2011)
- Lee Valley Regional Park Development Framework Area 5 Proposals (adopted April 2013)
- Tourism: Jobs and Growth – The Economic Contribution of the Tourism Economy in the UK (Deloiitte November 2013)
- Epping Forest Hotel Investment Fact Sheets (Visit Essex January 2010)
- NPPF (2012)
- Epping Forest District Adopted Local Plan (1998) and 2006 Alterations
- Visit Epping Forest Tourism Conference 2015 presentation
- St John's Rd Epping Design & Development Brief (2012)
- Lee Valley Visitor Economy Stakeholder Workshop (2015) notes
- Consultations with Lee Valley Regional Park Authority, Vibrant Partnerships, City of London (Epping Forest), EFDC Officers, EFDC Members.

Some of the headlines emerging from our analysis of these documents and discussions that are of relevance to future policy for visitor accommodation development are summarised below, grouped thematically:

Planning Policy & Its Implementation

- The NPPF Green Belt policy can be seen as restrictive or as presenting 'hooks' onto which visitor accommodation proposals could be attached; there is the opportunity to interpret the NPPF guidance positively to support appropriate accommodation development if the Council wishes to.
- Permissions have been granted in Green Belt in the past, but a new policy that is generically positive and indicating that the Council is keen to see the development of visitor accommodation would help open the door to approving appropriate schemes.
- Greater transparency around appropriateness, very special circumstances and measuring/balancing harm would be helpful and ensure consistency of approach. The recent refusal of the PGL scheme is a case in point, which Officers felt met the requirements and Members did not e.g. reference to 30% new build being disproportionate.
- Greater transparency around need and how to demonstrate this would also be helpful – this was cited in relation to the Mossford Green Nursery application.
- The professional advisors to the White Water Centre concluded that local authority planning policies whilst broadly supportive were not adequate to actively promote the type and scale of development envisaged.
- There is concern around the potential for developers to use visitor accommodation as a route to secure permission for permanent residential accommodation and doubts over the effectiveness of planning and legal tools to prevent this.

Tourism Strategy & Potential

- EFDC has identified the visitor economy as a priority, as one of 6 economic development objectives for the Local Plan, that seeks to increase and expand the visitor economy through promotion and the provision of new guest accommodation.
- There is no Tourism Strategy or Destination Management Plan for the District or wider destination partnership area (Lee Valley/Epping Forest). This means there is a lack of clarity about unique selling propositions, target markets and their requirements to inform the Local Plan Visitor Economy policies.
- Economic impact research provides some understanding of the dimensions and characteristics of visitors, most notably that:
    - Day visitors dominate at 3.2m compared to 169,000 staying visitors;
    - Only half of staying visitors use commercial accommodation;
    - People staying with friends and relations account for 50% of staying visitor trips and 65% of nights;
    - Within paid accommodation, serviced accommodation accounts for the biggest number of nights (36%) followed by camping at 5%;
    - Business visits, the mainstay of the hotel market in the District, make up only 17% of trips and 12% of nights.
- The Hardisty Jones study identified the need for 150 bedspaces over the Local Plan period. This was not based on any market work, and appears to have been worked back from an employment forecast. We would question the validity of this figure therefore.

Site Availability and Deliverability

- Whilst there are sites that are being considered for hotel use, including Council owned sites, there is clearly a tension over the need or desire to achieve best value and maximum return, with residential beating the likely value that hotels can deliver by a significant margin. There are already signs that hotel use will be squeezed out of these sites.
- The fact that the potential for hotel development in some of the District's key towns that was identified in 2009 has not been delivered, despite active interest from budget hotel companies, is likely to be a reflection of the shortage of sites, high land values and pressure from other uses.
- Restrictions on new build development and enclosing land in Epping Forest mean that accommodation development is unlikely in the Forest itself, other than potentially in terms of the re-use of redundant buildings, and perhaps some small-scale, low impact types of accommodation, such as eco camping, eco pods, tree camping or glamping.

8 LESSONS FROM POLICY APPROACHES ELSEWHERE

We have undertaken a review of the planning policies for visitor accommodation of other local authorities to see what lessons can be learned from their approaches. In selecting those to examine we were mindful to focus on areas with sensitive landscapes and therefore associated constraints, such as National Parks, and also authorities just outside major metropolitan areas and cities with Green Belt designations. We have also revisited the planning policies of some of the Councils we have worked with on hotel and visitor accommodation studies to see how they have used the evidence that we have produced for them in their plan and policy making. Finally, we have looked at neighbouring authority policies – notably Broxbourne, to see how they have treated the Lee Valley Regional Park.

The table overleaf provides some headline comments in each case. We provide a summary of key messages below:

- A variety of approaches have been adopted, from one very simplified visitor accommodation policy to 4+ policies, including separate policies for different types of accommodation.
- The policies are at different stages in the Plan-making process – consultation, preferred options, adopted – and a mix of Core Strategies, Development Management policies and new/old Local Plan documents, and therefore they have more or less supporting text and detail accordingly.
- Given that NPPF only came into force in 2012, this is all quite new and evolving, from the early post 2012 policies that will have been in process for some time before NPPF came in.
- In some cases, visitor accommodation was covered by a separate policy, in others it was part of a broader visitor economy policy with sub-points.
- In some cases policies are supported by an SPD/SPG to provide more detailed guidance.

- Some policies are also supported with area policies for key locations;
- Several include an accommodation retention policy, sometimes for hotels/visitor accommodation, sometimes generally for visitor facilities;
- Only one authority (Rother District Council in East Sussex) gave the full flavour of what there was potential for, referencing our work and listing the types of accommodation that we identified market potential for.
- In the case of Broxbourne, their policies cover some sites such as the Lee Valley White Water Centre that are split between the two authorities. It will clearly be helpful to have some consistency around this from both authorities.
- A number of policies included criteria for visitor accommodation development, including :
    - Positive criteria in terms of the scheme bringing benefits such as creating employment, supporting the local/rural economy;
    - Criteria that seek to minimise negative impacts e.g. around access, visual appearance;
    - Criteria that reflect local issues or priorities e.g. supporting visits to the coast, sport and active use of the countryside, the development of a heritage city as an international destination.
- In many cases, the policy had been informed by a visitor survey and a visitor economy/destination development strategy, so that there was clarity around what the Council was trying to achieve in terms of tourism development, target markets etc., which the Local Plan is then creating the development framework to deliver.

LOCAL PLAN VISITOR ACCOMMODATION POLICIES

LOCAL AUTHORITY	DOCUMENT TITLE/DATE	POLICY SUMMARY – KEY FEATURES	ADDITIONAL INFORMATION
Brecon Beacons National Park Authority	Brecon Beacons NPA Local Plan 2007-2022, Adopted (Dec 2013)	**SP14 Sustainable Tourism** • One strategic policy – enable proposals for sustainable tourism development that promote enjoyment and understanding of the National Park and ensures conservation and enhancement of its natural beauty and heritage • Text cites the sustainable tourism strategy and how the Local Plan can contribute to the delivery of this and the Park Management Plan Section on holiday accommodation that sets out objectives in terms of supporting the local economy, with key considerations around mitigating impacts. Four visitor accommodation policies **Policy 45 New Buildings for Holiday Accommodation** • Only in settlements or on non-allocated sites (hotels, hostels, guest houses) **Policy 46 Non-permanent Holiday Accommodation** • Permitted in exceptional circumstances where integrates with the landscape; onsite facilities are in converted buildings; there are no permanent residents; and access is adequate • Refers to caravans, chalets, glamping, that can be removed with no permanent trace on the landscape. This policy is supported by an SPG on Low Impact Tourist Accommodation.	

		Policy 47 New or Extended Sites for Touring Caravans Camper Vans and Tents • Only to be permitted where seasonal conditions apply, no permanent residents, integrated with the landscape visually, on-site facilities through building conversion. **Policy 48 Outdoor Activity Centres** • New centres or extensions permitted where within a settlement; utilising an existing building; not extending beyond the building curtilage; or in the countryside having no significant detrimental impact on landscape and proving the need for a countryside location.	
Broxbourne Borough Council	Regulation 18 Draft Local Plan Consultation Document (July 2016)	**Policy ED3: Visitor Infrastructure and Attractions** • Three parts to the policy, the second welcomes hotel development. • The other two generally support proposals for new attractions/facilities and identify specific sites – Lee Valley White Water Centre (adrenalin hub), Broxbourne Leisure Pool, Spitalbrook. **Policy LV1: Lee Valley Regional Park** • Supports the LVRPA in the continuing improvement of the Park • Text says the Council is supportive of the majority of the proposals in the Park Development Framework and that the Local Plan contains policies to make provision for the key proposals. **Policy LV2: Lee Valley White Water Centre** • Supports the development of an adrenalin hub at LVWWC Three other Lee Valley policies, LV3,4 5 – policies re the development of other sites	

Cheshire West & Chester Council	Local Plan (Part One) Strategic Policies, Adopted (Jan 2015)	**Econ 3 Visitor Economy** • General support for expanding existing tourism assets and creating new where enhances tourism offer, benefits the local community, and suitable in scale and type for the location. • Directs major development to key centres or in countryside where scale and type protects the countryside • Criteria plus Green Belt controls in terms of enhancing the role of Chester as an international visitor destination; supporting the vitality of towns by growing visitor numbers; bringing regeneration benefits especially on brownfield land; providing sustainable access/close to attractions; improving access to rights of way, waterways and green infrastructure; supporting farm diversification. • Caravan and camping sites supported where an unmet need, small in scale and utilising existing rural buildings.	Part Two Land Allocations & Detailed Policies – Preferred Approach Consultation Aug/Sep
Rother District Council	Rother Local Plan Core Strategy, Adopted (Sep 2014)	**Policy EC6: Tourism Activities and Facilities** • One policy that is generally permissive of proposals subject to 7 criteria: enhancing accommodation to meet customer expectations; supporting active use along the coast; developing markets for local produce/cultural assets; no loss of accommodation; increasing supply; occupancy is restricted to holiday use • The text lists the particular opportunities by type of visitor accommodation (from Hotel Solutions study) • Text also refers to tourism strategy/target markets	Allocations & Development Management Plan to follow (2016 consultation)

Sevenoaks District Council	Allocations & Development Management Plan, Adopted (Feb 2015)	**Policy LY1 – Tourist Accommodation and Visitor Attractions** • One simple policy that recognises the benefits to the local economy of tourism proposals • Includes a policy to protect tourist accommodation and attractions from change of use unless it can be demonstrated the use is not viable or is inappropriately sited.	
South Downs National Park Authority	South Downs NPA Local Plan Preferred Options (Sep 2015)	**Strategic Policy SD20: Sustainable Tourism and the Visitor Economy** Five sections to the policy. • An overall generally permissive policy subject to 5 criteria (design, impact, using existing buildings, levels of activity, increasing enjoyment) plus in the countryside must demonstrate need for that location, appropriate scale, sustainable access, associated with other tourism infrastructure. • A retention sub-policy, subject to marketing and viability tests • Support for relocating/redeveloping accommodation harming the National Park • Support for a year round visitor economy – relax seasonal restrictions but protect occupancy • Refusal of schemes with unacceptable adverse impact • Text details research and related policy – economic impact results, visitor survey, visitor accommodation review, and sustainable tourism strategy.	

Wiltshire Council	Core Strategy, Adopted (Jan 2016)	Two Core Policies **Core Policy 39: Tourist development** • Covers attractions and accommodation, in towns and outside main settlements, around sequential test. • Criteria for development outside settlements, relating to being associated with a countryside attraction; no alternatives; compatible scale and design; adequate access and infrastructure • Extensions of appropriate scale and to help business viability • Proposals for camping and touring caravan sites supported where no adverse impact **Core Policy 40: Hotels, bed and breakfasts, guest houses and conference facilities** • Support for new and extensions subject to criteria in terms of location within settlements; outside settlements where conserves a historic building; no detrimental impact on town centre vitality; no unacceptable traffic • Change of use resisted – demonstrate no longer a need in current use or alternative tourism/cultural use.	

9 POTENTIAL PLANNING POLICY APPROACHES

9.1 Emerging Issues

The various strands of research in Phase 1 have raised a number of issues that need to be considered in formulating a visitor accommodation policy for Epping Forest District. Dependent upon the Council's relative priorities, they could require different policy approaches. We discuss these below.

9.2 Potential Planning Policy Approaches

a) The Need for Criteria for Hotel Development in Settlements

NPPF defines hotels as a town centre use and requires the application of a sequential test for non-town centre hotel applications. EFDC will need to consider whether this is enough to manage or facilitate hotel development in the District's towns, or whether any other criteria might be needed.

b) Criteria for Accommodation Development in the Green Belt

Green Belt restrictions suggest that the potential for accommodation development is likely to be limited to small-scale developments that make use of existing buildings or building footprints. Para 81 states that local planning authorities should plan positively to enhance the beneficial use of the Green Belt, including looking at opportunities to provide for outdoor sport and recreation. Para 89 states that local authorities should regard the construction of new buildings as inappropriate in the Green Belt, unless they:

- Are buildings for agriculture and forestry, outdoor sport and recreation;
- Involve the proportionate extension or alteration of an existing building;
- Replace an existing building in the same use;
- Involve the partial or complete redevelopment of previously developed (brownfield) sites, without a greater impact on the openness of the Green Belt.

These criteria could potentially permit many of the types of accommodation development that we have identified potential for in Epping Forest District, depending on how they are interpreted. The Council might want to consider whether it is helpful to identify the types of accommodation that could potentially meet these criteria in a visitor accommodation policy in the Local Plan, or the supporting text to it.

We understand that one of the Council's objectives for increasing the District's visitor accommodation supply is to do with developing the rural economy. Many of the accommodation development opportunities that we have identified e.g. glamping sites; touring caravan and camping sites; camping pods; accommodation at golf courses, fishing lakes and wedding venues; holiday lodge parks; holiday cottage barn conversions, would certainly help to do this, and would help to ensure a sustainable future for established rural leisure businesses and farms. In considering the scope to support such accommodation developments and the policy response this would require, options could include identifying these types of accommodation in the visitor accommodation policy, or the supporting text, or including specific criteria for such accommodation, possibly relating to why the Council wants to support visitor accommodation development and the benefits it can bring, to be used in the test for 'very special circumstances'.

c) The Need to Allocate Sites for Hotels and Major Accommodation Development Schemes

The work that we undertook in 2009 to assess hotel development opportunities in Essex identified market potential for, and hotel company interest in budget hotel development in Epping, Waltham Abbey, Buckhurst Hill, Loughton, Chigwell and Debden, and from our initial assessment these opportunities still exist in 2016. We think it likely that it is the lack of suitable hotel sites that has so far prevented the market from capitalising on these opportunities. Going forward this situation looks likely to continue. Consideration should therefore be given to the need to allocate hotel sites in the new Local Plan, and if so which sites and the evidence needed to justify any allocation.

Para 23 of NPPF states that local authorities should allocate a range of suitable sites to meet the scale and type of tourism development needed in town centres, to ensure that the needs for main town centre needs are not compromised by limited site availability. Our initial assessment suggests that this is the situation in the District with regard to hotel development, so perhaps hotel site allocation needs to be considered.

Our initial assessment suggests market potential for, and possible accommodation operator interest in, the development of major accommodation operations in the District, particularly in the Lee Valley Regional Park. PGL's recent application to develop a children's activity holiday centre at Royal Gunpowder Mills is an example, albeit that it has been refused permission. Given the challenge to delivering developments of scale in Green Belt, consideration could be given to allocating some sites for major accommodation developments.

d) The Need to Define Criteria for Accommodation Development in the Lee Valley Regional Park and Epping Forest Area

The Lee Valley Regional Park Development Framework clearly identifies accommodation development as having a key role to play in developing LVRP as a visitor destination. It refers to a range of different types of accommodation that are considered to be appropriate in the Park, including some of scale. Consideration could be given to the need for a specific policy to support the development of these types of accommodation in LVRP, whether LVRP should be identified as a location of opportunity for accommodation development, and whether specific sites or locations need to be identified for accommodation in the Park. Given also that the LVRP straddles several local authority areas, the need for a cross-border approach to planning for visitor accommodation development here should also be considered.

Accommodation development could play a role in developing Epping Forest as a visitor destination, and generating new income streams to support Forest management. Given the restrictions on developing in the Forest, the opportunities for accommodation development in this part of the District are primarily in the buffer lands and other locations immediately surrounding the Forest. Care is however needed to ensure that new visitor accommodation in such locations does not create adverse and unwelcome visitor pressure on the Forest. There is merit therefore in considering whether planning policy can play a role in guiding and managing visitor accommodation development around the Forest. This might include identifying in the policy the types of accommodation which there could be potential for, and what criteria might be applied to any proposals, particularly in relation to protecting the Forest, whilst also supporting appropriate recreational use.

e) The Need for a Hotel/ Visitor Accommodation Retention Policy

Our assessment of the District's current hotel offer has identified at least three poor quality hotels that might look to go for alternative uses if they continue to trade poorly. With such a limited hotel supply at present, and the challenge of securing sites for new hotels, there could be a case for a policy that seeks to retain such hotels, in the hope that existing or new owners would be encouraged to invest in them, or bring them forward for redevelopment as budget or boutique hotels. Without such a policy in place the Council would have difficulty in challenging change of use applications for such properties. If such a policy is seen as being important, we would recommend a policy based on a marketing for sale test, with change of use applicants required to demonstrate that they have marketed the hotel for a reasonable period, through a reputable agent, and at a realistic price compared to similar hotels that have also been on the market.

f) The Scope to use Other Planning Interventions to Support Visitor Accommodation Development

In the Nathaniel Lichfield Economic Development Study for the Lee Valley White Water Centre (2011), they refer to:
'Current planning and tourism policies for the area are broadly supportive but not adequate to actively promote the type and scale of development envisaged'
They go on to suggest several approaches that could be considered within Local Plans, including:

- Designation of sites for Area Action Plans
- Designation of sites for the application of Local Development Orders
- Designation as Major Development Sites (brownfield) in the Green Belt
- Including policies that support leisure development in identified locations, subject to appropriate criteria

Consideration should be given to the use of these additional tools to help facilitate visitor accommodation development, particularly of scale, at key sites, and the stage of the Local Plan process that they would need to be introduced.

g) The Need for Targets – or not – in the Delivery of Visitor Accommodation

The Hardisty Jones economic and employment evidence for the Local Plan identified a need for between 50 and 190 rooms. It is not clear how this has been arrived at – possibly working back from employment forecasts. Phase 2 of the Visitor Accommodation Needs Study will identify what potential there is for a wide range of different forms of accommodation based upon market information. Consideration of the usefulness of targets, or not, is worthy of discussion going forward, and if so what these targets should be based on e.g. broader strategic objectives such as growth in staying visitor numbers and spending and increases in tourism-related employment.

h) Planning for Need or Potential

The term 'need' is widely used, but not clearly articulated in relation to visitor accommodation. In formulating future policy, consideration should be given to whether Local Plan policies for visitor accommodation should seek to deliver 'need' or 'potential', and how to demonstrate this, including whether this should relate back to the broader strategy adopted towards the development of visitor accommodation, and be a reflection of the degree to which the Council wants to see new visitor accommodation.

i) The Scale and Location of Visitor Accommodation Development

Underpinning any policy should be clarity around both the scale of development that the Council wants to see, and where it would best be located. Consideration should be given to a spatial strategy for visitor accommodation that might include a focus on hubs or a desire to spread development (and benefits), and that might also need to identify key locations that could deliver this. In terms of the scale of development sought, future policies need to consider whether large scale development could be accommodated in some locations and how to facilitate this through planning policy.

10 CONCLUSIONS & POLICY GUIDANCE

The Phase 1 Visitor Accommodation Needs Study has found:

- A limited supply of visitor accommodation currently in Epping Forest District.
- A political will and imperative beginning to be woven into policy that seeks to grow the visitor economy and increase the provision of visitor accommodation for a variety of reasons relating to the economic, employment, social, environmental and community benefits of doing so.
- Market potential for the development of a wide range of visitor accommodation offers.
- Some key locations of opportunity for visitor accommodation development in the Lee Valley Regional Park and around Epping Forest.
- A series of barriers to delivering new visitor accommodation and enhancements to existing accommodation, in terms of Green Belt restrictions; the block on development in Epping Forest; the availability of deliverable hotel sites in the District's settlements, and inability of hotels to compete for sites with higher value uses; and the lack of investment in, and poor performance of some hotels.

Planning policy has a role to play in setting the framework for the development of the visitor accommodation sector to facilitate the delivery of the right visitor accommodation developments in the optimum locations, so that they can be of maximum benefit to the District and help achieve wider benefits.

Other local authorities have approached this in a variety of ways, from very simplistic overarching policies to detailed multiple policies supported in some cases by SPDs, area/site specific policies, detailed development management policies, and the use of other planning tools such as site allocation. To do this requires a solid evidence base which is gathered throughout the process of the Local Plan preparation.

In terms of the stage that EFDC are currently at with the Local Plan, preparing draft policies for consultation, the key messages emerging from the Phase 1 work that should influence the emerging planning policy for visitor accommodation are:

- A strategic visitor economy policy that is generally permissive, flexible and supportive of visitor accommodation development is a good starting point that should open the door to being able to approve appropriate schemes, and make it clear that growing the visitor economy through accommodation development is a priority for the Council.

- Visitor accommodation should be a separate bullet within this policy rather than being wrapped up with visitor attractions and facilities to give greater prominence to the need for additional accommodation.

- The supporting text should reference the Visitor Accommodation Needs Assessment work, and could list the types of visitor accommodation that a need has been identified for. This will give greater direction to the market, developers, operators and landowners and Development Management officers, and may help schemes to come forward. A reference to the Visitor Accommodation Needs Assessment may however be deemed to be sufficient.

- Given the Members' concerns about schemes failing and then coming forward for permanent residential use, it would be worth exploring how best to prevent this and give out strong signals to the market that this will be resisted. This could be in terms of a robust visitor accommodation retention policy, with clear criteria for the evidence that change of use applicants will be required to submit. It could also be in terms of holiday occupancy restrictions that will be strictly enforced.

- Putting a retention policy in place for visitor accommodation will also help to resist the loss of hotels and visitor accommodation businesses that could have a future, given investment and perhaps redevelopment under existing or new owners.

- Consideration should be given to site allocation for hotels, although we understand that this would follow the current plan stage and could be a challenge in terms of identifying sites on which hotel development can be guaranteed.

- Consideration should be given to identifying the key opportunity areas of Lee Valley Regional Park and the Epping Forest buffer and neighbouring lands as a focus for visitor accommodation development – possibly within separate area or site policies, as Broxbourne have done.

Clearly the Phase 2 Visitor Accommodation Needs Assessment work will provide more evidence around the need and potential for the development of visitor accommodation across the District, to which the emerging planning policies can respond as allocation and development management policy work is progressed later in the year. Phase 2 modules of work will include:

- Hotel and visitor accommodation manager/owner survey – information on performance, capacity, denials and market trends
- Wider stakeholder consultations;
- A survey of land and property owners;
- Assessment of potential hotel and visitor accommodation development sites – including Council owned land and property;
- Testing hotel and visitor accommodation developer interest in the District – another indicator of need.

APPENDIX 1

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.

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 2

EPPING FOREST DISTRICT – VISITOR ACCOMMODATION ESTABLISHMENTS AUGUST 2016

HOTELS IN EPPING FOREST DISTRICT

Hotel	Location	Standard[1]	Rooms
Marriott Waltham Abbey	Waltham Abbey	4 star	162
The Bell Hotel	Epping	3 star	79
Mulberry House	Ongar	3 star	22
Roydon Marina Village Hotel	Roydon	2 star	19
Premier Inn Waltham Abbey	Waltham Abbey	Budget	99
Premier Inn Buckhurst Hill	Buckhurst Hill	Budget	50
Travelodge Chigwell	Chigwell	Budget	34
Phoenix Epping Hotel	North Weald	Lower Grade	60
The Rooms @ Forest Lodge Motel	Epping	Lower Grade	18

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

HOTELS JUST OUTSIDE EPPING FOREST DISTRICT

Hotel	Location	Standard	Rooms
Marriott Cheshunt	Broxbourne	4 star	143
Theobalds Park	Cheshunt	4 star	140
Hallmark Hotel London Chigwell Prince Regent	Woodford Bridge	4 star	61
Down Hall	Hatfield Heath	4 star Country House	100
Park Inn by Radisson	Harlow	3 star	119
Best Western Plus Epping Forest	Woodford Green	3 star	99
Green Man	Harlow	3 star	55
Manor of Groves Hotel, Golf & Country Club	High Wych	3 star	80
Holiday Inn Express	Harlow	Upper-tier Budget	122
Premier Inn Harlow	Harlow	Budget	81
Travelodge Harlow	Harlow	Budget	90
Premier Inn Chingford	Chingford	Budget	24
Travelodge Cheshunt	Cheshunt	Budget	80

INNS IN EPPING FOREST DISTRICT

Inn	Location	Standard	Rooms
The Blue Boar	Abridge	Boutique	6
Fox Inn	Matching Tye	n/a	12
Kings Oak	High Beach	n/a	12
Cock Inn	Sheering	n/a	12
The Black Bull	Fyfield	n/a	10
The Duke of Wellington	High Beach	n/a	6
The Green Man	Toot Hill	n/a	4

GUESTHOUSES AND B&Bs IN EPPING FOREST DISTRICT

Establishment	Location	Standard	Rooms
Diggins Farm Bed and Breakfast	Fyfield	5 star	2
Elmcroft Guest House	Thornwood Common	4 star	5
The Gate House	Epping		4

GUESTHOUSES AND B&Bs JUST OUTSIDE EPPING FOREST DISTRICT

Establishment	Location	Standard	Rooms
That Amazing Place	Old Harlow	Boutique	12
2 Burstead's Cottage	Sawbridgeworth		

SELF-CATERING ACCOMMODATION IN EPPING FOREST DISTRICT

Establishment	Location	Type	Standard	Units	Beds
The Great Barn	Ongar	Barn conversion	5 star	1	10
Willowside Cottages	Waltham Abbey	Barn conversion	3 star	3	10
Mandalay	Epping Green	Bungalow	n/a	1	2
Edge of Forest Cottage	Buckhurst Hill	Cottage	n/a	1	4
Home from Home Characterful Cottage	Buckhurst Hill	Cottage	n/a	1	4
Wentworth Court	Buckhurst Hill	Apartment	n/a	1	6
The Summer House	Buckhurst Hill	House	n/a	1	3
Blue Bell House	Loughton	House	n/a	1	6
The Ongar Bell	Ongar	Converted pub	n/a	1	12

HOLIDAY LODGE PARKS IN EPPING FOREST DISTRICT

Establishment	Location	Grade	Units
Roydon Marina Village	Roydon	n/a	66

airbnb ESTABLISHMENTS IN EPPING FOREST DISTRICT

Location	Type	Beds
Buckhurst Hill	House	3
Buckhurst Hill	Room	1
Buckhurst Hill	Flat	2
Buckhurst Hill	Summer House	1
Buckhurst Hill	Room	1
Buckhurst Hill	House	3
Buckhurst Hill	Cottage	2
Buckhurst Hill	Room	1
Buckhurst Hill	Room	1
Buckhurst Hill	House	4
Chigwell	2 Rooms	2
Chigwell	Room	1
Chigwell	Room	1
Chigwell	3 Rooms	3
Epping	Flat	2
Epping	Room	1
Epping	Flat	1
Epping	2 Rooms	2
Epping Upland	Cottage	1
High Beech	3 Rooms	3
Loughton	Room	1
Loughton	Room	1
Loughton	Cottage	2
Loughton	Flat	1
Loughton	Room	1
Loughton	Room	1
Loughton	Room	1
Loughton	Flat	2
Loughton	House	2
Loughton	Room	1
Loughton	Flat	1
Loughton	House	3
Lower Swains	Room	1
Nazeing	House	3
Sewardstone	Room	1
Theydon Bois	House	4
Theydon Bois	Room	1
Waltham Abbey	Barn	5
Waltham Abbey	House	2
Waltham Abbey	House	3
Waltham Abbey	Room	1
Total		**74**

TOURING CARAVAN & CAMPING SITES IN EPPING FOREST DISTRICT

Site	Location	Season	Grade	Caravan Pitches	Tent pitches	Statics Caravans	Other Units
Debden House Campsite	Loughton	May-Sept	n/a		300		
Lee Valley Campsite	Sewardstone	March - Jan	n/a	86			5 camping pods
Abbess Roding Hall Farm Certificated Location	Ongar	All Year	CL	5			
Mossford Green Nursery CS	Theydon Bois	All Year	CS	5	10		

TOURING CARAVAN & CAMPING SITES JUST OUTSIDE EPPING FOREST DISTRICT

Site	Location	Season	Grade	Caravan Pitches	Tent pitches	Statics Caravans	Other Units
Kelvedon Hatch Camping and Caravanning Club Site	Doddinghurst	Mar – Oct	4 star	90			2 glamping safari tents
Lee Valley Caravan Park	Dobbs Weir			70		24	12 wigwams + pre-pitched tents
Lee Valley Camping and Caravan Park	Edmonton			100	40		15 camping pods 3 pre-pitched tents

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

GROUP & YOUTH ACCOMMODATION IN EPPING FOREST DISTRICT

Establishment	Location	Type	Grade	Bedspaces
Gilwell Park Scout Activity Centre	Chingford	Children's activity holiday centre	n/a	236 + camping
Chigwell Row Campsite & Activity Centre	Chigwell	Children's activity holiday centre	n/a	
Lambourne End Centre for Outdoor Learning	Lambourne	Outdoor education centre	n/a	42 + camping

GROUP & YOUTH ACCOMMODATION JUST OUTSIDE EPPING FOREST DISTRICT

Establishment	Location	Type	Grade	Bedspaces
YHA London Lee Valley	Cheshunt	Youth hostel	4 star	118

SPECIALIST ACCOMMODATION IN EPPING FOREST DISTRICT

Venue	Location	Type of Accommodation	Standard	Bedrooms	Bedspaces
Jubilee Lodge	Chigwell	Respite holiday centre for disabled people	4 star	31	
Woodland Camp	Lambourne	Christian retreat and events centre			48 +camping
Gilwell Park Training & Event Centre	Chingford	Residential conference & training centre		35	

WEDDING VENUES WITH ACCOMMODATION

Venue	Location	Bedrooms
Blake Hall	Ongar	7

MARINAS IN EPPING FOREST DISTRICT

Establishment	Location	Berths
Roydon Marina Village	Roydon	315

APPENDIX 3

CURRENT TOURIST ACCOMMODATION SUPPLY IN COMPARATOR DISTRICTS

HORSHAM DISTRICT TOURIST ACCOMMODATION SUPPLY - JULY 2016

Type of Accommodation	Total Estabs	Total Bedspaces	%
Hotels	16	1024	16.5
Inns	15	184	3.0
Restaurants with Rooms	0	0	0
Guest Houses/ B&Bs	49	270	4.3
Self-Catering	91	540	8.7
Holiday Lodge Parks	0	0	0
Caravan & Camping Sites	17	208	32.3
Glamping Sites	9	115	1.9
Camping Pod sites	0	0	0
Holiday parks	3	1557	25.0
Residential Conference Centres	2	216	3.5
Wedding Venues with Accommodation	1	14	0.4
Spa Resorts/ Health Farms	0	0	0
Youth Hostels	1	56	0.9
Bunkhouse Barns	1	10	0.2
Residential/ Outdoor Education Centres	3	208	3.3
TOTAL	**208**	**6202**	**100**

SEVENOAKS DISTRICT TOURIST ACCOMMODATION SUPPLY - SEPTEMBER 2015

Type of Accommodation	Total Estabs	Total Bedspaces	%
Hotels	7	746	44.3
Inns	8	131	7.8
Restaurants With Rooms	0	0	0
Guest Houses/ B&Bs	31	201	11.9
Homestay/airbnb	12	51	3.0
Self-Catering	27	170	10.1
Holiday lodge parks	0	0	0
Caravan & Camping Sites	8	220	13.1
Glamping Sites	2	32	1.9
Camping Pod sites	0	0	0
Holiday parks	0	0	0
Residential Conference Centres	2	105	6.2
Spa Resorts/ Health Farms	0	0	0
Youth Hostels	0	0	0
Bunkhouse Barns	2	29	1.7
TOTAL	**99**	**1685**	**100**

APPENDIX 4

VISITOR ACCOMMODATION DEVELOPMENT PROPOSALS

SITE	Location	Development/Proposal
Proposals		
The Bell Hotel	Epping	Partial demolition and extension for a care home
Roydon Marina Village	Roydon	240 berth extension and associated parking/facilities
Skillet Hill	Waltham Abbey	Erection of 43 room hotel with restaurant and petrol station alongside extension to lorry park
Premier Inn Waltham Abbey	Waltham Abbey	34-bedroom extension
Mossford Green Nursery	Theydon Bois	Change of use to permit 15 motorhomes, tents or caravan pitches
Mulberry House	High Ongar	Demolition of 17 chalet rooms and replacement with 25 bedrooms, meeting room, gym, dining room and kitchen
King's Inn Hotel	Ongar	Two-storey detached building to provide 10 en-suite guest bedrooms
Royal Gunpowder Mills	Waltham Abbey	Proposal for a PGL children's activity holiday centre (capacity 900+)
Woodland Camp	Lambourne	Replacement of mobile homes with 42 new purpose-designed cabins
Morgans Farm	Norton Heath	Camping/camping huts associated with fishing, tennis, ancillary retail and club facilities
John Barleycorn	Epping	10-bedroom extension to pub
Rainbow and Dove	Hastingwood	Considering the addition of bedrooms
Potential Sites/Schemes		
St John's Rd	Epping	Mixed use scheme/development brief – could include a hotel
Civic Offices	Epping	Council owned site currently under review by PWC – hotel could be one option in a mixed use scheme
North Weald Airfield	North Weald	Hotel could be one of many uses being considered here
Epping Waltham Abbey Buckhurst Hill		Budget hotel interest – active site acquisition targets for Premier Inn & Travelodge

APPENDIX 5

NATIONAL TOURISM FORECASTS, MARKET TRENDS & INFLUENCES

Forecasts for UK tourism growth are favourable. Research undertaken by Deloitte and Oxford Economics for VisitBritain in 2013[4] 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.

[4] *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 fueling 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[5], are however very focused on spreading the benefits across the UK and there are opportunities for 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.

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

APPENDIX 6

NATIONAL VISITOR ACCOMMODATION DEVELOPMENT TRENDS OF RELEVANCE TO EPPING FOREST DISTRICT

Hotels

Hotel Development in London Suburbs

The past 10 years have seen significant activity in terms of the development of Premier Inn and Travelodge budget hotels in London suburbs. Premier Inn has opened new hotels in 2016, or has hotels under construction in Orpington, Brixton, Sidcup, Uxbridge, Lewisham, Tottenham Hale, Eltham and Clapham. Recent and planned Travelodge openings in London suburbs include hotels in Finchley, Raynes Park, Finsbury Park, Hackney, Richmond and Belvedere. Both companies continue to target London suburbs as locations for hotel development.

Hotel Development in South East/ East of England Towns

Key trends in hotel development in towns in the South East and East of England are as follows:

- **Premier Inn and Travelodge** have continued to open budget hotels in towns across the South East and East of England. Travelodge has opened new hotels in 2016, or has hotels currently under construction in East Grinstead, Haverhill, Bicester, Thetford and Kings Lynn. Recent and planned Premier Inn openings include Farnham, Farnborough, Ware, Hitchin, Havant, Colchester, Chelmsford, Maidenhead, Lewes and Chipping Norton. 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 Essex and Hertfordshire for one or other, or both of these hotel companies are currently Epping, Buckhurst Hill, Waltham Abbey, Colchester, Harlow, Maldon, Saffron Walden, Basildon, Brentwood, Canvey Island, Chelmsford, Grays/Thurrock, Southend, Broxbourne, Hertford, Potters Bar, Hitchin, Letchworth, Stevenage, Radlett, Rickmansworth, St Albans, Watford, and Welwyn Garden City.

- **Other budget brands**, Ibis, Hampton by Hilton and Holiday Inn Express tend to build larger hotels and will only consider larger towns and cities. In the South East and East of England new Holiday Inn Express hotels have opened in Colchester in 2011, Harlow in 2012 and St Albans in 2016.

- The development of **boutique and town house hotels** in historic towns and market towns, in some cases with hotel spas, e.g.

    - Blue Ivy Hotel in Colchester (http://blueivyhotel.co.uk):
    - Greyfriars in Colchester (http://greyfriarscolchester.co.uk/);
    - One Warwick Park in Royal Tunbridge Wells (www.onewarwickpark.co.uk);
    - 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).

- 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.

- 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)

- **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 per year. 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)


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.

Watersports Holiday Parks

Caravan holiday home and holiday lodge parks have successfully been developed in other parts of the UK. Some examples are as follows:

- Tallington Lakes, near Stamford in Lincolnshire is a 205-acre site providing a series of lakes for water sports including water skiing, jet skiing, wakeboarding, dinghy sailing, canoeing and fishing. Other facilities include a dry ski slope, off-road karting, a climbing tower, an outdoor swimming pool, a children's adventure playground and a restaurant and bar. Mature trees surround the site. In terms of accommodation, the site offers a range of 2 and 3-bedroom lakeside mobile homes to buy or rent and a touring caravan and camping site with 83 pitches. The park is currently developing a number of new luxury 2 and 3 bedroom lakeside lodges for sale and rental.
- Away Resorts' Tattershall Lakes Country Park is a 350-acre site set in woods located at Tattershall in Lincolnshire. The site has a 60-acre lake for water skiing and wake boarding and 4 fishing lakes. Other facilities include an 18-hole golf course, and indoor swimming pool, gym and spa, and a restaurant and bar. The park has around 200 privately owned static caravans, park homes and Swiss style log cabins and a small number of log cabins for rental. The park is gradually shifting over to park homes and log cabins as the demand for these types of unit increases and demand for

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static caravans reduces. More recently the site has added a canvas village of luxury bell tents.

- The Watermark Club at the Cotswold Water Park near Cirencester is the UK's largest holiday lodge development. It comprises over 400 privately owned New England style lakeside holiday lodges around 6 lakes that have gradually been developed over the last 20 years. Each lake is unique and the holiday homes are individually designed and furnished. They range from one to four-bedroom holiday homes and lodges in a variety of different styles. The majority of homes are retained by their owners for their exclusive use. The Club also offers a rental service for owners, which around 40 owners are currently using. Other owners let out their homes themselves or through letting agencies such as Orion Holidays (which specialises in letting properties at The Watermark) and some of the national self-catering agencies. The development offers a range of water sports, including cable-tow water skiing, wind surfing, sailing and fishing. Two of the lakes have lakeside brasseries and one has a gym. The club is currently selling the latest phase of 50 holiday homes around the Summer Lake. There are a number of other accommodation businesses at the Cotswold Water Park, which includes 140 lakes created as a result of sand and gravel extraction. These include the recently developed Waters Edge, Lake Pochard and Lakes by yoo holiday lodge developments; the Hoburne Cotswold holiday park, with holiday lodges, chalets, static caravans and touring caravan and camping pitches; and the 4 star Cotswold Water Park Four Pillars Hotel which opened in August 2007 with 234 bedrooms, a leisure club and spa, extensive conference facilities and 27 lakeside apartments.

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, 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.

Camping pod encampments and parks are now starting to develop across the UK. Examples include:

- West Stow Pods in Suffolk (www.weststowpods.co.uk);
- Bryn Dinas Camping Pods in Snowdonia (www.bryndinascampingpods.co.uk);

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 (

e
tcampsite.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[6]. 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.

[6] 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).