SOUTH DOWNS NATIONAL PARK VISITOR ACCOMMODATION REVIEW

Technical Appendices

Prepared for:
South Downs National Park Authority

December 2014

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APPENDIX 1

GLOSSARY OF DEFINITIONS – VISITOR 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

Upper Tier Budget

A limited service hotel that offers a higher specification room than a budget hotel, with an integral bar/restaurant and possibly some meeting rooms. They tend to be larger hotels of 80-120 rooms and will locate both on the approaches to towns if close to business/leisure drivers, in town/city centres, and close to major communications drivers such as airports.

Brand examples include Express by Holiday Inn, Ramada Encore, Hampton by Hilton.

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

5 Star

A luxury, full service offer, with highly personalised service/high staffing levels, fine dining and luxury throughout the offer. UK 5 star hotel provision is focused largely on London and major heritage cities such as Edinburgh, Bath, Oxford and Chester

Brand examples include InterContinental, Radisson Edwardian, Hyatt, Wyndham, Sheraton, Hilton, Sofitel, Corinthia, Kempinski

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

Budget Boutique

Design-led limited service hotels

Brand examples include Sleeperz, Z Hotels, Nadler Hotels, Ibis Styles

Townhouse Hotels

Small, luxury hotels of individual and distinctive style located in cities or large towns that offer a small number of luxury rooms, high quality fittings and a high guest to staff ratio. May offer a high quality restaurant or room service equivalent.

Brand examples include The Eton Collection, The Townhouse Collection.

Country House Hotels

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

Golf Hotels and Resorts

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

Luxury Family Hotels

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

Adult Only Hotels

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

Spa Hotels

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

Serviced Apartments

Studio, one and two-bedroom, and sometimes three-bedroom apartments with bedrooms, bathrooms, lounge and dining areas and kitchens that are available to book on a daily, weekly, monthly or longer basis and serviced daily or less frequently as required by the guest. They tend to be residential apartments or blocks of residential apartments that are either let out by their owners or managed and let out by a national, regional or local serviced apartment operator.

Serviced apartment operators include Bridgestreet, SACO, Roomzzz, StayCity, Staying Cool, Spires

Aparthotels

Hotels that offer apartments or suites with bedrooms, bathrooms, lounge and dining areas and kitchens and hotel services, including reception, daily cleaning, linen and toiletries. They are generally aimed at the extended stay market although can be booked nightly. They may also provide breakfast and/or sell food items for people to cook in their apartments. May also include limited leisure facilities.

Brand examples include Staybridge Suites, Adagio

Hotel Performance Terminology

Room Occupancy

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

Achieved Room Rate (ARR)

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

Revpar

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

Other Types of Accommodation

Inn

Bed and breakfast accommodation within a traditional inn or pub.

Boutique Inn

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

Restaurant with Rooms

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

Guest House

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

B&B

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

Boutique B&B

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

Farmhouse B&B

Bed and breakfast accommodation provided on a working farm.

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

Holiday Parks

Parks that offer caravan holiday homes for ownership or rental, possibly alongside touring caravan and camping pitches. They can range in size from small independently run parks to very large parks with extensive leisure, entertainment and catering facilities that are operated by national holiday park companies such as Park Holidays, Park Resorts, Haven and Parkdean Holidays

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.

Luxury Hostels

Hostels that feature contemporary interior design and offer a higher quality of accommodation

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.

Farm Stay

B&B, self-catering, caravanning or camping and glamping accommodation on working farms.

APPENDIX 2

NPPG - TOURISM PLANNING GUIDANCE (From March 2014)

The Department for Communities and Local Government is responsible for national planning policy and guidance. Guidance on ensuring the vitality of town centres includes reference to tourism.

Ensuring the vitality of town centres

Paragraph: 007 Reference ID: 2b-007-20140306

- What should local planning authorities consider when planning for tourism?

Please see here for the World Tourism Organisation's definition of tourism.

Tourism is extremely diverse and covers all activities of visitors . Local planning authorities, where appropriate, should articulate a vision for tourism in the Local Plan, including identifying optimal locations for tourism. When planning for tourism, local planning authorities should:

- consider the specific needs of the tourist industry, including particular locational or operational requirements;
- engage with representatives of the tourism industry;
- examine the broader social, economic, and environmental impacts of tourism;
- analyse the opportunities for tourism to support local services, vibrancy and enhance the built environment; and
- have regard to non-planning guidance produced by other Government Departments.

Local planning authorities may also want to consider guidance and best practice produced by the tourism sector. Further guidance on tourism can be found on the Visit England website.

http://planningguidance.planningportal.gov.uk/blog/guidance/ensuring-the-vitality-of-town-centres/ensuring-the-vitality-of-town-centres-guidance/ - paragraph 007Revision date: 06 03 2014

See overleaf for VisitEngland guidance.

Tourism Sector Tourism Planning Guidance[1]

1. How should tourism developers maximise the economic benefits of tourism for their areas?

Where appropriate key players in the tourism industry should seek a constructive dialogue with local planning authorities and involve those who have a role in delivery of tourism schemes and programmes. This will help to ensure that applications are developed with the benefit of a realistic and sustainable commercial perspective, and accord with planning policy.

The Local Plan's approach to tourism will need to be based upon a robust understanding of business needs within the tourism industry including a quantitative and qualitative assessment of future tourist accommodation, including hotels and holiday parks, visitor attractions, and supporting facilities, including concert, conference and exhibition space, theatres, museums, cafes, restaurants, pubs, nightclubs and sporting facilities as may be appropriate to the area and any strategy for tourism growth.

There may be circumstances where a traditional market has changed and the local tourism provision needs to restructure; in some areas long standing changes in visitor numbers may have left a considerable surplus of hotel, guest house, pub and bed & breakfast accommodation. This can leave many businesses struggling on very low turnover, unable to reinvest in improving their facilities. In such circumstances, owners and developers will need to work collaboratively with local planning authorities and others to provide where appropriate a productive alternative use for premises.

With declining income from beer sales, many pubs are increasingly dependent upon their food offer. This may lead to proposals to expand the kitchen, install flues, increase the number of covers through extensions, provide additional parking and enhanced garden areas. Some pubs may also look to provide bed & breakfast accommodation to support the continued pub use. Applications to adapt premises need to be mindful of adverse impacts on the appearance of what are often important historic and cultural buildings to the local community.

Even with the proper stakeholder involvement and thorough research, it will not be possible to predict and forecast all potential tourism growth opportunities.

[1] Source VisitEngland corporate website

2. How should tourism uses be accommodated in urban areas?

There are many types of tourist and leisure activities that particularly lend themselves to cities and major urban locations. The NPPF sets out the sequential test for main town centre uses that are not in an existing centre and are not in accordance with the Local Plan.

3. How should tourism be accommodated in rural areas?

Paragraph 28 of the NPPF supports sustainable rural tourism and leisure development as part of a prosperous rural economy.

In rural areas it may not always be possible to provide for all types and size of tourist facility within the tightly drawn boundaries of market towns and villages. Neither will it always be appropriate for a tourism facility to be located within a settlement. In rural areas the market for a rural tourism facility may often be in attractive countryside locations designated to protect their landscape beauty which may be distant from main service settlements.

4. What are the key locational considerations in choosing the best site for tourism development?

In order to be commercially successful, tourism sites must be accessible to their target market for visitors. New tourism developments should, where reasonable, facilitate the use of sustainable modes of transport.

Many small scale rural tourism developments are car dependent and the use of the car does not by default make the proposal unsustainable. Encouraging greater domestic tourism has the potential to support jobs and facilities in rural areas reducing out-commuting from those areas.

Many accommodation businesses of all types want to be located where customers can easily reach them by car, and the NPPF recognises that different policies and measures will be required in different communities and opportunities to maximise sustainable transport solutions will vary from urban and rural areas.

5. How can tourist accommodation be maintained as a tourism use?

As tourism is an all-year business, conditions restricting tourist accommodation to seasonal use should only be used where it is clear that the condition can be justified as being necessary, and meeting the other tests for lawful conditions laid out in paragraph 206 of the NPPF.

In locations where residential development would not be appropriate, local planning authorities may attach conditions to planning permissions for tourist accommodation to ensure that they are used for holiday purposes only. Where circumstances change, developers may wish to negotiate with their local planning authority the removal of already imposed conditions.

6. What about applications for permanent staff accommodation?

For many types of tourist accommodation, an on-site residential managerial presence is often essential, to deliver quality service to the customer, security for the property, and to meet the obligations of health and safety regulations. Accommodation may also be needed for key members of staff. In such cases there may be applications for conversion of suitable existing buildings at the site. Where this is not a feasible option, developers may apply to provide new, on-site accommodation, which should normally be in a form similar to that of the holiday accommodation of the site. Local planning authorities may wish to impose conditions to ensure that such accommodation is occupied for this purpose only. Applicants will need to note the restrictions on such development in certain sensitive areas, especially the Green Belt.

APPENDIX 3

SOUTH DOWNS VISITOR ACCOMMODATION STUDY
AUDIT OF CURRENT VISITOR ACCOMMODATION SUPPLY - NOVEMBER 2014

1. The Scope of the Audit

The audit of the current visitor accommodation supply of the South Downs National Park took as its starting point the audit that TSE completed in 2012. The results of this audit were crosschecked against a range of visitor accommodation websites to identify any accommodation businesses that are no longer trading and additional establishments that have opened in the National Park. The following websites were interrogated for the 2014 audit:

For Hotels, Guest Houses and B&Bs

- Tripadvisor
- Booking.com
- Laterooms
- Sawdays (for boutique properties)
- Mr & Mrs Smith (for boutique properties)

For Self Catering Accommodation

- Homeaway
- Holiday Lettings
- Owners Direct
- The Cottage Guide
- Premier Cottages
- Sawdays (for boutique properties)
- Unique Home Stays (for boutique properties)
- Mr & Mrs Smith (for boutique properties)
- Group Accommodation (for large self-catering properties)
- Agency websites:
    - Cottages 4 You
    - Sykes Cottages
    - English Country Cottages
    - Rural Retreats
    - Mulberry Cottages
    - Best of Brighton & Sussex Cottages

For Caravan & Camping Sites

- UK Campsite
- Pitchup
- Love Camping

For Glamping Sites
- Canopy & Stars
- Go Glamping
- Cool Camping

As far as possible the post codes of accommodation establishments were checked against the post code checking facility on the South Downs National Park Authority's website to verify that they fall within the National Park boundaries.

The audit includes a number of accommodation businesses in Arundel that lie just outside the boundary of the National Park. With Arundel being a key gateway town into the South Downs we felt that it was appropriate to record all accommodation businesses here as part of the National Park visitor accommodation supply.

2. Total Visitor Accommodation Supply in the National Park

The 2014 audit of visitor accommodation in the South Downs National Park identifies a total of 449 visitor accommodation businesses, with 9,510 bedspaces.

Table 1
SOUTH DOWN NATIONAL PARK VISITOR ACCOMMODATION SUPPLY
NOVEMBER 2014

Type of Accommodation	Total Establishments	%	Total Bedspaces	%
Hotels	24	5.3	2115	22.2
Inns	50	11.1	607	6.4
Guest Houses/ B&Bs	153	34.1	829	8.7
Self-Catering	161	35.9	937	9.9
Caravan & Camping Sites	39	8.7	4148	43.6
Glamping Sites	9	2.0	220	2.3
Group & Youth Accommodation	13	2.9	654	6.9
TOTAL	**449**	**100**	**9510**	**100**

Guest houses/B&Bs and self-catering establishments make up the most significant percentage of accommodation establishments in the National Park. Caravan and camping sites are the most significant in terms of bedspaces however, on the basis of each pitch potentially accommodating 4 people. Hotels are also more significant in terms of bedspace capacity. The hotel supply includes the Champneys Forest Mere spa hotel/health farm at Liphook. Glamping sites comprise the smallest percentage of the National Park's visitor accommodation supply. Glamping provision includes operations with yurts, bell tents, tipis, shepherds huts, fishing huts and one with a converted vintage lorry. There is only one site in the National Park that offers camping pods - the YHA South Downs hostel. Our research did not identify and static caravan holiday home parks or holiday lodge parks or complexes in the National Park.

3. Visitor Accommodation Just Beyond the National Park

There are a significant number of hotels just on the edge of the South Downs National Park, including a number of large branded 4 star hotels, luxury country house hotels with spas and budget hotels. A number of the hotels at Arundel also lie just outside the National Park, but as already indicated have been included as part of the National Park accommodation supply.

There are also significant concentrations of hotels close to the National Park in Brighton and Eastbourne, and to a lesser extent also in Chichester, Winchester and Worthing.

Table2
HOTELS ON THE EDGE OF SOUTH DOWNS NATIONAL PARK

Hotel	Location	Grading	Bedrooms
Hampshire			
Old Thorns Manor	Liphook	4 star	83
Metro Inn	Liphook	Budget	30
Alton House Hotel	Alton	3 star	43
Swan Hotel	Alton	3 star	36
Marriott Meon Valley	Shedfield	4 star	113
De Vere Venues New Place	Shirrell Heath	4 star	110
The Swan Hotel	New Alresford	3 star	22
Premier Inn Portsmouth (Horndean)	Horndean	Budget	25
Travelodge Havant Rowlands Castle	Rowlands Castle	Budget	21
Old House Hotel	Wickham	3 star	12
TOTAL			**495**
Surrey			
Lythe Hill Hotel & Spa	Haslemere	4 star	42
Georgian House Hotel & Spa	Haslemere	3 star	43
TOTAL			**85**
West Sussex			
Hilton Avisford Park	Walberton	4 star	139
Bailiffscourt Hotel & Spa	Climping	4 star	39
Travelodge Arundel Fontwell	Fontwell	Budget	40
TOTAL			**218**
East Sussex			
Premier Inn Eastbourne (Polegate)	Polegate	Budget	40
Premier Inn Newhaven	Newhaven	Budget	70
TOTAL			**110**
COMBINED TOTAL			**908**

While the audit has not included a detailed audit of other types of visitor accommodation business in the areas immediately surrounding the National Park it is clear from the work that we have undertaken that there are number of self-catering businesses, glamping sites, touring caravan and camping sites and static caravan holiday home and holiday lodge parks not far from the National Park boundaries. This includes at least 4 large touring caravan and camping sites:

- Northbrook Farm Caravan Club Site, Worthing (79 pitches);
- Brighton Caravan Club Site (269 pitches);
- Washington Caravan & Camping Park, Pulborough (100 pitches);
- Southdown Way Caravan & Camping Park, Keymer, East Sussex (80 pitches).

Static caravan holiday home and holiday lodge parks on the edge of the National Park include:

- Downsview Park at Woodmancote (55 owned static caravans and holiday lodges);
- Honeybridge at Dial Post (50 owned static caravans and luxury holiday lodges and 130 touring caravan and camping pitches);
- Three Ponds Holiday Park, Newhaven (130 owned static caravans)

There are also concentrations of touring caravan and camping sites and static caravan holiday home parks within easy reach of the National Park at Bognor Regis, Littlehampton, East Wittering and Selsey.

4. Changes in Supply

The results of this 2014 audit of visitor accommodation in the South Downs National Park are not directly comparable with the results of TSE's 2012 audit for a number of reasons:

- The Champneys Forest Mere spa hotel was not included in the TSE audit;
- We have separately identified inns, reclassifying some establishments that TSE recorded as hotels or guest accommodation into this category;
- We have undertaken a more comprehensive audit of agency let self-catering properties;
- We have used a multiple of 4 bedspaces per caravan and camping pitch. TSE used a multiple of either 6 or 4;

- We have included certificated caravan sites, which were not comprehensively included in the TSE audit;
- We have separately identified glamping sites;
- We have identified a number of activity holiday and outdoor education centres which were not included in the TSE audit.

It is not possible therefore to accurately quantify changes in the National Park's visitor accommodation supply since 2012. However, our audit and comparisons with the TSE audit show the following trends in visitor accommodation supply in the National Park:

- No new hotels have opened in the National Park.
- Five hotels have closed for conversion to other types of visitor accommodation or alternative uses:
    - Woodstock House Hotel at Charlton is currently being converted to the Woodstock Country Suites self-catering suites;
    - Developers are currently applying to demolish the now closed Uplands Park Hotel at Droxford and build 20 houses on the site;
    - The South Downs Hotel at Trotton is now trading as the South Downs Manor wedding venue, with 7 luxury double bedrooms for use by wedding parties;
    - The closed Sussex Pad Hotel at Lancing has been acquired by Lancing College;
    - The Birling Gap Hotel has closed. It is now operates as the National Trust's team room at the site.
- There appears to have been a reduction in the supply of guest house and B&B accommodation.
- There appears to have been a slight increase in the supply of inns, including some new boutique inns e.g. The Ram Inn at Firle.
- There would appear to have been a steady increase in the supply of self-catering provision, including the opening of some new holiday cottage barn conversion/replacement complexes e.g. Wallops Wood at Droxford and Inadown Farm Holiday Homes at Selborne.
- There has been some growth in glamping provision.
- The Arundel YHA hostel has closed but the new South Downs YHA hostel has opened.

4. Analysis by Location

The tables overleaf provide an analysis of the National Park's current visitor accommodation supply by district/borough and county in terms of numbers of establishments and bedspace capacity for each category of accommodation. Some key points:

- The current South Downs visitor accommodation supply is spread across the National Park broadly in proportion to the geographic coverage of each district/borough and county that has territory falling within the boundaries of the National Park. There are key concentrations of all types of visitor accommodation in Chichester, East Hampshire and Lewes Districts. The next most substantial concentrations of visitor accommodation businesses are in Arun and Wealden Districts and Winchester City Council's area.
- Arun has the greatest number of hotels and the most significant number of touring caravan and camping sites but Winchester and East Hampshire have the largest hotel bedspace capacity, while Winchester has the highest number of bedspaces on touring caravan and camping sites, including two large Caravan Club sites - Rookesbury Park and Morn Hill. Winchester has the only large hotel with more than 100 bedrooms in the National Park - the Holiday Inn Winchester (141 bedrooms). Winchester also has the most significant supply of group and youth accommodation, including the Rookesbury Park and Marwell Activity Centres. East Hampshire has the most significant supply of glamping provision, but this only constitutes a very small element of the District's total accommodation supply. Lewes has a relatively lower percentage of hotel bedspaces.
- Hotels are primarily located in Arundel, Midhurst, Petersfield, Lewes and Alfriston. There is no hotel in Petersfield town centre, only a Premier Inn budget hotel on the outskirts of the town on the A3.
- The supply of inns, guest houses, B&Bs and self-catering accommodation is spread across the National Park's towns, villages and rural areas. With 7.1% of the National Park's total bedspace capacity in inns and pub accommodation, Lewes town is the only location that has more than 5% of the National Park's supply of this type of accommodation. Locations that have more than 5% of the National Park's guest house and B&B bedspace capacity are Lewes (11% of the total supply), Midhurst (10%), Petersfield (6.9%) and Arundel (5.4%).
- The supply of touring caravan and camping sites, glamping sites and group and youth accommodation is spread across the National Park's rural areas.

Table 3
SOUTH DOWNS NATIONAL PARK VISITOR ACCOMMODATION SUPPLY - NOVEMBER 2014
ANALYSIS BY DISTRICT & COUNTY - ESTABLISHMENTS

District/County	Hotels		Inns		Guest Houses/B&Bs		Self-Catering		Caravan & Camp Sites		Glamping Sites		Group & Youth Accom		TOTAL	
	Estabs	%	Estabs	%	Estabs	%	Estabs	%	Estabs	%	Estabs	%	Estabs	%	Estabs	%
East Hampshire	4	16.7	13	26.0	35	22.9	31	19.3	7	17.9	3	33.3	2	15.4	95	21.2
Winchester	2	8.3	4	8.0	9	5.9	11	6.8	5	12.8	1	11.1	3	23.1	35	7.8
Hampshire	**6**	**25.0**	**17**	**34.0**	**44**	**28.8**	**42**	**26.1**	**11**	**30.7**	**4**	**44.4**	**5**	**38.5**	**130**	**29.0**
Adur													1	7.7	1	0.2
Arun	6	25.0	2	4.0	9	5.9	21	13.0	10	25.6	1	11.1	2	15.4	51	11.3
Chichester	5	20.8	15	30.0	50	32.7	50	31.1	6	15.4	1	11.1			127	28.3
Horsham	1	4.2	4	8.0	11	7.2	11	6.8	3	7.7					30	6.7
Mid Sussex							1	0.6			1	11.1			2	0.4
Worthing	1	4.3	2	4.0											3	0.7
West Sussex	**13**	**54.2**	**23**	**46.0**	**70**	**45.7**	**83**	**51.5**	**19**	**48.7**	**3**	**33.3**	**3**	**23.1**	**214**	**47.6**
Eastbourne					1	0.7	2	1.2					1	7.7	4	0.9
Lewes	3	12.5	7	14.0	29	18.9	17	10.6	6	12.8	2	22.3	2	15.4	65	14.5
Wealden	2	8.3	3	6.0	9	5.9	17	10.6	3	7.7			2	15.4	36	8.0
East Sussex	**5**	**20.8**	**10**	**20.0**	**39**	**25.5**	**36**	**22.4**	**9**	**20.5**	**2**	**22.3**	**5**	**38.4**	**105**	**23.4**
TOTAL	**24**	**100**	**50**	**100**	**153**	**100**	**161**	**100**	**40**	**100**	**9**	**100**	**13**	**100**	**449**	**100**

Table 4
SOUTH DOWNS NATIONAL PARK VISITOR ACCOMMODATION SUPPLY - NOVEMBER 2014
ANALYSIS BY DISTRICT & COUNTY - BEDSPACES

District/County	Hotels		Inns		Guest Houses/B&Bs		Self-Catering		Caravan & Camp Sites		Glamping Sites		Group & Youth Accom		TOTAL	
	Beds	%	Beds	%	Beds	%	Beds	%	Beds	%	Beds	%	Beds	%	Beds	%
East Hampshire	440	20.8	172	28.3	158	19.1	162	17.3	448	10.8	96	43.6	67	10.2	1543	16.2
Winchester	435	20.6	41	6.8	47	5.6	104	11.1	1048	25.3	12	5.5	268	41.0	1955	20.6
Hampshire	**875**	**41.4**	**213**	**35.1**	**205**	**24.7**	**266**	**28.4**	**1496**	**36.1**	**108**	**49.1**	**335**	**51.2**	**3498**	**36.8**
Adur													56	8.6	56	0.6
Arun	348	16.5	37	6.1	70	8.4	102	10.9	884	21.3	48	21.8	42	6.4	1531	16.1
Chichester	447	21.1	164	27.0	273	32.9	277	29.6	860	20.7	2	0.9			2023	21.3
Horsham	76	3.6	68	11.2	76	9.2	40	4.2	120	2.9					380	4.0
Mid Sussex							4	0.4			24	10.9			28	0.3
Worthing	20	0.9	21	3.5											41	0.4
West Sussex	**891**	**42.1**	**290**	**47.8**	**419**	**50.5**	**423**	**45.1**	**1864**	**44.9**	**74**	**33.6**	**98**	**15.0**	**4059**	**42.7**
Eastbourne					12	1.5	22	2.3					32	4.9	66	0.7
Lewes	206	9.7	79	13.0	125	15.1	112	12.0	428	10.3	38	17.3	88	13.5	1076	11.3
Wealden	143	6.8	25	4.1	68	8.2	114	12.2	360	8.7			101	15.4	811	8.5
East Sussex	**349**	**16.5**	**104**	**17.1**	**205**	**24.8**	**248**	**26.5**	**788**	**19.0**	**38**	**17.3**	**221**	**33.8**	**1953**	**20.5**
TOTAL	**2115**	**100**	**607**	**100**	**829**	**100**	**937**	**100**	**4148**	**100**	**220**	**100**	**654**	**100**	**9510**	**100**

5. Analysis by Standard

The table overleaf provides an analysis of the National Park's visitor accommodation supply by grading.

Two thirds of accommodation establishments are currently ungraded. This does not necessarily denote establishments of a lower quality however. Some are undoubtedly of a very high standard, while others may not offer such a good standard of accommodation. Increasing numbers of accommodation operators are opting not to be graded either due to the cost or because they feel that the grading schemes are no longer relevant at a time when customers are increasingly booking through online travel agents that use their own grading systems or allow self rating, or taking much more notice of customer reviews and ratings on Tripadvisor.

The National Park has a small number of luxury and boutique hotels, inns, B&Bs and self-catering establishments. Examples include:

Luxury Hotels

- Amberley Castle
- Park House Hotel, Bepton

Boutique Inns

- The White Horse, Chilgrove
- Halfway Bridge Inn, Lodsworth
- Royal Oak Inn, East Lavant
- The Ram Inn, Firle

Boutique B&Bs

- Berkeley House, Lewes
- Blue Door Barns, Beddingham
- The Church House, Midhurst
- The Barn at Roundhurst
- Burpham Country House
- Lenham, Lewes

Table 5
SOUTH DOWNS NATIONAL PARK VISITOR ACCOMMODATION SUPPLY - NOVEMBER 2014
ANALYSIS BY STANDARD/GRADE

District/County	Hotels		Inns		Guest Houses/B&Bs		Self-Catering		Caravan & Camp Sites		Glamping Sites		Group & Youth Accom		TOTAL	
	Estabs	%	Estabs	%	Estabs	%	Estabs	%	Estabs	%	Estabs	%	Estabs	%	Estabs	%
Luxury	4	16.7					2	1.2							6	1.3
Boutique	2	8.3	3	6.0	10	6.5	2	1.2							17	3.8
5 star			1	2.0	5	3.3	14	8.7							20	4.4
4 star	2	8.3	4	8.0	28	18.3	32	19.9							66	14.7
3 star	12	50.0			6	3.9	11	6.8							29	6.5
2 star	1	4.2													1	0.2
Branded Budget Hotel	2	8.3													2	0.5
Ungraded	1	4.2	42	84.0	104	68.0	100	62.1	39	100			13	100	299	66.6
No national grading											9	100			9	2.0
TOTAL	**24**	**100**	**50**	**100**	**153**	**100**	**161**	**100**	**39**	**100**	**9**	**100**	**13**	**100**	**449**	**100**

Luxury/ Boutique Self-Catering

- Cornucopia, Lurgashall
- Tagents Barn, Graffham
- The Stables at Black Hedges Farmhouse, West Meon
- Pitlands Barns, Up Marden

Of the graded accommodation establishments the most significant percentage are 4 star, followed by 3 star establishments and then 5 star operations.

Half of the National Park's hotels are graded as 3 star under either the VisitBritain/ AA grading scheme or the ratings systems of the main online travel agents (booking.com and LateRooms). An analysis of Tripadvisor reviews for the National Park's 3 star hotels suggests that some of them have seen little recent investment and offer a low standard of accommodation, judging by the low customer ratings that they are receiving and customers comments about them being tired, shabby and outdated.

We have not assessed the accessibility of the National Park's visitor accommodation supply as part of our audit. We would however comment that we only came across two self-catering properties (Middledown Cottage at Innadown Farm Cottages at Selborne and Teal Cottage at Wallops Wood Cottages at Droxford) that claim to offer wheelchair accessible accommodation, although neither property offers 'Access Exceptional ' accommodation that has been fully adapted for use by an independent wheelchair user.

6. Analysis by Size

The following tables provide an analysis of the current supply of different types of visitor accommodation in the National Park by size.

They show that the majority of visitor accommodation businesses in the National Park are small in scale. Key observations regarding the scale of visitor accommodation businesses in the South Downs are as follows:

- 75% of hotels have under 50 bedrooms;
- There is only one hotel with more than 100 bedrooms - the Holiday Inn Winchester at Morn Hill (141 bedrooms);
- 58% of inns have fewer than 5 bedrooms;
- 82% of guest houses and B&Bs have 1-3 letting bedrooms;
- 75% of self-catering establishments have only one unit;
- There are only 8 holiday cottage complexes across the National Park with 5 or more letting units. Only a few of these complexes also have leisure facilities, such as swimming pools and games rooms;
- The majority of self-catering units have 1,2 or 3 bedrooms;
- There are only 6 large self-catering properties (super cottages) across the National Park that can sleep 10 or more guests:
    - Upper House, Petersfield (16 bedspaces)
    - Cornucopia, Lurgashall (14 bedspaces)
    - Hill Place, Swanmore (14 bedspaces)
    - Little Oaks, Bepton (12 bedspaces)
    - Regents House, Arundel (11 bedspaces)
    - The Cottage, Fernhurst (10 bedspaces)
- 77% of touring caravan and camping sites have under 50 pitches and at least 40% have 10 or fewer pitches

Table 6
SOUTH DOWNS HOTEL SUPPLY - NOVEMBER 2014 - BY SIZE

Number of Bedrooms	Hotels	%
1-10	0	0
11-20	6	25.0
21-30	4	16.7
31-40	6	25.0
41-50	2	8.3
51-100	5	20.8
101-150	1	4.2
TOTAL	**24**	**100**

Table 7
SOUTH DOWNS INNS SUPPLY - NOVEMBER 2014 - BY SIZE

Number of Bedrooms	Inns	%
1	0	0
2	4	8.0
3	8	16.0
4	8	16.0
5	9	18.0
6	9	18.0
7	2	4.0
8	2	4.0
9	1	2.0
10	3	6.0
11+	4	8.0
TOTAL	**50**	**100**

Table 8
SOUTH DOWNS GUEST HOUSE/ B&B SUPPLY - NOVEMBER 2014 - BY SIZE

Number of Bedrooms	Guest Houses/ B&Bs	%
1	29	18.9
2	55	35.9
3	42	27.4
4	14	9.2
5	4	2.6
6	4	2.6
7	1	0.7
8	2	1.3
9	1	0.7
10	0	0
11+	1	0.7
TOTAL	**153**	**100**

Table 9
SOUTH DOWNS SELF-CATERING SUPPLY - NOVEMBER 2014
BY SIZE OF OPERATION (NUMBER OF LETTING UNITS)

Number of Letting Units	Estabs	%
1	121	75.2
2	20	12.4
3	12	7.4
4	0	0
5	4	2.5
6	1	0.6
7	0	0
8	3	1.9
TOTAL	**161**	**100**

Table 10
SOUTH DOWNS SUPPLY OF TOURING CARAVAN & CAMPING SITES - NOVEMBER 2014
BY SIZE (NUMBER OF PITCHES)

Number of Pitches	Sites	%
5/6	11	31.5
10	3	8.6
15/16	4	11.4
20-25	7	20.0
30-40	2	5.7
50-100	6	17.1
100+	2	5.7
TOTAL	**35**	**100**

Note: The number of pitches could not be established for 5 sites

APPENDIX 4

SOUTH DOWNS – VISITOR ACCOMMODATION PROPOSALS – PLANNING EXTRACTS

Shaded = duplicate entry/multiple accommodation types

SITE	PROJECT DESCRIPTION	DATE	DECISION
HOLIDAY LODGES			
Land Parcel At 530024 114907 Brighton Road Hassocks West Sussex	Change of use of land to provide a new football pitch, 5 no. Eco-lodges and associated access, parking and landscaping.	25-Jun-13	Approved
Land South West Of Hardham Mill Business Park London Road Hardham West Sussex	Proposed camping lodge	31-Jan-14	Withdrawn
Marwell Activity Centre Hurst Lane Owslebury Winchester SO21 1EZ	Use of the land for siting of portable visitor accommodation; 5 no. Timber lodges and 7 no. Timber eco-pods	17-Jul-13	Approved
Whitewool Farm Whitewool Lane East Meon Petersfield Hampshire GU32 1HW	Siting and use of 6 no. Fishing huts for holidays, short breaks and fishing courses		

SITE	PROJECT DESCRIPTION	DATE	DECISION
GLAMPING			
The Sustainability Centre Mercury Park Droxford Road East Meon Petersfield Hampshire GU32 1HR	Retention of three residential yurts	14-Feb-13	Approved
Church Farm Manor Farm Lane Priors Dean Petersfield Alton Hampshire GU32 1BS	Change of use of cottage and barn, erection of one yurt to be used as a residential training facility. Retention of single storey addition to rear of cottage	10-May-13	Refused
Land North East Of Garden Cottage London Road Sheet Petersfield Hampshire	Retrospective change of use from forestry to forestry, tourism, leisure and education and the siting of up to six seasonal yurts.		
Cedar Valley Bereleigh Estate Bereleigh House Road East Meon Petersfield Hampshire	Three tree houses to provide holiday let accommodation.	08-Feb-13	

SITE	PROJECT DESCRIPTION	DATE	DECISION
Blackberry Wood Caravan Park Streat Lane Streat East Sussex BN6 8RS	Change of use of land from caravan storage area to holiday accommodation for two units including the erection of two treehouses	13-Jun-13	Approved
TOURING CARAVAN & CAMPING SITES			
Land On The West Side Of Lodge Lane Ditchling East Sussex	Creation of a seasonal campsite for up to 30 pitches and erection of facilities building	19-Feb-13	Refused
Land Parcel At 531348 114639 Lodge Lane Hassocks West Sussex	Retrospective permission for permanent wardens accommodation in a static caravan on previously approved touring caravan pitch, ground maintenance equipment store building in previously approved refuse storage yard	22-Apr-13	Approved
Stedham Campsite Tote Lane Stedham Midhurst GU29 0PY	Continued use of land as campsite	07-Feb-13	Approved
West Fork Farnham Road Liss Hampshire GU33 6LA	Change of use of land for camping and caravaning, the provision of three eco pods and a shower/toilet block (as amplified by information and plan received 18 _ 26 march 2013).	08-Feb-13	Approved

SITE	PROJECT DESCRIPTION	DATE	DECISION
Petland Barn Heighton Street Firle East Sussex	Creation of a seasonal campsite for up to 40 pitches including facilities	19-Feb-13	Withdrawn
Chantry Farm Pyecombe Street Pyecombe West Sussex	Low-impact and environmental sustainable campsite to be situated at chantry farm. The camping season will be 1st march - 30th october annually. The campsite will be extensive in nature and sited with specific consideration to minimise the impact	23-May-13	Approved
Stoneyfield Farm Shellbridge Road Slindon West Sussex BN18 0LT	Development of land for camping and caravan site, together with associated buildings.		
P W Taylor & Partners, Housedean Farm Brighton Road Lewes East Sussex BN7 3JW	Change of use of 0.25ha of agricultural land to use as a campsite & erection of toilet and shower facilities		
The Deers Hut Griggs Green Liphook Hampshire GU30 7PD	Shower block associated to existing camp site (amended plans showing revised siting of shower block received 07/12/2012)		

SITE	PROJECT DESCRIPTION	DATE	DECISION
Rookesbury Park Caravan Club Site Wickham Fareham PO17 6JR	Installation of an additional 19 all-weather caravan pitches to replace existing grass caravan pitches, gravel top surface to match existing all-weather pitches on site no. 17 9x9m and no. 2 12x9m, construction of tarmac spur 3x15m to aid access	18-Feb-13	Approved
Blackberry Wood Caravan Park Streat Lane Streat East Sussex BN6 8RS	Change of use of land from caravan storage area to holiday accommodation for two units including the erection of two treehouses	13-Jun-13	Approved
CAMPING PODS			
West Fork Farnham Road Liss Hampshire GU33 6LA	Change of use of land for camping and caravaning, the provision of three eco pods and a shower/toilet block (as amplified by information and plan received 18 _ 26 march 2013).	08-Feb-13	Approved
YHA South Downs Itford Farm Itford Farm Lane Itford East Sussex BN8 6JS	Erection of four camping pods within the grounds of the YHA South Downs hostel at Itford Farm	02-Apr-13	Approved

SITE	PROJECT DESCRIPTION	DATE	DECISION
HOTEL/SERVICED ACCOMMODATION			
Blacknest Golf Club Ltd Blacknest Road Blacknest Alton GU34 4QL	Two storey extension to side to provide ten guest rooms and associated landscaping	19-Jun-13	Apprived
Hunters Lodge Midhurst Road Lavant Chichester West Sussex PO18 0DA	Change of use of guest house to dwelling	14-Mar-13	Refused
The Tote House The Old Racecourse Lewes East Sussex BN7 1UR	Erection of an extension for the use of bed and breakfast/short stay guests		
Meon Boscage Brockbridge Road Meonstoke Southampton Hampshire SO32 3AJ	Change of use of the land and building to guesthouse with seasonal camping for up to 3 years		

SITE	PROJECT DESCRIPTION	DATE	DECISION
The Courthouse Friars Walk Lewes East Sussex BN7 2PG	Demolition of existing courthouse buildings and redevelopment of site for the erection of a mixed-use development comprising flexible retail and leisure uses (use class a1, a2, a3, a4, d1 or d2) at ground floor and a 62-bed hotel on first and second floor	24-May-13	Refused
Woodstock House Hotel East Dean Lane Charlton Singleton Chichester West Sussex PO18 0HU	Extension of time of extant planning permission SE/10/03021/FUL. Change of use of Woodstock House Hotel to four self - catering holiday apartments with owner's accommodation, including various external and internal additions and alterations.	11-Jul-13	Approved
Woodstock House Hotel Charlton Road Charlton Chichester PO18 0HU	Conversion of a hotel into a residential unit with 6 no. Adjoining holiday units, including the demolition and replacement of the conservatory, the demolition of the courtyard toilet block and an extension to the detached cottage to the rear	19-Nov-13	Withdrawn
Sussex Pad Hotel Old Shoreham Road Lancing West Sussex BN15 0RH	Application for change of use from A4 (public house) with ancillary C1 (hotel) to C2 (boarding school accommodation) for Lancing College	14-Nov-13	Approved
Pelham House St Andrews Lane Lewes East Sussex BN7 1UW	Conversion of existing first floor area to form five new hotel bedrooms with en-suites, infill internal door to ground floor, external installation of two new black cast iron soil pipes, installation of five black ventilation louvres	05-Dec-13	Approved

SITE	PROJECT DESCRIPTION	DATE	DECISION
3a Fisher Street Lewes East Sussex BN7 2DG	Change of use from C1 hotel to 3 x two bedroom flats & 6 x one bedroom flats including first floor rear extension	26-Mar-13	Approved
Wickwoods Country Club Hotel & Spa Shaves Wood Lane Albourne Hassocks BN6 9DY	Erection of a conservatory at the rear of Wickwoods Country Club, Hotel and Spa	07-Aug-13	Approved
Upland Park Garrison Hill Droxford Hampshire SO32 3QL	Demolition of the existing hotel and other buildings and construction of 5 no. Detached dwellings with separate garages with living or work space above each garage, landscaping, private amenity space, access and parking	03-Apr-13	Withdrawn
Holiday Inn Hotel Winchester Telegraph Way Winchester Hampshire SO21 1HZ	Extension to existing hotel to provide additional rooms, gym/leisure facilities and meeting rooms including alterations to car park layout, landscaping and earthworks; erection of bike shelter		
Lawns Hotel Gosport Road Privett Alton Hampshire GU34 3NN	Conversion of coach house into dwelling with two storey extension to rear, first floor extension to front, dormer windows to front (revision to that approved under SDNP/24436/008 by EHDC)		

SITE	PROJECT DESCRIPTION	DATE	DECISION
Birling Gap Hotel Birling Gap East Dean Eastbourne BN20 0AB	Change of use of the (former) Birling Gap Hotel to visitor facilities to include an enlarged cafe, retail facility and education and interpretation facilities, together with the erection of a garage for storage of essential countryside management equipment and minor works to external appearance of the building.		
Woodstock House Hotel East Dean Lane Charlton Singleton Chichester West Sussex PO18 0HU	Change of use of 4 no. Self-catering holiday apartments with owners accommodation.		
Champneys Forest Mere Portsmouth Road Milland Liphook West Sussex GU30 7JG	Application to extend implementation period of planning permission reference ml/10/02687/ext. Demolition of existing dilapidated staff units (13 units) and erection of 12 staff/guest units with car parking and bicycle sheds.	25-Mar-13	Refused
White Hart Inn The Street South Harting Petersfield GU31 5QB	Conversion of existing outbuilding to overnight guest accommodation (06/00982/FUL).	10-Dec-13	Approved

SITE	PROJECT DESCRIPTION	DATE	DECISION
Hillbarn Golf Club Hill Barn Lane Worthing West Sussex BN14 9QF	Conversion and extension of existing flint barn to function and conference suite, relocation of existing and additional car parking spaces and erection of new green keeper's storage and maintenance building. Landscaping of existing car park	27-Sep-12	Approved
SELF-CATERING/HOLIDAY LET			
Diddybones Knap Diddybones Nap Forestside Stoughton Rowlands Castle West Sussex PO9 6EH	Change of use of first floor space above the garage and stores into self-catering tourist accommodation.	22-Aug-13	Approved
West Lavant Farm West Lavant Road Lavant Chichester West Sussex PO18 9AH	SDNP/12/01960/FUL use of north barn as two tourist units in place of permitted b1 (business use) under reference LV/12/01909/FUL		
Farm House Gallops Farm Stable Lane Findon Worthing West Sussex BN14 0RP	Conversion of redundant building into holiday let		

SITE	PROJECT DESCRIPTION	DATE	DECISION
Cobs Cottage Dundridge Lane Bishops Waltham Southampton Hampshire SO32 1GD	Change of use of existing domestic outbuilding to 1 bed self catering holiday let		
Warehead Stud Thicket Lane Halnaker Chichester PO18 0QS	Use of part of outbulilding as holiday let.		
Beaconsview Lewes Road Westmeston Hassocks East Sussex BN6 8RH	Conversion of existing barn to holiday accommodation (re-submission of planning application SDNP/12/02309/FULI)	24-May-13	Approved
Beeding Court Shoreham Road Upper Beeding Steyning BN44 3TN	Conversion of part of the existing outbuilding to create a single unit of holiday accommodation including insertion of new openings and associated landscaping works (full planning)	16-Jul-13	Withdrawn
Pepperscombe Farm Newham Lane Steyning West Sussex BN44 3LR	Demolition of existing atcost barn and erection of replacement barn comprising hay storage on ground floor with 2 bed holiday let unit at first floor	11-Jul-13	Approved

SITE	PROJECT DESCRIPTION	DATE	DECISION
Land At Lythe Lane Steep Petersfield Hampshire	Conversion of existing stable building (known as froxfield stables) for use as holiday let accommodation with associated works including car parking	19-Sep-13	Refused
Brockhurst Barn The Street Washington Pulborough West Sussex RH20 4AS	Change of use of barn (self contained ancillary accommodation) to provide holiday letting	04-Sep-13	Approved
Hillside Fruit Farm Bury Common Bury Pulborough West Sussex RH20 1NR	Proposed change of use from redundant farm shop to holiday let accommodation (A1 to C3).	18-Sep-13	Approved
Pilgrims Cottage Hoe Street Hambledon Waterlooville Hampshire PO7 4RE	Change of use of existing residential pool house to holiday accommodation	28-Oct-13	Approved
Burton Rough Cottage Burton Park Road Petworth West Sussex GU28 0JS	Conversion of part of dwelling currently used as a store room to create a two bedroomed holiday let.	21-Oct-13	Approved

SITE	PROJECT DESCRIPTION	DATE	DECISION
Downlands Farm Ovenhay Copse Lane Priors Dean Petersfield Hampshire GU32 1BP	Conversion of part of agricultural barn to 3 holiday cottages	06-Nov-13	Approved
Shoats Farm A272 Brinksole Lane To Wakestone Lane Foxhill Petworth West Sussex GU28 0HE	Change of use of farm building to holiday let accommodation.	07-Oct-13	Approved
The Warenne Barn New Way Lane Hurstpierpoint Brighton West Sussex BN6 9BD	Removal of condition 7 on planning permission 05/02192/FUL to allow independent residential use rather than holiday accommodation.	17-Jan-14	Approved
Verdley Farm Poors Common Road Easebourne Haslemere West Sussex GU27 3HG	Change of use and conversion of barn to holiday let accommodation	11-Apr-13	Withdrawn
Milland House Milland Lane Liphook Hampshire GU30 7JN	Change of use and alterations to an existing barn to provide letting accommodation (holiday use) and provision of 20 new stables and associated facilities.	05-Oct-12	Approved

SITE	PROJECT DESCRIPTION	DATE	DECISION
2 Cobbe Place Newhaven Road Beddingham Lewes East Sussex BN8 6JY	Demolition of outbuilding and erection of holiday let and section 73a retrospective application for the retention of garage, pergola, outdoor fireplace and shed and continued use of three outbuildings as holiday lets	11-Feb-13	Approved
Pump House Mill Hill Shoreham-By-Sea West Sussex BN43 5FA	Resubmission of SDNP/13/00387/FUL for conversion of stables into 2 holiday lets with parking	09-Apr-13	Approved
Ashford Farm Ashford Lane Steep Petersfield Hampshire GU32 1AA	Detached dwelling for use as holiday let following demolition of barn	11-Mar-13	Approved
Black Hedges Farmhouse Lynch Lane West Meon Petersfield Hampshire GU32 1JH	Erection of building attached to existing garage to form one bedroom holiday let (part retrospective)		
Gibraltar Farm Wick Street Firle Lewes East Sussex BN8 6NB	Change of use from holiday lets to holiday let plus ancillary residential accommodation and alterations		

SITE	PROJECT DESCRIPTION	DATE	DECISION
2 Cobbe Place Newhaven Road Beddingham Lewes East Sussex BN8 6JY	Continued use from ancillary domestic to holiday lets		
Farm House Gallops Farm Stable Lane Findon Worthing West Sussex Bn14 0RP	Conversion of redundant building into holiday let		
Ashford Farm Ashford Lane Steep Petersfield Hampshire GU32 1AA	Detached dwelling for use as a holiday let following demolition of barn.		
Alderney Stud Quarry Farm Empshott Green Lane Hawkley Liss Hampshire GU33 6HU	Conversion of building from stables/teaching area to single equestrian holiday let with two dormer windows to front		

SITE	PROJECT DESCRIPTION	DATE	DECISION
YOUTH & GROUP ACCOMMODATION			
Youth Hostel Sefton Place Warningcamp Arundel West Sussex BN18 9QY	Sui generis change of use to heritage centre with guest bedrooms and managers residence. Conservatory extension and removal of washroom		

APPENDIX 5

SOUTH DOWNS VISITOR ACCOMMODATION STUDY
SURVEY OF SMALL ACCOMMODATION BUSINESSES
SURVEY RESULTS

1. Purpose of the Survey

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

2. Methodology and Sample

The survey was undertaken through a CATI (computer assisted telephone interview) survey of a random sample of 80 B&Bs and guest houses, inns and pub accommodation businesses, self-catering establishments and touring caravan and camping sites. The survey sample was broken down by type of visitor accommodation business as follows:

TABLE 1: SURVEY SAMPLE

Type of Accommodation Business	Number of Completed Interviews
B&Bs and Guest Houses	25
Inns	15
Self-Catering	30
Touring Caravan and Camping Sites	10
Total Interviews	**80**

The average sizes of the accommodation businesses interviewed were as follows:

TABLE 2: AVERAGE SIZE OF ACCOMMODATION BUSINESS INTERVIEWED

Type of Accommodation Business	Average Size of Business Interviewed
B&Bs and Guest Houses/ Inns	4.63 rooms
Self-Catering	1.9 units
Touring Caravan and Camping Sites	23.4 pitches

3. Length of Time Accommodation Businesses Have Been Established

The survey shows strong growth in terms of pub accommodation (with over half of the pub accommodation businesses interviewed having opened in the last 3 years) and slight growth in other types of visitor accommodation. B&B, guest house, self-catering and touring caravan and camping businesses were generally more established however (with the majority having been in business for at least 3 years).

TABLE 3: LENGTH OF TIME ACCOMMODATION BUSINESSES HAVE BEEN ESTABLISHED

Type of Accommodation Business	% of Accommodation Businesses Interviewed	
	Operating for Under 3 Years	Operating for More Than 3 Years
B&Bs and Guest Houses	16	84
Inns/ Pub Accommodation	53	47
Self-Catering	17	83
Touring Caravan and Camping Sites	10	90

4. Seasonal Operation of Accommodation Businesses

Perhaps unsurprisingly a majority of touring caravan and camping sites were seasonal operations. A significant minority (30%) are however open all year and another 14% are planning to extend their opening season in the next 2 years. Most other types of visitor accommodation business are open all year.

TABLE 4: SEASONAL OPERATION OF ACCOMMODATION BUSINESSES

Type of Accommodation Business	% of Accommodation Businesses Interviewed	
	Operating on a Seasonal Basis	Open All Year
B&Bs and Guest Houses	4	96
Inns/ Pub Accommodation	0	100
Self-Catering	10	90
Touring Caravan and Camping Sites	70	30

5. Recent and Planned Investment

5.1. Expansion in the Last 3 Years

A fifth of pub accommodation, self-catering and touring caravan and camping businesses reported that they have expanded in the last 3 years e.g. a number of inns have opened additional guest bedrooms, some self-catering businesses have added more letting units, and one touring caravan and camping site has added a glamping unit. Very few guest houses and B&Bs have expanded however.

TABLE 5: ACCOMMODATION BUSINESS EXPANSION IN THE LAST 3 YEARS

Type of Accommodation Business	% of Accommodation Businesses Interviewed	
	Expanded in the Last 3 Years	Not Expanded in the Last 3 Years
B&Bs and Guest Houses	4	96
Inns/ Pub Accommodation	20	80
Self-Catering	20	80
Touring Caravan and Camping Sites	20	80

5.2. Planned Investment in the Next 2 Years

The survey suggests that there is likely to be very little change in the National Park's guest house and B&B supply in the next 2 years in terms of the expansion, development and upgrading of existing guest houses and B&Bs. Pub accommodation businesses, touring caravan and camping site operators and some self-catering establishments are however planning investment. Examples include:

- Pub accommodation businesses upgrading the quality of their guest bedrooms and in some cases opening additional bedrooms;
- Self-catering establishments adding new letting units, potentially including log cabins, and in some cases opening new facilities for their guests, such as games rooms;
- Touring caravan and camping site operators upgrading toilet and shower blocks, opening site shops, developing new pitches and adding glamping units.

TABLE 6: ACCOMMODATION BUSINESS INVESTMENT PLANS IN THE NEXT 2 YEARS

Type of Accommodation Business	% of Accommodation Businesses Interviewed	
	Investment Planned in the Next 2 Years	No Investment Planned in the Next 2 Years
B&Bs and Guest Houses	0	100
Inns/ Pub Accommodation	40	60
Self-Catering	27	73
Touring Caravan and Camping Sites	70	30

5.3. Barriers to Investment

Securing planning permission was identified as the most significant barrier for those accommodation businesses that are contemplating future expansion and development plans. This is seen as a particular problem for touring caravan and camping sites and self-catering businesses. A number accommodation operators also commented that they have previously been refused planning permission for projects that they had wanted to progress to improve and develop their business and meet demand that they are not currently able to satisfy. Others commented about their business being held back by planning and about the length of time that it takes to secure planning permission and the amount of paperwork involved.

Securing funding was the only other barrier that some accommodation business owners identified to progressing expansion, development and upgrading plans.

TABLE 7: BARRIERS TO EXPANSION, DEVELOPMENT AND UPGRADING PLANS

Type of Accommodation Business	% of Accommodation Businesses Planning Investment Citing This Barrier		
	Getting Planning Permission	Financing the Project	Other
Inns/ Pub Accommodation	33	17	17
Self-Catering	63	13	0
Touring Caravan and Camping Sites	86	43	0

6. Occupancy Levels, Trends and Future Prospects

6.1. 2013 Occupancy Levels

Occupancy levels were strong in 2013 for self-catering accommodation businesses, with 70% of interviewed self-catering operators reporting an occupancy of over 60% and 37% trading at occupancies in excess of 70%. In our experience these findings show a self-catering sector in the South Downs that is trading at above average levels of occupancy. Self-catering businesses typically trade at occupancies of 40-70%. Occupancies are generally stronger in the South East, more typically running at 60-70%, with some establishments trading at over 80%. The survey results thus show a comparatively strong self-catering sector in the South Downs.

TABLE 8: OCCUPANCY LEVELS 2013

Type of Accommodation Business	% of Accommodation Businesses Interviewed Reporting This Occupancy Level					
	Above 70%	61-70%	51-60%	41-50%	31-40%	Under 30%
B&Bs and Guest Houses	16	12	32	32	8	0
Inns/ Pub Accommodation	33	13	33	13	7	0
Self-Catering	37	33	17	3	10	0
Touring Caravan and Camping Sites	30	30	10	0	30	0

Occupancy levels were also good for pub accommodation businesses (with 79% of such businesses surveyed reporting an occupancy of at least 50%), and touring caravan and camping sites (70% trading at an occupancy of over 50%). A significant minority (30%) of touring caravan and camping sites reported occupancy levels of under 40%. These are sites that operate on a seasonal basis. There is no comparative data to judge how well these types of accommodation are performing in the South Downs, but from our knowledge of visitor accommodation performance we feel that these figures are an indicator of strong demand for these forms of visitor accommodation in the National Park.

Guest house and B&B performance is not as strong as for other types of accommodation and is much more variable. This is typical of this type of accommodation. As lifestyle businesses, occupancies often vary significantly depending on the personal circumstances and business ambitions of owners.

According to Visit England's England Occupancy Survey the average annual room occupancy for guest houses in England was 54% in 2013, while the average annual room occupancy for B&Bs was 49%. With 60% of the B&Bs and guest houses that we interviewed in the South Downs reporting annual room occupancies of over 50% these types of accommodation are generally trading at comparatively strong occupancy levels in the National Park compared to these national norms.

6.2. Occupancy Trends 2012-2014

Occupancy levels have generally increased or stayed the same for all types of visitor accommodation over the last 3 years. Pub accommodation operators reported the strongest growth in occupancies. For newly opened pub accommodation businesses this was because their business has built since opening. Touring caravan and camping sites have also seen an improvement in their occupancy levels. Self-catering occupancy performance has remained more stable, with many self-catering accommodation businesses maintaining high levels of occupancy.

TABLE 9: OCCUPANCY TRENDS 2012-2014

Type of Accommodation Business	% of Accommodation Businesses Interviewed Reporting a Change in Occupancy in the Last 3 Years			
	An Increase	No Change	A Decrease	Don't Know
B&Bs and Guest Houses	44	36	20	0
Inns/ Pub Accommodation	80	13	0	7
Self-Catering	30	63	7	0
Touring Caravan and Camping Sites	50	30	10	10

6.3. Future Prospects

Looking forward pub accommodation operators are particularly optimistic about the prospects for growth in their occupancy levels in the next 3 years. A number of touring caravan and camping site owners and some self-catering accommodation providers also see potential to increase their occupancies. B&B and guest house owners generally expect occupancy levels to be more stable. Most are happy with the levels of business that they are already getting and are not particularly looking to increase their occupancy levels.

TABLE 10: OCCUPANCY PROSPECTS 2015 -2018

Type of Accommodation Business	% of Accommodation Businesses Interviewed Expecting a Change in Occupancy in the Next 3 Years			
	An Increase	No Change	A Decrease	Don't Know
B&Bs and Guest Houses	12	60	12	16
Inns/ Pub Accommodation	93	7	0	0
Self-Catering	40	40	3	17
Touring Caravan and Camping Sites	60	10	0	30

6.4. Reasons for Changes in Occupancy Performance

Reasons cited for historic and anticipated future growth in occupancy levels were as follows:

- The establishment of the South Downs as a National Park;
- Increased/ improved marketing, particularly in terms of internet marketing and the use of online travel agents such as booking.com and LateRooms;
- Good weather;
- The economic recovery;
- The growth of the staycation;
- Increasing demand for weekend breaks from the London market;
- Growing demand from walkers and cyclists;
- An increase in demand from people attending weddings;
- Growth in demand from contractors working on construction projects in the area;
- Upgrading/ an improved product;
- Good reviews on Tripadvisor;
- Repeat business;
- A new business, so demand still building;
- An increase in last minute bookings;
- The increased popularity of camping.

Reasons cited for no change in occupancy levels were:

- Already trading at full capacity, so no scope to increase occupancies;
- Getting as much business as want.

Reasons cited for decreases in occupancy levels were:

- Taking less business as nearing retirement or due to illness or personal circumstances;
- Reduced marketing, including less use of online travel agents because of the commission that they charge on bookings;
- The economic recovery resulting in more people going abroad for their holidays;
- The recession;
- Fewer overseas tourists as a result of the strength of the pound;
- Insufficient marketing of the South Downs as a destination.
- More competition.

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

The survey findings show clear evidence of frequent shortages of all forms of visitor accommodation at weekends (Friday and Saturday nights) between April and October and during the week in the peak summer months (June to early September). The most frequent shortages during these times are for inns/ pub accommodation and self-catering. Shortages of B&B and guest house accommodation and touring caravan and camping provision are more common at weekends than during the week.

Some pub accommodation businesses and self-catering establishments and a few B&Bs and guest houses also often trade at full capacity during the winter months, both at weekends and during the week. The majority of accommodation establishments interviewed, and in particular touring caravan and camping sites, have spare capacity during the winter however.

These findings point to a need for additional provision of all types of visitor accommodation to meet peak time shortages during the summer, but a need for supply growth to be incremental to avoid diluting business in the winter months.

TABLE 11: WEEKEND (FRIDAY/SATURDAY) OCCUPANCY APRIL - OCTOBER

Type of Accommodation Business	% of Accommodation Businesses Interviewed Trading at Full Capacity				
	Every Weekend	Most Weekends	Some Weekends	Not Many weekends	No Weekends
B&Bs and Guest Houses	36	48	8	8	0
Inns/ Pub Accommodation	60	40	0	0	0
Self-Catering	30	53	17	0	0
Touring Caravan and Camping Sites	40	20	30	0	10

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

Type of Accommodation Business	% of Accommodation Businesses Interviewed Trading at Full Capacity				
	Every Weekend	Most Weekends	Some Weekends	Not Many weekends	No Weekends
B&Bs and Guest Houses	0	8	56	36	0
Inns/ Pub Accommodation	20	33	40	7	0
Self-Catering	7	20	47	27	0
Touring Caravan and Camping Sites	0	0	20	0	80

TABLE 13: MIDWEEK OCCUPANCY -PEAK SUMMER MONTHS (JUNE - EARLY SEPTEMBER)

Type of Accommodation Business	% of Accommodation Businesses Interviewed Trading at Full Capacity				
	Most of the Time	Quite Often	Occasionally	Not Very Often	Not At All
B&Bs and Guest Houses	24	32	28	16	0
Inns/ Pub Accommodation	53	40	7	0	0
Self-Catering	63	27	10	0	0
Touring Caravan and Camping Sites	10	30	20	20	20

TABLE 14: MIDWEEK OCCUPANCY - WINTER MONTHS

Type of Accommodation Business	% of Accommodation Businesses Interviewed Trading at Full Capacity				
	Most of the Time	Quite Often	Occasionally	Not Very Often	Not At All
B&Bs and Guest Houses	0	4	32	56	8
Inns/ Pub Accommodation	13	13	53	20	0
Self-Catering	17	13	43	27	0
Touring Caravan and Camping Sites	0	0	20	0	80

8. Key Markets and Their Future Growth Potential

8.1. Key Markets for South Downs Accommodation Businesses

Tables 15- 18 overleaf provide a breakdown of the importance of different visitor markets for each type of accommodation. Key conclusions from these tables are as follows:

- The key market for all types of visitor accommodation in the South Downs is people coming for short breaks.
- People attending weddings and family parties are another key market for B&Bs/guest houses, inns/pub accommodation businesses, and to a slightly lesser extent self-catering properties and touring caravan and camping sites.
- People coming for long holidays (of a week of longer) are a key market for self-catering businesses and some touring caravan and camping sites, but are of less or no importance to B&Bs/guest houses and inns/pub accommodation businesses.
- Overseas tourists are an important market for all categories of accommodation.
- Walkers on the South Downs Way are a reasonably important market for all types of visitor accommodation business.
- People stopping off en-route to the West Country are a market for some B&Bs/guest houses and inns/pub accommodation businesses but are of only slight or no importance for the majority of self-catering operations and touring caravan and camping sites.
- Business visitors are a strong market for inns/pub accommodation establishments, a secondary market for some B&Bs/guest houses and self-catering businesses, but of little or no importance to touring caravan and camping site operations.
- Contractors and workmen are a market for some B&Bs/guest houses, inns/pub accommodation businesses and self-catering establishments, but are of little or no importance to touring caravan and camping sites.

TABLE 15: KEY MARKETS FOR B&BS AND GUEST HOUSES

Visitor Market	% of Accommodation Businesses Interviewed Indicating This Rating			
	Very Important	Quite Important	Slightly Important	Not At All Important
People coming to stay for a short break	48	44	4	4
People coming for a longer holiday (1 week +)	0	24	32	44
People stopping off en-route to the West Country	16	44	24	16
Overseas tourists	28	64	8	0
Walkers on the South Downs Way	24	56	16	4
People attending weddings and family parties	56	36	4	4
Business visitors	20	44	24	12
Contractors and workmen	16	28	40	16

TABLE 16: KEY MARKETS FOR INNS & PUB ACCOMMODATION

Visitor Market	% of Accommodation Businesses Interviewed Indicating This Rating			
	Very Important	Quite Important	Slightly Important	Not At All Important
People coming to stay for a short break	60	40	0	0
People coming for a longer holiday (1 week +)	20	13	33	33
People stopping off en-route to the West Country	0	47	27	27
Overseas tourists	20	73	7	0
Walkers on the South Downs Way	40	33	13	13
People attending weddings and family parties	73	20	7	0
Business visitors	73	20	7	0
Contractors and workmen	27	47	13	13

TABLE 17: KEY MARKETS FOR SELF-CATERING ACCOMMODATION BUSINESSES

Visitor Market	% of Accommodation Businesses Interviewed Indicating This Rating			
	Very Important	Quite Important	Slightly Important	Not At All Important
People coming to stay for a short break	43	27	27	3
People coming for a longer holiday (1 week +)	80	13	3	3
People stopping off en-route to the West Country	17	0	40	43
Overseas tourists	57	33	10	0
Walkers on the South Downs Way	43	17	30	10
People attending weddings and family parties	33	37	20	10
Business visitors	27	20	27	27
Contractors and workmen	17	13	13	57

TABLE 18: KEY MARKETS FOR TOURING CARAVAN & CAMPING SITES

Visitor Market	% of Accommodation Businesses Interviewed Indicating This Rating			
	Very Important	Quite Important	Slightly Important	Not At All Important
People coming to stay for a short break	100	0	0	0
People coming for a longer holiday (1 week +)	50	20	20	10
People stopping off en-route to the West Country	0	10	40	50
Overseas tourists	10	60	30	0
Walkers on the South Downs Way	20	40	30	10
People attending weddings and family parties	20	40	30	10
Business visitors	0	0	30	70
Contractors and workmen	0	0	60	40

8.2. Potential Growth Markets for the Future

The markets seen as offering the strongest growth potential for B&Bs/guest houses, inns/pub accommodation establishments and touring caravan and camping sites are short breaks, overseas tourists, walkers on the South Down Way and people coming for weddings and family parties. Some self-catering operators also see these markets as offering growth potential. Key growth markets for self-catering businesses are seen as long holidays and overseas tourists. Long holidays were also identified as a growth market by the majority of touring caravan and camping sites interviewed. Business visitors and contractors/workmen were seen as a growth market for many inns and pub accommodation businesses, but identified as growth markets by much smaller proportions of B&Bs/guest houses, self-catering businesses and touring caravan and camping sites.

TABLE 19: GROWTH MARKETS FOR SOUTH DOWNS ACCOMMODATION BUSINESSES

Visitor Market	% of Accommodation Businesses Interviewed Identifying This Market as Offering Growth Potential			
	B&Bs/ Guest Houses	Inns/ Pub Accom	Self-Catering Businesses	Touring Caravan & Camping Sites
People coming to stay for a short break	76	93	33	100
People coming for a longer holiday (1 week +)	12	27	53	80
People stopping off en-route to the West Country	20	27	17	20
Overseas tourists	40	80	53	60
Walkers on the South Downs Way	60	80	30	50
People attending weddings and family parties	48	73	33	60
Business visitors	31	80	20	10
Contractors and workmen	29	60	17	40

APPENDIX 6

SOUTH DOWNS VISITOR ACCOMMODATION REVIEW

SURVEY OF LARGER VISITOR ACCOMMODATION BUSINESSES

KEY FINDINGS

Hotels

We interviewed and/or obtained up-to-date performance data for the following hotels across the National Park:

- Premier Inn Arundel
- Premier Inn Petersfield
- Spread Eagle, Midhurst
- Park House Hotel, Bepton
- Norfolk Arms, Arundel
- White Swan, Arundel
- The Shelleys. Lewes
- White Hart, Lewes
- Deans Place Hotel, Alfriston

Budget Hotels

Budget Hotel Performance and Markets

The National Park's two branded budget hotels at Petersfield and Arundel achieve very high room occupancies (well in excess of 80% in 2014) and strong average room rates that are ahead of the values that budget hotels typically report. Both hotels are frequently fully booked from Monday through to Saturday and have to turn business away on these nights for most of the year, other than in January and February. Sunday is their only quieter night. They attract a mix of business visitors and contractors during the week, together with some midweek leisure guests. Key markets at weekends are people attending weddings and family parties or visiting friends and relatives, together with some weekend break guests and occasionally people attending major events in the area including the Goodwood Festival of Speed and Revival and Shoreham Airshow.

The Potential for Budget Hotel Development in the National Park

These findings show potential for additional budget hotel provision in Petersfield and Arundel, either through the expansion of the existing budget hotels in these locations or possibly the development of second budget hotels. The strong performance of these two budget hotels also suggests market potential for a budget hotel in Lewes, as a similar sized town to Petersfield. Midhurst, Petworth and Alfriston are however too small to support the development of budget hotels, we would suggest.

3 Star Hotels

3 Star Hotel Performance

The 3 star hotel market in the South Downs National Park is largely leisure-driven and seasonal. Weekend occupancies and achieved room rates[2] are strong, especially in the summer. Midweek demand is weaker, more seasonal and more price-driven, particularly in the winter.

3 star hotel performance differs according to the quality of hotels. The National Park's high quality, boutique and country house 3 star hotels trade at relatively low room occupancies (typically 50-60% in 2014) but very high achieved room rates (significantly above £100 in most cases). The lower grade 3 star hotels in the National Park achieve higher room occupancies (generally in excess of 70% in 2014) by driving business through the online travel agents (e.g. booking.com, LateRooms, Trivago) and daily deals sites (e.g. roupon, Wowcher, Living Social, Travelzoo) at highly discounted room rates, particularly in the winter. This results in them achieving much lower average room rates, typically around £60 in 2014, although as low as £45 for one hotel. To set these figures in context, the national average achieved room rate for UK provincial 3/4 star chain operated hotels is currently running at £75.51, as at October 2014.

Average annual room occupancies and achieved room rates have improved for most of the National Park's 3 star hotels over the last 3 years, as the economy has strengthened and as hotels have improved their marketing. Achieved room rates dropped for one hotel that has driven more business on lower rates through online travel agents to improve its occupancy levels.

[2] The net price that hotels achieve per room sold after deduction of VAT, breakfast and other meals if included in the price, commission charges and discounts.

Friday and Saturday occupancies are very strong for all of the National Park's 3 star hotels, particularly between April and October, when hotels consistently fill and turn business away on Saturday nights, and also frequently on Friday nights. Friday and Saturday occupancies also remain strong for most hotels during the winter, although they fill and deny Friday and Saturday night bookings much less frequently at this time of year.

Midweek occupancies and achieved room rates are strong for hotels in Lewes and Alfriston during the Glyndebourne Season between May and August and can be strong for some hotels in Lewes and Midhurst that attract shooting parties between August and December. Midweek occupancies are otherwise generally much lower (typically around 30-50% in 2014)for the National Park's 3 star hotels and can be very low in the winter. Midweek business is also more price driven, particularly in the winter months.

Sunday occupancies are generally low throughout the year, but not quite as low as midweek occupancies can be.

Midweek Markets

The key midweek markets for the National Park's 3 star hotels are leisure break guests and business visitors.

Hotels with spas attract good demand for midweek spa breaks. Lower quality 3 star hotels drive midweek leisure break business primarily on price through online travel agents and in some cases daily deals sites. Some hotels offer highly discounted room rates through these channels during the winter. Midweek break guests tend to be post-family and retired couples.

Business visitors are either doing business in the National Park's key towns (Petersfield, Midhurst and Lewes) or in the surrounding towns and cities (Winchester, Chichester, Worthing, Brighton and Eastbourne). Business demand is relatively weak. This is a key factor behind the low midweek occupancies that National Park 3 star hotels achieve, especially during the winter months when it is more difficult to attract leisure break customers.

The National Park's high quality 3 star, boutique and country house hotels attract some residential conference business from London-based companies. This market declined substantially during the recession but is slowly starting to recover.

From mid August to December high quality 3 star, boutique and country house hotels in Lewes and Midhurst attract midweek business from shooting parties.

Contractors and workmen are a significant secondary midweek market for one lower quality 3 star hotel.

Hotels in Lewes occasionally attract midweek business from delegates attending major conferences in Brighton.

One lower quality 3 star hotel takes some midweek group tours. Most of the National Park's 3 star hotels are too small to cater for this market. It also provides very low-rated business that hotels do not generally want unless it can help them to boost off-peak periods.

Midweek weddings are a minor source of business for some of the National Park's 3 star hotels.

Weekend Markets

Key weekend markets are either wedding guests or people coming for weekend breaks.
Most of the National Park's 3 star hotels focus primarily on weddings business during the summer months, often to the exclusion of weekend break bookings that are generally denied. A few hotels concentrate more on weekend break business, with weddings being a lesser, secondary source of weekend business. All hotels focus more on the weekend break market in the winter, when fewer weddings are held.

Weekend break customers are generally younger than those that come for midweek breaks. A key motivation for weekend breaks is walking and cycling in the South Downs. Some customers come specifically to stay in one of the National Park's high quality 3 star, boutique or country house hotels, with the hotel acting very much as the destination. Hotels with spas attract strong demand for weekend spa breaks. Weekend break business tends to be largely deal driven during the winter.

Overseas tourists are a secondary weekend market for a number of hotels.

Hotels in Lewes and Midhurst attract weekend shooting parties between August and December.

One lower quality 3 star hotel takes some weekend group tours.

Key events that generate strong demand for nearby hotels in the National Park are as follows:

- Goodwood Festival of Speed
- Goodwood Revival
- Glorious Goodwood
- Glyndebourne Festival
- Lewes Bonfire Celebrations
- Charleston Festival
- Veuve Cliquot Gold Cup, Cowdray Park
- Pony Club Championships, Cowdray Park
- Brighton Pride

Denied Business

In terms of denied business most of the National Park's 3 star hotels consistently turn business away at weekends, on Saturdays throughout the year and Fridays between April and October. Hotels that focus primarily on weddings during the summer cannot always accommodate all of the wedding guests and usually turn away weekend breakbookings because they are already fully booked with weddings parties.

Hotels in Lewes deny midweek business during the Glyndebourne Festival between May and August. Festival goers typically book a year in advance once they know which operas they will be coming to see in the following year. Midweek denials are otherwise rare for hotels in the National Park.

Future Prospects

Most of the managers of the National Park's 3 star hotels are optimistic about the **future prospects** for their hotel. The majority expect to see a further improvement in both occupancy and achieved room rate performance in 2015, with growth expected in terms of leisure break business and recovery and renewed growth anticipated in the local business market and residential conference business coming from London-based companies, as the economy continues to strengthen.

One lower quality 3 star hotel is caught in a downward cycle of only being able to charge low room rates because of the poor quality of the hotel, leaving it unable to generate sufficient profit for investment in renewal and modernisation to allow the hotel to achieve higher prices and have a sustainable future.

Hotels in Lewes are concerned about the prospect of a Premier Inn opening in the town, to the point of threatening the continued operation of one hotel.

Future Investment Plans

A number of the National Park's hotels have plans for **future investment**:

- The Norfolk Arms is currently undergoing a complete refurbishment under its new owners (St James Hotels) that will see it raised to a 4 star standard.
- Two other hotels have plans for bedroom refurbishment in 2015.
- The White Swan at Arundel has planning permission for a 22-bedroom extension.
- The Holiday Inn Winchester has planning permission for an additional 36 bedrooms, gym/leisure facilities and meeting rooms.

The Potential for 3 Star Hotel Development in the National Park

The clear priority in terms of 3 star hotel development in the National Park is investment in the lower quality 3 star hotels to enable them to achieve higher room rates at peak times and increased profits to allow ongoing reinvestment. The seasonal nature of the hotel market in the National Park and lack of corporate demand means that hotels need to achieve high room rates at weekends and during the peak summer months, when demand is at its strongest. This requires them to be of a sufficiently high standard, which may require a substantial investment in a hotel that is currently of a low standard. While this can be a challenge for owners, there is evidence of this now happening, with the new owners of the Norfolk Arms in Arundel currently investing in a full refurbishment of the hotel to take it to a 4 star standard. There is therefore a case for seeking to retain existing lower quality hotels that might attract investment under existing or new owners. This may require consideration of some form of enabling development, e.g. partial conversion to an alternative use, to generate the capital required to transform a poor quality hotel.

There may also be potential for small-scale bedroom extensions to allow existing hotels to cater more fully for weekend and peak season demand. Significant bedroom extensions are unlikely to be warranted however due the seasonal nature of the National Park hotel market and the lack of midweek demand. Significantly enlarged hotels would thus have a greater number of empty bedrooms during the week and in the winter.

The other opportunity for the development of existing hotels is in terms of additional facilities to generate new income streams and improve profitability and viability. Thiscould be in terms of function rooms to allow hotels to cater more fully for weddings business, expanded or new restaurants, and leisure and spa facilities to enhance appeal for short breaks, particularly during the winter.

Holiday Cottage Complexes

We interviewed the following 7 holiday cottage complexes across the National Park:

- Inadown Farm Holiday Homes, Selborne, Hampshire (5 letting units - 4 star)
- Avington Holidays, Avington, Winchester (2 letting units - 5 star)
- Byre Cottages, Storrington, Pulborough (5 letting units - 3/4 star + outdoor swimming pool)
- Wallops Wood, Droxford, Hampshire (5 letting units - 4 star)
- Cowdray Park, Midhurst (5 letting units - 4 star)
- Newtimber Holiday Cottages (3 letting units - 4 star)
- Caburn Cottages, Glynde, Lewes (9 letting units - 3 star)

Six of these holiday cottage complexes have achieved occupancies of at least 75-80% in 2014. All of the complexes attract strong demand for full week lets during school holiday periods, in May, June and September and over the Christmas and New Year period. They also attract good demand for weekend lets throughout most of the rest of the year, together with some midweek short lets and some long lets in the winter. Midweek demand tends to be lower in the shoulder months and is very low for some complexes during the winter. A number of holiday cottage complex owners advised us that they are prevented from taking long winter lets as their planning permission stipulates a maximum let of 28 days.

Holiday cottage complexes are often fully booked and turning business away between April and October, and over the Christmas and New Year period. Weekend denials are frequent. Holiday cottage complexes also have to refuse full week bookings in the school holidays. Denials are also significant for Goodwood events.

Key markets for holiday cottage complexes in the South Downs are as follows:

- 1/2 week holidays;
- Weekend and midweek breaks;
- Overseas tourists - generally a strong market for holiday cottage complexes in the National Park, with demand strongest from the French, German, Dutch and Australian markets.

Other markets are:

- Family and friend get-togethers and celebrations;
- Wedding parties;
- Hen parties;
- People visiting friends and relatives.

Markets that require long lets in the winter are:

- People working in the area;
- People moving house;
- People requiring temporary accommodation while work is being undertaken on their house.

A number of the holiday cottage complex owners that we spoke to indicated future plans that they would like to progress in terms of:

- The development of additional letting units through further barn conversions;
- The addition of leisure facilities;
- A holiday lodge development;
- The development of a camping barn.

The Potential for Further Holiday Cottage Complexes in the National Park

The high levels of occupancy that existing holiday cottage complexes are achieving in the National Park suggests good potential for the development of further high quality holiday cottage complexes in the South Downs, especially with some form of leisure facilities.

Touring Caravan & Camping Sites

We were unfortunately not able to speak to any of the larger, seasonally operated touring caravan and camping sites in the National Park as they had closed for the season by the time of our survey of larger visitor accommodation businesses. The findings of the previous research that we have undertaken into the market demand for touring caravan and camping provision in Lewes, Wealden and Rother Districts in East Sussex suggest the following in terms of the likely demand for touring caravan and camping sites across the National Park:

- Demand will undoubtedly be highly seasonal and weather dependent.
- Most sites are likely to be fully booked and turning business away during the Easter weekend, May Bank Holiday weekends and weekends in July and August when the weather is good.
- Weekend pitch occupancies are also likely to be high between March and June and in September and October and sites may well also be filling and turning business away at these times, depending on the weather.
- The few sites that remain open all year are likely to be achieving low pitch occupancy levels at weekends in the winter.
- Midweek demand will be strong during July and August but sites will generally have midweek capacity in these months.
- Midweek pitch occupancies will be lower during the shoulder season months (probably no more than about 50%) and very low at the beginning and end of the season and during the winter for any sites that are open all year, other than possibly over the Christmas and New Year period.
- The main market for touring caravan and camping sites across the National Park is likely to be people coming to stay for weekend breaks. This is likely to be a relatively local market, with a lot of these customers coming from East and West Sussex, Hampshire, Surrey, Kent and London. Many sites will have a regular clientele from these areas that will come for several weekends during the year.

- Secondary markets will be:
  - Caravanners and campers coming for midweek breaks, again from these core catchment areas.
  - 1/2 week family holidays during school holiday periods.
  - People on touring holidays stopping off for a night or two.
  - Overseas caravanners and campers stopping off as part of a touring holiday or while en-route to or from the West Country. Key nationalities will be Dutch, German, French and Belgian.
  - People attending events in the area including Glyndebourne, Lewes Bonfire, Brighton Festival, Brighton Pride, Goodwood events, and Airbourne at Eastbourne.
  - Walkers and cyclists on the South Downs Way - for those sites that are on, or close to the National Trail.
  - People visiting friends and relatives in the area.
  - People attending weddings or other family occasions.

- Other markets that touring caravan and camping sites may be attracting include:
  - Youth groups e.g. Duke of Edinburgh Award groups, scout groups.
  - Caravan club, camper van and motor home rallies.
  - Contractors and workmen working on projects in the area.
  - People attending conferences at Brighton.

Demand for touring caravanning, and especially camping has generally increased during the recession as people have opted for lower cost holidays and stayed in the UK rather than going aboard - the so-called 'staycation' trend. There is no reason to think that these trends have not been seen in the National Park.

The studies that we have undertaken in Lewes, Wealden and Rother all showed strong demand for seasonal tourer pitches (where customers leave their touring caravan on a pitch for the season for use as and when they want to during the season), and generally a shortage of such pitches to meet such demand.

The Potential for the Development of Touring Caravan and Camping Sites in the National Park

These findings suggest that the priority moving forward will be ongoing investment in the upgrading of existing touring caravan and camping sites in the National Park. There may also be scope small-scale extensions to some sites, where they have land to do so, to meet demand at peak times.

The highly seasonal nature of the touring caravan and camping market is likely to make it difficult to achieve commercially viable propositions for new large-scale touring caravan and camping sites in the National Park, given the level of investment that would be required in site infrastructure. Large new sites are most commonly developed by the Caravan Club and Camping and Caravanning Club. They are driven more by a desire to increase the choice of sites that they can offer to their members than by fully commercial considerations, so will often develop sites when commercial operators would not be able to make them stack up. Both clubs are already well represented in and around the South Downs and have not interested currently in looking at developing new sites in the National Park.

Group and Youth Accommodation

We interviewed the following group and youth accommodation establishments:

- YHA South Downs
- YHA Truleigh Hill
- YHA Alfriston
- Slindon Basecamp
- Gumber Bothy Camping Barn
- Wetherdown Lodge @ The Sustainability Centre, East Meon
- Rookesbury Park Activity Centre

These group and youth accommodation establishments reported high levels of occupancy between March and October, both during the week and at weekends. Weekend demand is particularly strong during these months, with most establishments frequently fully booked and having to turn weekend business away at these times of year. Midweek demand is also strong and establishments can fill and turn business away in the week, especially in the peak summer months.

Key markets at weekends and weekdays during the peak summer months are individuals, families and groups walking or cycling the South Downs Way or walking and cycling elsewhere in the area.

Midweek demand during the shoulder season months is predominantly in terms of school groups, both from the UK and near Europe, including DoE groups.

Weekend demand remains strong throughout the year. Some establishments focus on exclusive use bookings for family and friend get-togethers and celebration weekends during the winter. They do particularly well with this market for the Christmas and New Year period.

Midweek demand is much lower during the winter. Some establishments attract corporate groups for team building courses and see scope to further develop this market to help generate winter bookings.

Occupancy levels have generally increased in the past 3 years for most of the group and youth accommodation businesses that we interviewed in the National Park. Managers attribute the improvement in their occupancy performance to a number of factors:

- The recession, resulting in more people looking for lower-cost holiday options;
- Improved marketing;
- Good weather in the last two summers;
- Increasing demand for family and friend get-togethers.

The group and youth establishment managers that we interviewed were all positive about the future prospects for their establishment in 2015 in terms of either maintaining or increasing their occupancy levels next year.

The Potential for the Future Development of Group & Youth Accommodation in the National Park

Our discussions with the managers of group and youth accommodation establishments in the National Park show a strong market for these types of accommodation in the South Downs and evidence of shortages of such accommodation at weekends and during the peak summer months. This suggests a need to seek to retain existing group and youth accommodation provision in the National Park, which may be difficult to replace if lost to an alternative use. This may present a challenge for older properties that may need substantial investment to bring them up to modern standards.

Our research suggests market demand for additional provision in the National Park, and especially along the South Downs Way, in terms of modern hostel/bunkhouse accommodation and camping barns. It can however be difficult to make investment in such low-cost forms of accommodation stack up, particularly where the conversion of redundant agricultural buildings is involved.

APPENDIX 7

SOUTH DOWNS VISITOR ACCOMMODATION STUDY

SUMMARY OF FINDINGS OF THE LAND & PROPERTY OWNER SURVEY

1. Purpose of the Survey

The purpose of the survey of land and property owners across the South Downs National Park was to identify interest in developing any form of visitor accommodation, and intent to do so. In a sensitive rural landscape such as the South Downs National Park, the availability of sites for any form of development will be at a premium. The aspirations of land and property owners will therefore be important in opening up opportunities for visitor accommodation development. The survey also attempted to probe a little deeper in terms of identifying barriers to making visitor accommodation development happen and support sought which could provide a valuable input to any forward action planning.

2. Methodology and Sample

The survey was undertaken via Survey Monkey, an online survey tool. Land and property owners were sent an email by NFU, CLA and the South Downs Land Managers group who all have databases of land and property owners and managers in the South Downs. The email explained the purpose of the survey and the wider visitor accommodation research project, and directed the recipients via a link to the questionnaire for them to complete. It is not clear how much overlap there was between the databases as the consultancy team has not had access to these. It is estimated that around 500 contacts were sent the invitation to participate. A total of 55 responses were received.

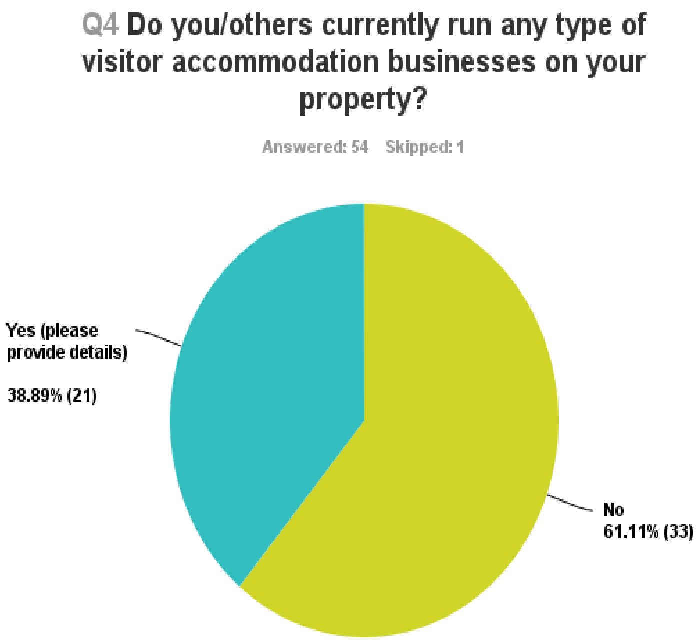
The questionnaire can be found at Annex A.

Full responses to open ended questions can be sound at Annex B.

3. Current Involvement with Visitor Accommodation

39% of respondents currently have some form of visitor accommodation business on their property, either run by themselves or others e.g. tenants or managing agents. These varied from small B&Bs and individual holiday cottages to high quality self-catering complexes and a branded contemporary camping operation.

Figure 1



4. Plans to Develop Visitor Accommodation

61% of the sample indicated that they had plans to develop visitor accommodation. A number were considering multiple projects on different parts of their properties. The table below indicates the types of visitor accommodation that interest was expressed in. Projects included several innovative types of accommodation, including safari tents and shepherds huts, and some of the schemes e.g. the development of camping pods, referred to serving visitors walking the South Downs Way. Several of these proposals already have planning permission.

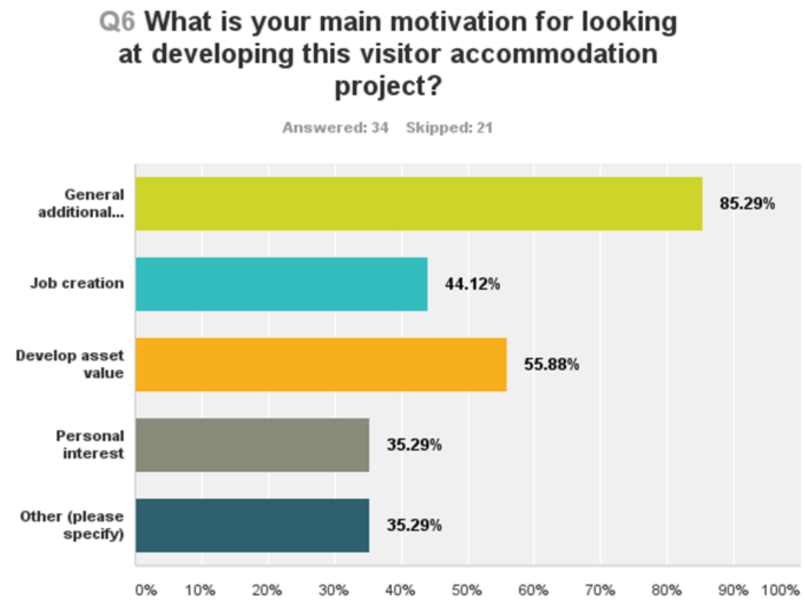
Table 1

Type of Visitor Accommodation to be Developed	No. of Responses
Country house hotel	1
Self-catering barn conversion	17
Timber holiday lodge development	8
Touring caravan and camping site	2
Camping site	2
Camping pod development	3
Glamping (luxury camping)	5
Bunkhouse barn	6
Activity holiday centre	2

5. Motivation for Developing Visitor Accommodation

The generation of additional income was by far the dominant motivation for looking at developing visitor accommodation, cited by over 85% of respondents. Developing asset value was the next strongest motivator (56%), followed by job creation (44%).

Figure 2.

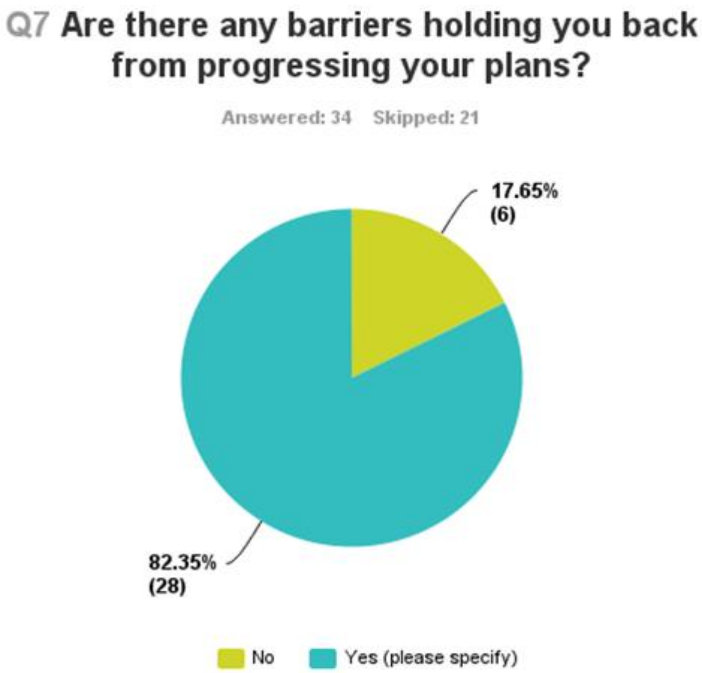


Other reasons quoted included the re-use of old buildings, providing an economic input to the surrounding village and services, catering for demand from other on site activities e.g. weddings, events and farm tours.

6. Barriers Holding Back the Development of Visitor Accommodation

Over 80% of respondents said that there were barriers holding them back from progressing their visitor accommodation development plans.

Figure 3



Planning and funding are the two principal barriers identified. The capital intensive nature of many of these developments and the high costs impacting on viability were particularly cited. Also mentioned were a lack of expertise, uncertainty about the strength of the market, and potential local opposition.

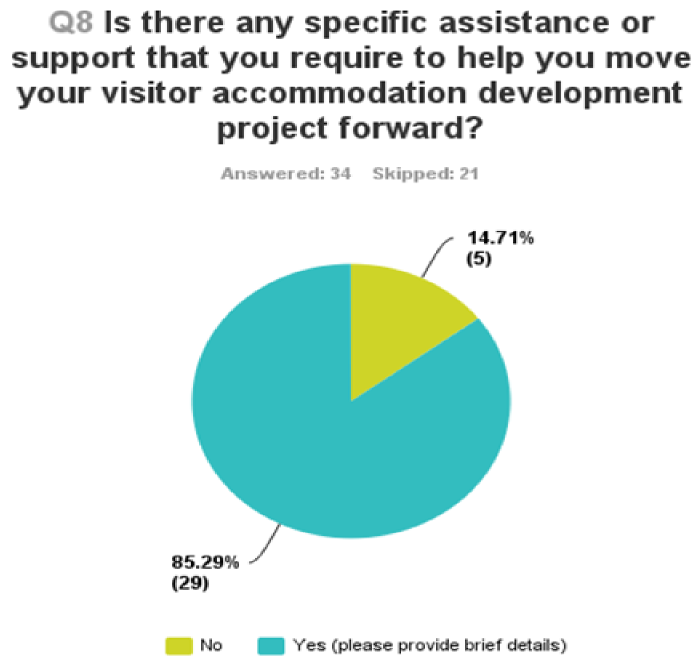
Table 2

Barriers to Developing Visitor Accommodation	% of Respondents Identifying Barriers Base: 34
Planning	56
Funding/viability	50
Expertise/market knowledge	6
Local opposition	3

7. Assistance & Support Required to Move Projects Forwards

85% of respondents said that they would like some assistance or support to help them move their visitor accommodation development project forward.

Figure 4



- Planning features large, with requirements for a more co-ordinated approach between officers and departments, greater clarity around what would be acceptable in planning terms, the opportunity for pre-application discussions at a low cost, more flexible and supportive planning policies and processes, and clearer articulation of the sorts of visitor accommodation development that the SDNP would like to see.

- Help with funding, most notably grants, was the second most sought after type of support, with several mentioning LEADER funding.

- A number of respondents said they would welcome more information on the market for different types of visitor accommodation and evidence of demand, by type of accommodation and location.

- More general advice was also being sought, for example relating to marketing of visitor accommodation, finding accommodation operators looking for opportunities and sites, and advice on the specification required for different types and standards of visitor accommodation.

- The need for some means to co-ordinate the interest in the provision of visitor accommodation along the South Downs Way also featured.

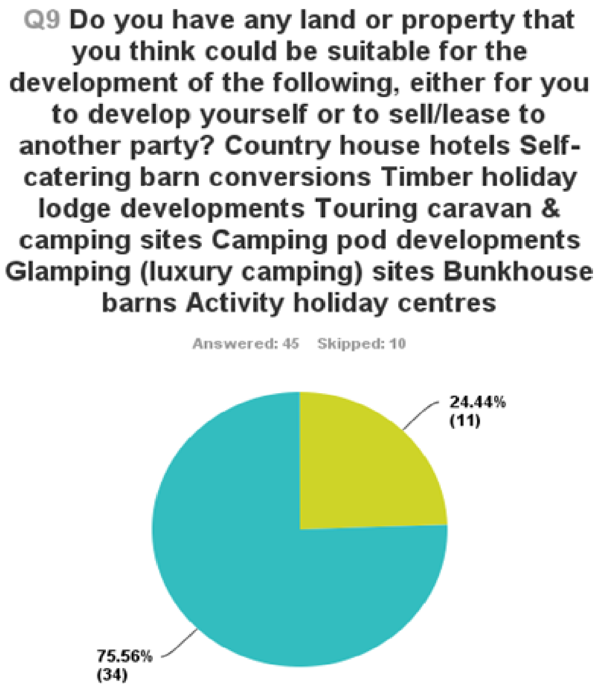
Table 3

Assistance Sought to Move Visitor Accommodation Projects Forwards	% of Respondents Identifying Need for Assistance Base:29
Planning support & clarity re what SDNP wants to see	52
Funding advice & grants	31
Market information	21
Other advice – marketing/operators/specifications	17
Co-ordinating development – South Downs Way	3

8. Land & Property to Put Forward for Visitor Accommodation Development

76% of those responding said they had land or property that would be suitable for visitor accommodation development.

Figure 5



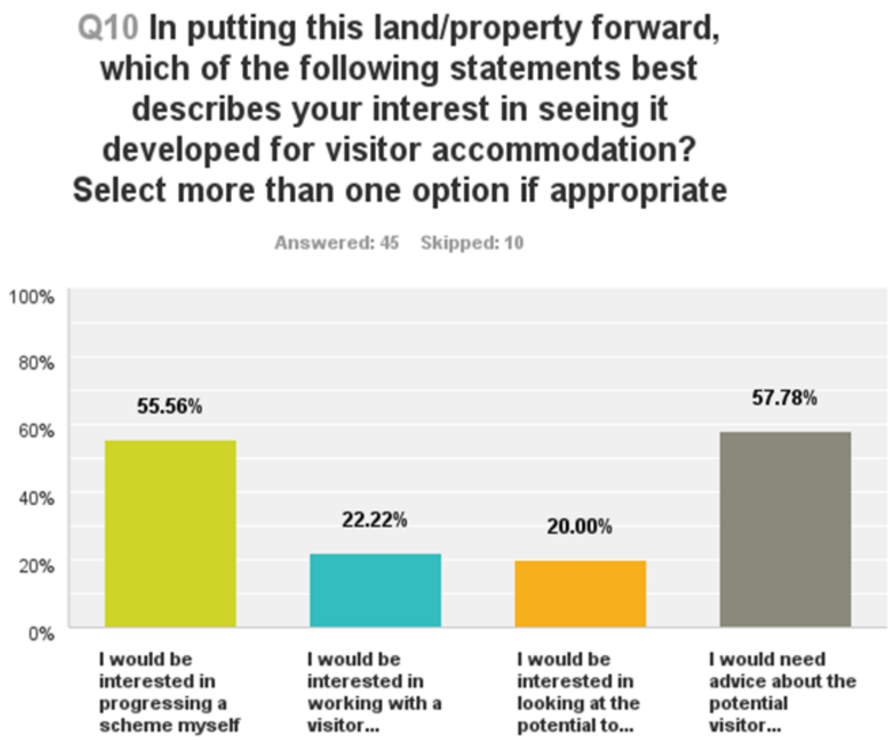
Further analysis of the response data is required to identify the location of these properties, and potentially to map them, as only 16 of the 34 provided their post codes. However, some additional research should enable the property name to be identified. This could provide a valuable input into thinking around a possible locational strategy for visitor accommodation development.

Linked to the above, Annex C details the South Downs Land Managers Group response to the Local Plan consultation on issues relating to visitor accommodation.

9. Basis of Interest in Developing Land/Property

Just over half the respondents were interested in progressing a visitor accommodation development scheme themselves, with 22% looking to work with specialist operators and a further 20% interested in looking at the potential to sell or lease the property to a suitable developer or operator. Nearly 60% of respondents indicated they would like advice about the potential development options.

Figure 6



ANNEX A

SOUTH DOWNS
TOURIST ACCOMMODATION STUDY
SURVEY OF LAND AND PROPERTY OWNERS

SDNPA has commissioned consultants Hotel Solutions to undertake a study looking at future needs for all forms of visitor accommodation across the National Park. The study will inform the development of the National Park Local Plan as well as the delivery of the Partnership Management Plan.
The availability of sites will be key to bringing new visitor accommodation development forwards in the SDNPA area, and with this in mind, we are contacting land and property owners across the National Park to test the potential level of interest in visitor accommodation development.
We would therefore be grateful if you could find the time to respond to the questions below, and thank you in anticipation of your feedback.

1. Name of Landholding/Property/Company: ______________________________
2. Contact Name: ____
3. Telephone Number/Email address: ____________________________________
4. Do you currently run or have on your property and run by others any type of visitor accommodation business?:

Yes	
No	

If yes, please provide brief details in the box below

5. The research undertaken to date suggests potential for further provision of the following types of visitor accommodation in the National Parkj:
    - Country house hotels
    - Self-catering barn conversions
    - Timber holiday lodge developments
    - Touring caravan & camping sites
    - Camping pod developments
    - Glamping (luxury camping) sites
    - Bunkhouse barns
    - Activity holiday centres

Are you currently considering any plans to develop any of these types of visitor accommodation?

Yes		
No		Go to Question 9

If yes, please provide brief details, including location, in the box below

6. What is your main motivation for looking at developing this visitor accommodation project?

Generate additional Income	
Job creation	
Develop asset value	
Personal interest	
Other (please specify in the box below)	

7. Are there any barriers holding you back from progressing your plans?

Yes	
No	

If yes, please provide brief details.

8. Is there any specific assistance or support that you require to help you move your visitor accommodation development project forward?

Yes	
No	

If yes, please provide brief details.

9. Do you have any land or property that you think could be suitable for the development of these types of visitor accommodation - either for you to develop yourself or to sel/leasel to another party?

Yes	
No	

If yes, please provide brief details of the land/ property – including postcode - and the type of visitor accommodation that you think it could be suitable for.

10. In putting this land/property forward, which of the following statements best describes your interest in seeing it developed for visitor accommodation? Tick more than one option if appropriate

I would be interested in progressing a scheme myself	
I would be interested in working with a visitor accommodation company to develop a scheme	
I would be interested in looking at the potential to sell or lease the land/property to a suitable accommodation developer/operator	
I would need advice about the potential visitor accommodation development options for the land/property	

Thank you for your responses

If you would like to discuss any specific ideas or opportunities with us please feel free to contact Lynn Thomason at Hotel Solutions
t. 01522 811255 e.lynn@hotelsolutions.org.uk

If you would like any further information about this survey or the wider South Downs Visitor Accommodation Needs Study, please contact Kat Hale, Sustainable Tourism Officer at SDNPA on t. 01730 819264 e. Katharine.hale@southdowns.gov.uk

ANNEX B

VERBATIM RESPONSES TO OPEN ENDED QUESTIONS

Q4. Do you/others currently run any type of visitor accommodation businesses on your property?
- Yes (please provide details)

- Embers Camping has developed a branded tent camping operation, offering a high-end, trustworthy product across a range of sites in the South East of England. Launched in 2013, with its first site in Beaulieu, New Forest, Embers Camping offers a contemporary yet traditional camping experience in stunning surroundings, staff on-site to assist guests and modern toilet and shower facilities. Following the success of its first campsite in Beaulieu, Embers opened a second campsite this year at the Bentley Wildfowl and Motor Museum near the South Downs National Park, East Sussex and will look to further expand its operation in 2015.
- Yes we are a Sussex based holiday letting agency with a large number of self catering accommodation within the park boundary which we market on behalf of owners
- B&B in East Tisted is a tenant of ours
- caravan club site, Also we have weddings and other events and they all can camp
- Holiday let cottage
- Three Holiday Cottages, all ensuite, currently let through English Country Cottages. One sleeps five persons, one sleeps four, the third is for two. All are self catering.
- B&B - 2 rooms. Certified caravan and camping club site.
- Self-catering holiday cottages
- Five self catering holiday cottages. Established 1990.
- Hundred Acres Farm Luxury Bed and Breakfast Caravan club Certified Location
- We run 2 Holiday Cottages with 2 bedrooms to bathrooms, kitchen and living room in each. Both Cottages sleep 4.
- We have a self-contained holiday accommodation apartment managed at present by Amberley House Cottages (in Pulborough)
- Bed and Breakfast and Camping
- Bed and Breakfast 4 double rooms of which 2 are en suite.
- B&B Self catering holiday let, annexe
- Touring Caravan site for 15 vans. No toilet or shower block. I am not sure what other details you would like. Please do contact me if you want to know more.
- Wallops Wood Cottges www.wallopswoodcottages.co.uk ; we have five high quality 4 star gold awarded holiday cottages with a total of 16 bedrooms sleeping 32 people.
- One of our farm tenants currently runs a camping and B&B operation at Buncton Manor Farm. Our tenants at Wiston House (Foreign and Commonwealth Office) use it for weddings and residential conferences.
- camp site people fishing ,and using other farm attractions caravan site cl site , mobile homes people using fishing and other farm attractions
- accommodation for Bridal Couple at wedding venue.

Q5. The research undertaken to date suggests potential for further provision of the following types of visitor accommodation in the national park: Country house hotels, Self-catering barn conversions, Timber holiday lodge developments, Touring caravan & camping sites, Camping pod developments, Glamping (luxury camping) sites, Bunkhouse barns, Activity holiday centres.

Are you currently considering any plans to develop any of these types of visitor accommodation?
If yes Please Provide Brief details.

- One to two bedroom accomadation around Glynde.
- Conversion of old brick stables into self contained holiday lets.
- We have planning in place for self catering barn conversion. 5 units but would consider bunk accom if more demand.
- Recently tried to get planning permission for holiday lodges and was turned down.
- We are looking to develop tent camping accommodation along or near the South Downs Way, so that hikers and local customers can camp in their own tents or camping pods whilst enjoying the outdoors or local attractions. It is envisaged that people will have a choice to stay at a number of campsites, while on route from one destination to another, along the South Downs Way.
- Possible Hotel Possible camp sites at either end of the spectrum Possible Activity holiday centre.
- We would put electric in our caravan site but its to expensive so if their was a grant we might consider it.
- self catering Barn conversion - sleep 4/6 . Planning permission already obtained GU28 OHE just off A272 Timber Holiday lodge ? Camping pods ? Depending on most need, planning permission and afordability. there is a rear entrance to the property away from main road.
- Bunkhouse accommodation in converted traditional buildings. 38 bed spaces. Hopefully to be open in mid 2015.
- We have one barn conversion permission on the edge of the Park in Binsted BN180LL for self catering holiday lets but do not now envisage implementing it within the next 3 years. Likewise we have provisional plans to apply for a self catering holiday lets barn conversion permission on Sompting Estate but we do not envisage actioning these provisional plans for perhaps 5 years. The reasons for those delays relates to available funds and other projects.
- self catering barn conversions Touring caravan and camping site Manor farm bishopstone e sussex bn25 2uq.
- •Timber holiday lodge developments •Self-catering barn conversions
- We would like to provide a small cafe and visitor centre.
- Bunkhouse Barns at Houghton for which planning permission has just been received
- Self catering barn conversions on our land at Streat, West Sussex. But it depends on getting planning permission to develop the barns and so we would need the support of the SDNP. Please can somebody contact us to discuss. Michael Haughton.
- Upwaltham Valley (out of sight of the Church, sighting issue!) Touring caravan and Camping site. Camping pods (close to South downs way) Some type of permanent lodge/glamping accommodation in the woods.
- Self catering barn conversion wishing to be done, just may have problems of planning applications due to being in the SDNP. Would be very grateful for help on the matter!
- Considering self catering barn conversions and education or activity centre
- We are in the preliminary stages with EHDC to discuss the possibility of developing 6 to 8 more similar cottages. Sad to say EHDC will not speak to us despite having paid a fee for a consultation and us having tried to pursue a response.

- We have recently put in foundations for a replacement barn - having removed a broiler house - and would consider a holidaylodge development if planning permission was possible.
- Self-catering barn conversion Within the central area of the South Downs National Park
- Self catered barn conversion Near Hassocks/clayton/Ditchling
- At the farm address, conversion of old chicken house site into some form of holiday lets . Not fully decided on wether timber lodge developments or buildings constructed in similair style to house
- Self catering old building conversion. Shepherd huts
- 6 safari tents on a field in the middle of the farm, on the side of the approach to Old Winchester Hill.
- We have another site, betweewn Droxford and Hambledon that is currently being investigated with SDNP planning office for a timber lodge development on the site of a redundant poultry unit in a woodland.
- Dangstein Conservancy, just outside the village of Rogate, West Sussex, encourages community interest and involvement in using, learning about and enjoying heath and woods. Our aim is to protect and enhance local biodiversity and to support traditional countryside skills and landscape management. Accommodation is currently restricted to occasional camping but we investigating scope for community-built overnight accommodation made from on-site timber and through skills training in traditional timber construction methods. The accommodation will cater for people taking the various countryside-based courses on-site, walkers and those with nature conservation interests The accommodation will be limited to small single-room units, designed for low impact, each accommodating up to 4 people and will be entirely off-grid for both electricity and water.
- We have two barns on the Estate where this is being looked at seriously. One of the challenges with old barns is the large amount of capital investment required to bring them up to standard. This is difficult to make a viable return on when doing low cost bunk houses.
- timber holiday lodge for the use of angler walkers and may be horse riders and farm attractions glamping
- Self-catering barn conversion in the Selborne area under consideration Nearest postcode: GU34 3LR
- I need access to many more bed spaces,including ,glamping pods and bunkhouse barns.
- We are beginning to look at the possibility of providing self catering accommodation by converting one of our barns into two or three two bed units.
- Self-catering barn conversions and Timber holiday lodge developments as a farm diversification at Old Farm Houghton BN18 9LN

Q6. What is your main motivation for looking at developing this visitor accommodation project?
Other (please Specify)

- Provide local employment, reuse of redunant buildings (therefore tiding up the locale). Create an economic input into the village of Glynfde and its surronding: village shop, pub, etc.
- encourage people into the national park.
- We have farm tours, weddings, beer festival ad other events and everyone wants to stay.
- The complex of buildings at Sullington (church, former manor house, agricultural buildings) represents a very significant group and there are building fragments representing every century from 11th – 21st, a very rare resource. The small barn is the oldest of the agricultural buildings at Sullington. The use of the small barn has changed as agricultural needs have varied. It was originally a barn for harvest storage with large south and smaller north doorways onto a threshing floor, then has been used as a dairy/milking parlour with a

gully indicated in the north lean-to and plinth for milk churns on the south/road side, in the twentieth century a vehicle inspection pit has been created and the barn became the farm workshop. The barn is no longer suited as a workshop as it is too small to accommodate modern tractors and machinery and has been underutilized for many years, as its use has decreased it has become derelict and is now in danger of collapse. The small barn is a really beautiful timber framed barn and construction evidence suggests that the barn was built, replacing an existing building, in two phases around 1550-1600. We wish to restore this lovely timber framed barn to provide a small cafe facility and interpretation centre describing the history of Sullington and for the many people who use Sullington as their gateway to the Downs and pass through Sullington Manor Farm on the South Downs Way. This will give the barn a secure, self financing future. We would also like to repair and rebuild the historic hill barn to provide bunk accommodation for walkers, cyclists and riders on the South Downs.

- Diversification for Tenant farmer
- To save redundant farm buildings and generate an income flow to pay for the development.
- Improve visual of building that is currently derelict.
- The site adjoins an SSSI and has interest for wildlife and walking in the National Park, maybe even as a Field Centre
- Preservation of existing old brick buildings in Victorian setting with walled garden.
- We are particularly keen to encourage greater public interest in the care and productive usage of woodland in the National Park, which is currently under-utilised and often neglected.
- Enabling the restoration and upkeep of redundant agricultural buildings
- Experience in providing holiday accommodation.

Q7. Are there any barriers holding you back from progressing your plans?
- If yes (please provide brief details)

- I suspect so but haven't got to anywhere near planning. I suspect the problems we may encounter will be conversion for old buildings, and also prohibitively expensive conservation and enviromental considerations.
- Planning
- Funds
- Local opposition, who don't want to see it in there back yard.
- We've not been able to engage with landlords along the South Downs Way in an effective manner to date. It's been very difficult to approach the right individuals who can make a decision whether they want this type of development on their land and likewise, there is no medium for communication for them to know about us and our plans to for them get into contact.
- Lack of expertise/ Lack of suitable partners Lack of broadband Planning system Concerns that tourism related businesses are capital intensive (ie building/maintaining premises) and struggle to reinvent themselves when they stop being flavour of the month.
- Money
- being able to raise capital and planning permission on timber holiday lodge / camping pods. Our idea of timber holiday lodge would be shower space - kitchen area / communal area for use with camping pods.
- Grant funding and accessing start up capital
- Funds and the organisational pressures of managing other projects which are higher priority.
- timing and money and planning constrants
- We are progressing these plans, starting with the work to the barn within the farmstead, and are currently seeking funding. Restoring a 400+ year old barn to maintain it as a barn

and keep the architectural history and evolution of the building intact will not yield a commercial return and therefore bank funding is not appropriate. We will be applying for planning permission within the next month.

- We need planning permission.
- Sighting and road access
- Planning permission due to SDNP.
- Getting planning permission and not knowing whether there will be sufficient demand
- 1. Being able to communicate with EHDC on what they see as being possible/addmissable in planning terms, so that we can develop plans and work out costs. 2. Potentially the cost of development could stop us proceeding as we will be unable to fund the project without borrowing. 3. We are also concerned about a current planning application for a motorcross track near us. The noise so far from this track prevented guests from sitting outside at weekends. There is a huge conflict of interest between the quiet enjoyment of the countryside previously enjoyed by our guests and this track.
- Uncertainty about getting planning permission and the advisability of building close to our own property
- Lack of flexible planning policy from the council
- Finance Planning
- Whether planning permission would be granted and money to pay for the project
- Slowness in getting planning permission. Need to finance the large initial setup costs.
- Capital financing and timescale, possibly the cost of removing the current buildings. Timescales and requirements of the planning system
- as explained above, creating a feasible business model for the return on investment. Planning may also be an issue but we need to work the figures out first.
- planning type of building works that would be allowed aspect and the use of mobiles
- Funding. Planning permission would need to be acquired.
- Chichester council and SDNP have been really unhelpful in this area saying no or having nothing to say about many ideas floated at them .What happened to rural developments?
- We have not started to progress our ideas yet... There may be a planning problem thrown up as we had some trouble in the past getting permission to build our agricultural barns

Q8. Is there any specific assistance or support that you require to help you move your visitor accommodation development project forward?

- Yes (please provide brief details)

- Funding
- Publication of figures that prove there is a demand for accommodation at every level with in the park, not just trendy pub b&b's, but accommodation for low cost rambling/ camping, equestrian and mountain bike users.
- We would need to provide a document or leaflet that can be communicated to the various landlords along the South Downs Way to inform them of our intentions. Interested parties can then get in contact to take matters forward.
- Understand what is acceptable to the SDNP PA in planning terms Find local / national operators who wish to expand.
- Grant
- Advice and financial assistance
- Securing funding under the Leader scheme
- a more forth coming planning policy
- Detailed information on the specification of accomodation required and accurate assesment of the potential demand.
- Planning support and access to funding sources.

- The SDNP have stated that they will support the redevelopment of redundant farm buildings but unless they grant planning permission this cannot be done.
- Meeting with SDNP to ascertain what they would allow. Have approached Chichester District Council
- Help with the planning process of how to go about gaining a successful application
- Help with architectural design and what is acceptable as well as funding.
- Please see point 1. above. If we cannot communicate with planners, then we can't develop plans that will meet the criteria for all concerned.
- Advice in general
- Pre planning consultations that are not charged at a ridiculous fee. This is currently available within the New Forest National Park
- Information relating to any available grants. Info for Building specific requirements for holiday accommodation. Marketing/advertising
- Advice on planning, any grants available and other funding opportunities
- Planning advice.
- Support with marketing strategies, especially using social media would be helpful. We are waiting for the details of the new Fieldfare Leader funding, as this would make a significant difference to us. It is very difficult to assess the impact of using composting toilets in contrast to flushing loos in our chosen market - so I suppose how to go about market research is difficult.
- A plan from the SDNPA of what sort of turist accomodation is needed! We knew nothing about any initial reports or research, and that would be helpful to assist us with our plans.
- We would like to see greater public awareness of the connection between the much-valued countryside and the need to support land-based skills and occupations that manage the designated landscapes of a National Park. This means not just raising public awareness of how to care for the land, but also providing greater public engagement in such activities, the chance to witness and even participate in beneficial land-based activities, learning new skills and even opening opportunities for more rural enterprise.
- Clarity from the planners as to their view on restoration of redundant agricultural buildings. Any data for numbers of people that might like to use visitor accommodation.
- need assistance and guidance on the planning aspect
- Information on unmet demand (if there is any) in the Selborne area for self-catering accommodation would be helpful.
- A body to bounce ideas on and find out what we really want from the national park.
- Planning advice in the future may be very helpful.
- The various departments within the SDNP DO NOT LIASE. At present the SDNP do not have a planning policy and applicants are left to the whims of the various officers, some of which just want to say NO and clutch at any excuse they can to justify it. Our 'Whole Farm Approach' recommended by Tim Slaney was first submitted to the SDNP in 2010. Non of his planning officers pay any attention to it. At present we have spent over £10,000 on 'professional' fees to provide a counter argument for the opinion of the officer (note not the landscape advisor) that the barn conversions of buildings that have been on the site for over 100 years would have a 'severe detrimental effect on the landscape'. There is no heed to the fact that they are an eyesore in the landscape . Reports are being produced at present prior to yet another pre-application discussion with the planning officer. So, YES we do need specific assistance and support to get over the SDNP planning barrier before all of our resources are spent on professional fees and there is nothing left for the project itself!!!!!

Q9. Do you have any land or property that you think could be suitable for the development of the following, either for you to develop yourself or to sell/lease to another party? Country house hotels, Self-catering barn conversions, Timber holiday lodge developments, Touring caravan & camping sites, Camping pod developments, Glamping (luxury camping) sites, Bunkhouse barns, Activity holiday centres.

- **Yes (Yes (please provide brief details of the land/property, including postcode and the types of visitor accomodation you believe it could be suitable for).**

- Most of the above except for activity centre.
- Livery yard with old brick stables, currently unusable. to convert these to two possibly three self contained accommodation lets. To encourage people with there own horses to come and ride and stay. Several local pubs, wayfarers walk and south downs.
- Self catering barn conversion Glamping Camping and caravan Timber holiday lodge
- Timber holiday lodge developments maybe woodland activity centre. Crossbush where my ground is; is well connected in terms or roads, but not set in the heart of the rolling hills where to me it would be a far greater eyesore, but crucial less than a couple of miles from the South Downs Way.   It also has the benefit of being less than 3km to local facilities, buses, shops, pubs etc so from a sustainability view point it is also well situated.
- GU33 6HT - Country house hotel: 10 bedroom house with two cottages, a lake and 30 acres GU34 3NH - Activity holiday centre: 200 acre wood with good road access Estate wide for all other uses
- New Barn Farm Madehurst Arundel BN18 0NN   Equinine centre
- not able to give precise information but would consider advice
- Already detailed above
- As above
- see previos answer
- Self-catering barn conversions •Timber holiday lodge developments
- Not sure whether there is sufficient demand but maybe further accommodation around postcode BN6 9BU
- lake with lodge.woods.barns for conversion
- Bunkhouse barns as above
- We own land that has on it redundant farm buildings that could be converted to "self-catering barn conversions" if SDNP grant planning permission.
- glamping site, touring caravan site
- GU28 0LX •Timber holiday lodge developments •Touring caravan & camping sites •Camping pod developments •Glamping (luxury camping) sites
- Self catering barn conversion a 5 bay old cart shed that is no longer used and is in need of refurbishment into a useful site, touring caravan and camping sites. PO18 9NN
- PO7 4SG barn conversions, camping, timber lodges
- We wish to develop our Farm Yard that has interesting Barns and lovely views of surrounding countryside. The site is at Barrow Hill Farm, GU32 1RW. We are the owners of this Farm Yard and would very much like to develop a further 6 to 8 Cottages following the success of our current 2 Cottage Business. This would enable us to develop the business by employing more people and generally enhancing the area.
- Self-catering barn-style/chalet type accommodation on a yard adjoiningfields RH20 2EN
- Self catering holiday let. We have a former pig house that is in need of restoration that could be made in to a 3 bed holiday let on the farm.
- Adjacent land to the curent business
- Self-catering barn conversions
- Another barn for conversion - large Sussex barn with adjoining courtyard Bn6 8xa Barn conversion or bunkhouse barn

- Old chicken house site, building very large, in poor state of repair Ideally suited to construction of two units for holiday letting
- We have a field with an outstanding planning application for glamping. GU32 1JN
- Timber Lodges, barn conversion self catering and glamping possibilities. These are all located around SO32 3QY, between Droxford and Hambledon.
- Dangstein Conservancy, located at GU31 5BZ, is seeking to provide small bespoke timber units in keeping with the wooded and heathland setting of the site. These should be constructed utilising local materials and by local people as a community-led scheme.
- farm land in the park area with fishing lakes and the southdowns way BN15 0RS timber lodge touring caravans camping glamping
- Barns suitable for self-catering holiday accomodation or bunkhouse developments. near GU34 3LR and vicinity
- Large derelict tithe barn Suitable space and need for more accommodation for existing business.
- We have land close to the A3 that we may be prepared to sell to a developer for any of the above with the exception of camping as the road noise would be too high for tents etc.
- The farm postal codes are BN18 9LW and BN18 9LN Self-catering barn conversions Timber holiday lodge developments

ANNEX C

RESPONSE OF SOUTH DOWNS LAND MANAGERS GROUP TO LOCAL PLAN CONSULTATION ISSUES RELATING TO VISITOR ACCOMMODATION

44	Support for development that provides visitor accommodation, recreation, environmental education and interpretation is welcomed. In relation to the loss of visitor accommodation we would see location, types, presence of other accommodation providers, occupancy rates and marketing carried out as suitable criteria to be applied.
44a	The SDLMG would not want to see development of visitor accommodation restricted to certain parts or areas of the NP such as larger settlements and /or areas in close proximity to visitor attractions as this is likely to disadvantage potential development in rural areas and in particular farm diversification. Such a restriction would militate against Purpose 2 ie the enjoyment of special qualities such as a sense of remoteness and tranquility. As one of the main activities that visitors come to the NP for is walking; accommodation in rural areas is ideally located to make best use of public rights of way.
44b	**Support**. It is precisely in some of the less accessible areas that the conversion of traditional farm buildings to holiday accommodation use may most benefit Purpose 2, cultural heritage, and the Duty.

APPENDIX 8

SOUTH DOWNS VISITOR ACCOMMODATION REVIEW
SUMMARY OF FINDINGS OF VISITOR ACCOMMODATION STUDIES OF RELEVANCE TO THE SOUTH DOWNS NATIONAL PARK

Hotel Solutions has previously undertaken 11 studies for local authority clients across Hampshire and East and West Sussex that have included assessments of the potential for hotel and visitor accommodation development in parts of the South Downs National Park, the major towns, cities and seaside resorts that border the National Park and a similar rural destination in East Sussex:

- Adur & Worthing Hotel & Visitor Accommodation Futures Study (2013)
- East Hampshire Hotel & Pub Accommodation Futures Study (2013)
- Hampshire Hotel Trends Survey (2013)
- Lewes District Caravan & Camping Study (2011)
- Eastbourne Hotel & Visitor Accommodation Futures Study (2009)
- Lewes District Hotel & Visitor Accommodation Futures Study (2009)
- Rother Hotel & Visitor Accommodation Futures Study (2013 & 2009)
- Wealden Hotel & Visitor Accommodation Futures Study (2009)
- Coastal West Sussex Hotel & Visitor Accommodation Futures Study (2008)
- Brighton & Hove Hotel Futures Study (2006)
- Chichester Hotel Futures Study (2005)

The following paper provides a review of these studies. Their coverage varies from hotels only to the full range of visitor accommodation offers. Some distinguish opportunities for the National Park and/or their rural areas separately from the rest of their study area, others do not. While some of the studies are now somewhat out of date, the review provides an indication of the types of visitor accommodation there could still be potential for in the South Downs National Park; key issues that will need to be considered in policy making and inward investment activity to help bring forward visitor accommodation development in the National Park; and the scope for hotel and visitor accommodation development in the towns, cities and seaside resorts on the edge of the National Park, where South Downs visitors may decide to stay.

1. ADUR & WORTHING HOTEL & VISITOR ACCOMMODATION FUTURES (2013)

Visitor Accommodation Development Potential Identified for the South Downs National Park

- Opportunities for the conversion of redundant agricultural buildings to self-catering accommodation.
- Market potential for the Worthing or Hill Barn Golf Clubs to develop some form of hotel accommodation or golf lodges.
- Scope possibly for farmhouse B&Bs in the rural parts of Adur & Worthing/ the South Downs National Park, if there are farming families here that wish to provide such accommodation.
- Additional small scale caravanning and camping provision in terms of certificated sites; small touring caravan and camping sites; eco camping sites; small camping pod operations and camping barns/bunkhouse accommodation.
- Glamping provision in the rural parts of Adur & Worthing/the South Downs National Park.
- Scope for the conversion of a redundant agricultural building in the South Downs National Park to a camping barn or bunkhouse accommodation for groups, particularly walking groups on the South Downs Way.

Visitor Accommodation Development Potential Outside the National Park

- A need to secure the future of the Northbrook Farm Caravan Club site, just on the edge of the National Park, when the Caravan Club's lease expires in 2015. The site plays an important part in meeting demand from caravanners coming to visit Worthing and the South Downs. It is owned by Worthing Council and leased to the Caravan Club. It has suffered from a lack of investment in recent years due to ongoing uncertainties about whether the Council will renew the Caravan Club's lease. The Caravan Club are prepared to invest around £1m in the site if they can secure a long term lease for its continued operation as a caravan site.
- Potential for budget and boutique hotel development in Worthing.
- An opportunity for the development of a budget hotel at Shoreham by Sea.
- Potential for pub accommodation at Worthing, Shoreham by Sea and Lancing.

- Scope for additional guest house and B&B accommodation, including 5 star and boutique B&Bs at Worthing and Shoreham by Sea.
- Potential for additional high quality self-catering apartments, holiday homes and beach houses, including boutique and access exceptional units, and 'super homes' for large parties.
- An opportunity for a surfing pod development at Shoreham and Lancing Beach.
- Potential to upgrade Beach Park holiday Park to cater for watersports enthusiasts, and extended opening.
- Hostel development at Beach Green to cater for groups and watersports/kite-surfers.

2. EAST HAMPSHIRE HOTEL & PUB ACCOMMODATION FUTURES (2013)

Visitor Accommodation Development Proposals in the National Park

- Two hotel proposals were identified in the National Park:
    - A country house hotel at Adhurst St Mary - 69 bedrooms with enabling residential development (planning granted 2009).
    - The development of 10 hotel bedrooms at Blacknest Golf and Country Club.

Visitor Accommodation Development Proposals outside the National Park

- The Nicolas James Group property company, based in Christchurch, Dorset has purchased part of the former Treloar School campus for the development of a luxury country club hotel and residential property. Planning permission was granted for the scheme in May 2013. The hotel will have 14 apartments and 8 suites that can be let in different combinations to give a total of around 45 letting bedrooms.

- Other hotel proposals identified outside the National Park are for:
    - A 40 bedroom budget hotel on the A3 southbound at Liphook (permission 2010);
    - An extension to The Old Thorns to add 54 apartments (permission 2013).

- The following interest in hotel development was also identified:
    - Interest from Premier Inn in developing a 50 bedroom hotel in or around Alton;
    - Interest from Travelodge in Petersfield and possibly Alton.

Visitor Accommodation Development Potential Identified for the South Downs National Park

Petersfield

- Market potential for further budget hotel provision, in terms of the expansion of the Premier Inn and/or development of a second budget hotel in the town.
- Possible scope for a small boutique hotel in the town centre.
- The potential redevelopment of some of the land at the Festival Hall car park could provide an opportunity to incorporate some form of hotel provision, most likely in terms of the addition of hotel bedrooms to the Red Lion pub or possibly a budget hotel or small boutique hotel, perhaps as an upper floor use.
- There could also be scope to incorporate some form of conference facilities to meet the requirements of local businesses for meeting rooms.
- Scope for further pub accommodation, including boutique inns – through the expansion of existing pub accommodation businesses and/or the development of guest bedrooms within or adjacent to other pubs in the town.

Villages

- Scope for further pub accommodation, including boutique inns – through the expansion, upgrading and possible repositioning of existing pub accommodation businesses or the development of guest bedrooms within or adjacent to other village pubs.

Rural Areas

- Scope for the development of guest bedrooms within or onto some rural pubs;
- Possible scope for the expansion of existing rural hotels in terms of additional bedrooms and possibly the development of function, leisure or spa facilities.
- Potential for the development of luxury country house hotels, given suitable properties for conversion e.g. Adhurst St Mary;
- Scope for the development of hotel accommodation at golf clubs;
- Potential for the development of guest accommodation at wedding venues;

3. HAMPSHIRE HOTEL TRENDS SURVEY (2013)

Hotel Development Proposals in the South Downs National Park

- The Holiday Inn Winchester is proposing an additional 36 bedrooms, dry leisure facilities and spa treatment rooms and additional meeting space.

Hotel Development Potential Identified for the South Downs National Park

- Budget hotel potential at Petersfield.
- Possible potential for the development of a small boutique hotel in Petersfield, given suitable properties for conversion. As a key centre in the South Downs National Park, Petersfield has a distinct lack of good quality visitor accommodation. No suitable properties have been identified for conversion to a boutique hotel and none of the town's pubs are actively considering the development of boutique guest bedrooms.
- Potential in Hampshire's rural areas for:
    - Country house hotels, given suitable properties for conversion.
    - Golf hotels – in terms of the expansion of existing golf hotels, e.g. Old Thorns Manor at Liphook, and/or the development of new hotels on golf courses or completely new golf resort developments.
    - Family hotels – Luxury Family Hotels, the UK's only family hotel operator, is already represented in the New Forest. It may consider other opportunities in Hampshire and other operators may emerge that might consider the county as a location.
    - Restaurants with rooms and gastropubs with boutique bedrooms – in the county's smaller towns, villages and rural areas.

- Locations in Hampshire close to the National Park boundaries with the potential to provide for National Park visitors include Winchester , Havant and Eastleigh. There are proposals for hotels and hotel developer/operator interest in all 3 locations as well as identified potential for a mixture of budget, upper tier budget and boutique hotel development.

4. LEWES DISTRICT CARAVAN & CAMPING STUDY (2011)

The study does not specifically separate out the opportunities for additional provision for touring caravanning and camping within and outside the National Park. It provides clear evidence of market potential for the following:

- Modest expansion of existing touring caravan and camping sites in the District.
- The development and upgrading of existing touring caravan and camping sites in terms of:
    - Putting in hard standings to attract touring caravans and motor homes during shoulder season months and into the winter;
    - Electric hook up points;
    - Toilet and shower blocks;
    - Laundry facilities;
    - Children's play areas.
- The extension of the operating season of existing sites, in some cases to year-round operation.
- The development of further luxury camping units on existing sites and new luxury camping operations.
- The development of new campsites, camping barns and possibly camping pods along the South Downs Way National Trail.
- The development of new small-scale touring caravan and camping sites elsewhere in the District.
- Possible scope for the development of a large new club site for the Camping and Caravanning Club, subject to further discussions with the Club, most probably linked to an existing or new visitor attraction, leisure or sports facility. Such a site may require some form of permanent accommodation for the site manager. It is likely that such a proposal would need to be considered in a sub-regional context (i.e. beyond just Lewes District). Finding an appropriate site that is acceptable in planning terms could be difficult.

The research shows strong demand for touring caravanning and camping in Lewes District at weekends and during the peak summer months, and clear evidence of shortages of provision for caravanning and camping for Bank Holiday and summer weekends. The study also identifies frustrated demand for camping provision along the stretch of the South Downs Way that runs through the District, together with strong demand for luxury camping and clear market potential for more provision of such accommodation in the District.

It must however also be recognised that:

- Most existing sites have spare capacity during the week and for most weekends outside the peak summer months and Bank Holidays;
- There is a clear need to protect the landscape of the District, particularly in the South Downs National Park.

These factors suggest that the priorities for the District should be in terms of:

- Small-scale, incremental expansion of existing touring caravan and camping sites;
- The controlled development of largely small-scale new sites that are well screened and landscaped.

A significant and rapid expansion of provision could undermine the viability of existing sites. Encouraging large-scale touring caravan and camping sites would be generally inappropriate given the importance of protecting the District's landscape.

5. EASTBOURNE HOTEL & VISITOR ACCOMMODATION FUTURES (2009)

This report focused on assessing the potential for the development of new and retention of existing hotels, guest houses, holiday flats and self-catering apartments in the resort of Eastbourne, the Eastbourne urban area and particularly the seafront, and concluded there was potential for:

- Investment in the existing hotel supply and potential to reposition as boutique hotels, budget hotels and aparthotels.
- Possible potential for new build budget hotels and new boutique hotels. A new Premier Inn has opened in Eastbourne in 2014.
- Possible opportunities to attract innovative hotel products such as aparthotels, spa and wellness hotels and a waterpark hotel.
- A case for retaining existing hotels.
- Scope to consider alternative visitor accommodation options for closed and run-down hotels including aparthotels and luxury apartments.
- Potential for the development of luxury self-catering apartments through new build and conversion.

The demand assessment recognises the role that Eastbourne can play in acting as a gateway to the South Downs National Park, being at the end of the South Downs Way, and sees the establishment of the National Park as a driver of additional leisure demand to the resort.

The study did not look at the potential for hostel accommodation but at the time of the study the new YHA Eastbourne hostel was under construction.

6. LEWES DISTRICT HOTEL & VISITOR ACCOMMODATION FUTURES (2009)

The study does not specifically separate out visitor accommodation opportunities within and outside the National Park.

It identifies the strongest opportunities for new accommodation development in the District as around Lewes town and the rural parts of the District. It sees the National Park designation as resulting in increased demand for visitor accommodation in this part of the District, with potentially low-key accommodation provision and the re-use of redundant farm buildings within the Park boundary.

Identified accommodation development potential includes:

- Hotels:
  - The expansion and development of existing hotels in terms of additional bedrooms and leisure, spa, conference and banqueting facilities;
  - New boutique hotels in Lewes town;
  - New country house hotels;
  - New spa hotels;
  - New golf resorts;
  - The development of hotel accommodation linked to wedding and conference venues, including visitor attractions that cater for these markets;
  - New budget hotels in Newhaven and in Lewes town or on the A27 – and interest from Premier Inn and Travelodge in Lewes.
- Pub Accommodation
  - The upgrading and/or expansion of existing pub accommodation operations:
  - The development of new pub accommodation operations through the development of guest bedrooms within and/or adjacent to pubs.
- Guesthouses and B&Bs
  - The upgrading and/or expansion of existing guesthouses and B&Bs;
  - The establishment and development of new guesthouses and B&Bs.

- Self-Catering Accommodation
  - The conversion of barns and other redundant agricultural buildings to self-catering accommodation, in terms of both individual units and holiday cottage complexes;
  - The development of purpose-built holiday lodges, chalets and log cabins, again both as individual units and in small complexes (subject to meeting environmental impact considerations);
  - The expansion and development of existing holiday cottage complexes in terms of the development of additional units and central leisure facilities and other amenities.
  - The development of lodges and holiday cottages linked to outdoor activities such as golf, fishing and horse-riding.

- Touring Caravan and Camping Sites
  - The expansion, development and upgrading of existing touring caravan and camping sites;
  - Extended opening of touring caravan and camping sites, possibly to year-round operation;
  - The use of touring pitches for seasonal tourers;
  - The development of new touring caravan and camping sites;
  - The development of new luxury camping accommodation products, such as camping pods, yurts and tipis.

- Holiday Parks
  - The expansion, development and upgrading of existing holiday parks;
  - Extending the opening of holiday parks, possibly to year-round operation;
  - The development of new holiday lodge parks.

- Group and Youth Accommodation
  - New youth hostels. The new YHA South Downs hostel at Beddingham has opened since the study was completed;
  - Residential activity centres;
  - Camping/ bunkhouse barns;
  - Residential training/conference/ management centres.

The need for retention policies is identified for hotels and non-serviced visitor accommodation due to pressure for change of use from residential development.

7. ROTHER HOTEL & VISITOR ACCOMMODATION FUTURES (2009/2013)

While these studies do not cover any park of the South Downs National Park they relate to a not dissimilar, attractive rural area that draws overnight visitors from the same catchment markets as the South Downs. Lessons can therefore be learned for the National Park from the findings on hotel and visitor accommodation development potential in this area.

The study looked at how to address the tension between the potential for visitor accommodation in the countryside and the need to limit impact through sustainable forms of development, as well as how small and larger urban settlements might serve the wider area with their visitor accommodation offer.

Retention was identified as an issue and mechanisms to strengthen and support the policy set out.

Potential was identified for a wide variety of visitor accommodation development. In the countryside this included:

- The upgrading and possible expansion of existing hotels under existing or new owners, including the addition of hotel spas and the expansion and development of function facilities at existing hotels to enable them to cater for weddings and functions trade.
- The development of hotel accommodation on some of the District's golf courses.
- Possible scope for the development of country house hotels and niche country house hotel products such as luxury family hotels, adult only hotels and spa hotels, given suitable properties for conversion.
- The development of hotel accommodation linked to wedding venues.
- The development of hotels on holiday parks and holiday centres in the District.
- Possible scope for the development of winery hotels at Carr Taylor and Sedlescombe vineyards along the lines of hotels that have been developed on some European vineyards.

- The upgrading and/or expansion of existing well-located and characterful pub accommodation operations, as well as the development of new pub accommodation operations through the development of guest bedrooms within and/or adjacent to pubs, and scope to develop gastropubs and restaurants with boutique guest bedrooms.

- The continual upgrading and/or expansion of existing guesthouses, B&Bs and farmhouse B&Bs to meet rising customer expectations, including 5 star and boutique guesthouses and B&Bs, more guest accommodation with family rooms and suites and the establishment of new guesthouses, B&Bs and farmhouse B&Bs to replace the natural churn in the sector.

- Possible scope for B&B for Horses (providing bed and breakfast accommodation alongside stabling and grazing for horses), and the development of walker and cyclist friendly services and facilities at guest houses and B&Bs.

- Potential for further quality self-catering cottages and holiday homes across Rother's Countryside of all sizes (residential lets and barn conversions), including scope for some further 5 star, fully en-suite and boutique holiday cottages; the development of self-catering complexes, potentially with swimming pools and other leisure facilities; additional 'super cottages' for large family and friends get togethers, and 'access exceptional' cottages designed for independent wheelchair users.

- Market potential for, and operator interest in the development of holiday lodge parks through the acquisition and redevelopment of existing holiday parks and/or touring caravan and camping sites or new holiday lodge park development given suitable sites that can achieve planning permission.

- Potential for existing holiday parks to replace caravan holiday homes with holiday lodges or to add holiday lodges to their offer.

- Possible scope for the development of eco lodges/eco lodge parks, for ownership and/or rental.

- Opportunities for holiday lodges linked to specific outdoor activities, such as fishing lodges associated with existing or new fishing lakes; holiday lodges alongside horse riding stables; and golf lodges at golf courses either for rental, timeshare or outright purchase.

- Possible scope for the development of a small number of self-catering treehouses in suitable woodland settings.
- A market requirement for the ongoing upgrading of existing holiday parks.
- Potential interest from national holiday park operators in acquiring and redeveloping existing independent holiday parks in the District.
- Market potential for the expansion of existing holiday parks if they have land available or can acquire additional land, as well as interest in extending the season and trading year round.
- A market requirement for the ongoing upgrading of existing touring caravan and camping sites and expansion to cater for demand at peak times.
- Scope for existing touring caravan and camping sites to introduce camping pods and/or some form of glamping accommodation.
- Potential for the development of camping pod sites and the provision of camping pods at other sites such as fishing lakes, golf courses, hotels and holiday parks.
- Some potential for additional small touring sites and certificated sites, particularly on farms.
- Possible scope for new larger touring caravan and camping sites.
- Potential for the development of further eco camping sites in the District.
- Scope for touring caravan and camping sites to increase their numbers of seasonal tourer pitches.
- The development of permanent on-site accommodation for site managers for the purposes of site security and winter maintenance and opening.
- Possible interest in extended opening periods for touring caravan and camping sites, including some interest potentially in year-round operation.
- Scope for existing glamping sites to add further units.
- Good potential for the development of further glamping sites.
- Scope and operator interest for year round operation of glamping sites.

- The development of facilities such as shops, cafes, meeting rooms, indoor leisure and possibly staff accommodation to help develop midweek and winter business.

- Potential interest from national and regional operators in suitable opportunities for the development of children's activity holiday centres.

- Scope for the conversion of redundant agricultural buildings to camping barns or bunkhouse accommodation for groups, especially close to locations with appeal for watersports and outdoor activities.

8. WEALDEN HOTEL & VISITOR ACCOMMODATION FUTURES (2009)

The Wealden study does not specifically identify visitor accommodation development opportunities for the area of the National Park within the District. The potential identified includes:

- Hotels
    - New country house hotels, spa hotels and golf resorts;
    - The development of hotel accommodation linked to wedding and conference venues, including visitor attractions that cater for these markets;
    - The upgrading, expansion and development of existing hotels in terms of additional bedrooms and leisure, spa, conference and banqueting facilities;
    - New budget hotels along the A22 and A27.
- Pub Accommodation
    - The upgrading and/or expansion of existing pub accommodation operations and development of new pub accommodation operations through the development of guest bedrooms within and/or adjacent to pubs.
- Guesthouses and B&Bs
    - The upgrading and/or expansion of existing guesthouses and B&Bs and establishment and development of new guesthouses and B&Bs.
- Self-Catering Accommodation
    - The conversion of barns and other redundant agricultural buildings to self-catering accommodation, in terms of both individual units and holiday cottage complexes;
    - The development of purpose-built holiday lodges, chalets and log cabins, again both as individual units and in small complexes;

  - The expansion and development of existing holiday cottage complexes in terms of the development of additional units and central leisure facilities and other amenities.
  - The development of lodges and holiday cottages linked to outdoor activities such as golf, fishing and horse-riding.

- Touring caravan & Camping Sites (limited provision identified in the South Downs)
  - The expansion, development and upgrading of existing touring caravan and camping sites;
  - The development of new touring caravan and camping sites;
  - The development of new luxury camping accommodation products, such as camping pods, yurts and tipis.

- Holiday Parks
  - The expansion, development and upgrading of existing holiday parks and the development of new holiday parks – perhaps less suited to the South Downs given their scale and impact.

- Group and Youth Accommodation
  - The expansion and development of the existing youth hostels in the District and development of new youth hostels – the Southease and Eastbourne YHA hostels are referred to;
  - Children's activity holiday centres and residential outdoor education centres;
  - Camping/ bunkhouse barns – particularly referred to in relation the South Downs for walking and outdoor activities;
  - Residential training/conference/ management centres.

9. COASTAL WEST SUSSEX HOTEL & VISITOR ACCOMMODATION FUTURES (2008)

The Coastal West Sussex Hotel & Visitor Accommodation study as its name would suggest focused on the coastal strip between Bognor and Shoreham taking in the other key towns of Littlehampton and Worthing.

Potential was identified for the following hotel development:

- Budget hotels at Bognor, Littlehampton, Worthing and Shoreham by Sea;
- Upper tier budget or possibly 3 star hotel development at Bognor and Worthing linked to growth in corporate demand;
- Possible repositioning of existing hotels to boutique hotels at Worthing; possible new boutique hotel development at Littlehampton, Worthing and Shoreham;
- Possible re-positioning of existing hotels as coaching/leisure hotels at Bognor and Worthing;
- Up-grading of pub accommodation and new pub accommodation development in all locations;
- Up-grading of guest houses and B&Bs and new development in all locations.

Potential for other forms of visitor accommodation in terms of:

- The development of serviced apartments in Worthing and longer-term in Shoreham Harbour through letting residential apartments, converting hotels and purpose built units;
- Additional self-catering accommodation in terms of letting residential property, conversion of hotels and purpose built accommodation;
- New touring caravan and camping sites and a need to retain the current level of provision for this type of accommodation;
- Potential for existing holiday parks to upgrade and/or expand, and possible scope for new holiday parks;
- The continued development of hotels at Butlins to replace the resort's chalet accommodation.

10. BRIGHTON & HOVE HOTEL FUTURES (2006)

The focus of the Brighton & Hove Hotel Futures study was very much about the concentration of hotel accommodation in the city centre and along the seafront, and how to direct new hotel development and protect loss to ensure the future supply could best serve key existing markets and emerging demand drivers.

Whilst not a focus of the study, the critical mass of accommodation that Brighton has means it can play a role in accommodating visitors to the National Park. Potential was identified for significant new hotel development – between 1000 and 1300 new hotel bedrooms – depending upon plans for the development of the conference centre - primarily at 4 star level but also incorporating some 3 star and budget hotel development. Three new hotels have since opened in the city, adding another 450 bedrooms to its hotel stock.

11. CHICHESTER HOTEL FUTURES (2005)

The Chichester Hotel Futures study identified potential for the following development over the 5-18 year period that followed its publication (now 9 years ago):

- A boutique hotel in Chichester city centre, and possibly longer term potential for further boutique hotels in the city, given suitable properties for conversion;
- A second sizeable (100 + room) budget hotel in Chichester, and possible scope for a third budget hotel in the longer term;
- Possible scope for luxury country house hotels in the District, given suitable properties for conversion;
- Potential for further high quality pub accommodation ;
- Scope for bedroom extensions to existing hotels, and the development of conference, function, leisure and spa facilities;
- Potential possibly for more niche hotel offers such as luxury family hotels, given the strong performance of these types of hotel elsewhere.

Locationally:

- The greatest opportunities for new hotel development were identified as being in Chichester, due to its strength as a leisure break destination, and its role as the main focus of corporate activity and possible future business development.
- No clear potential for new hotel development was identified in Midhurst. The opportunities here lie more in upgrading and further developing existing hotels, and possibly some high quality pub accommodation.
- Possible scope for a small quality hotel or quality pub accommodation in Petworth, primarily to cater for leisure break business and local weddings trade.

RELEVANT ISSUES FOR THE SOUTH DOWNS NATIONAL PARK

The Potential for Visitor Accommodation Development in the South Downs National Park

Our analysis of all of these previous studies shows potential for the development of a wide range of visitor accommodation products across the National Park in terms of:

- The refurbishment, upgrading and possible repositioning of existing visitor accommodation businesses to meet customer expectations, attract new markets and improve trading performance.
- The possible expansion of existing accommodation businesses in terms of additional letting rooms, units or pitches to meet peak period capacity shortages.
- The development of new facilities, such as leisure facilities, new restaurants and function space, to provide extra income streams, attract new markets and help extend the season and attract winter demand.
- The development of new visitor accommodation businesses in terms of:
    - New budget hotels in Petersfield and Lewes;
    - Boutique hotels in Petersfield, Lewes, Midhurst and possibly Arundel;
    - Country house hotels;
    - Hotels on Golf courses;
    - Pub accommodation;
    - Restaurants with rooms;
    - B&Bs and guest houses to replace those that close as their owners retire;
    - Barn conversions to holiday cottages and holiday cottage complexes;
    - Holiday lodge developments, including holiday lodge parks, eco lodges, fishing lodges and golf lodges;
    - Treehouses;
    - New touring caravan and camping sites;
    - Eco camping sites;
    - Camping pod developments;
    - Glamping sites;
    - Bunkhouses and camping barns;
    - Children's activity holiday centres;
    - Residential activity centres.

Planning Policy Considerations

Our analysis of these previous studies identifies the following issues that we believe need to be considered in framing planning policies for visitor accommodation development in the National Park:

- The need to seek to retain existing visitor accommodation businesses, particularly in the face of competition from higher value residential uses.
- The scope for re-use of buildings in the countryside.
- The scope for diversification of rural landholdings and businesses to make them more sustainable, create jobs and income and secure retention of rural buildings.
- The potential need for enabling development to support the development of heritage properties where a visitor accommodation use could help secure its future.
- The amount of new build that might be allowed in the countryside, including extensions to existing buildings.
- The role that visitor accommodation outside the National Park/on its fringes can play is serving the needs of visitors to SDNP.
- The degree to which visitor accommodation in the main settlements within the National Park can serve the needs of visitors that want to stay in the Park, and what needs it cannot meet.
- The need to recognise that many of the visitor accommodation products for which there is potential in the National Park require a countryside location.
- The appropriate scale of development outside urban areas.
- How to best serve the accommodation needs of existing and potential users of the South Downs Way;
- The possible need for the allocation of sites where there is a lack of availability in a priority location for a desired/beneficial visitor accommodation development e.g. a hotel in Petersfield.
- How to respond to the accommodation needs of specific markets e.g. walkers and cyclists.
- How to extend the season and avoid planning conditions that restrict the months of opening of visitor accommodation where there is market potential for year round operation.
- Exploring the potential for visitor accommodation development that offers potential for low impact, sustainable development, as well as the potential to bring economic and social benefits to local communities and businesses and aid farm diversification.

APPENDIX 9

SOUTH DOWNS VISITOR ACCOMMODATION REVIEW

SUMMARY OF FINDINGS OF OTHER MARKET RESEARCH & CONSULTATIONS

1. HAMPSHIRE & SOUTH DOWNS MARKETING ACTION PLAN

- The **Hampshire South Downs Marketing Action Plan** produced by consultants Blue Sail in September 2010 identifies three key market segments for the Hampshire South Downs:

    - Culture Experiencers - culture-motivated urban professionals – aged 30-50s – visiting without children.
    - Culture Vultures - culture-motivated visitors - aged 50-70 – visiting without children.
    - Active & Connect - outdoors-motivated, 'responsible' tourists - aged 25-50 – visiting with and without children.

- The priority will be staying visitors living within a 3 hour travel time but with some activity to reach these market segments in some key overseas markets and some work to target groups of these types of customer.

- Key selling points of the area are identified as the South Downs National Park, Jane Austen, the distinctive landscape of the area (steep wooded hills and hidden valleys), local produce (in terms of watercress, lavender, vineyards, hops and trout-filled streams) and the peace and quiet of the area.

- The Action Plan sets out actions for developing the Hampshire South Downs visitor experience in terms of:

    - Developing walking and cycling routes, including circular walks off two long-distance footpaths, improving the cycle network and developing the Shipwrights Way.

- Building closer links with the Hampshire Food Festival and strong involvement in the new South Downs Food and Drink Festival;
- Developing the accommodation offer in terms of walker and cyclist friendly accommodation;
- Training for visitor-facing businesses to improve their awareness of local distinctiveness.

2. ACCOMMODATING VISITORS ALONG THE SOUTH DOWNS WAY

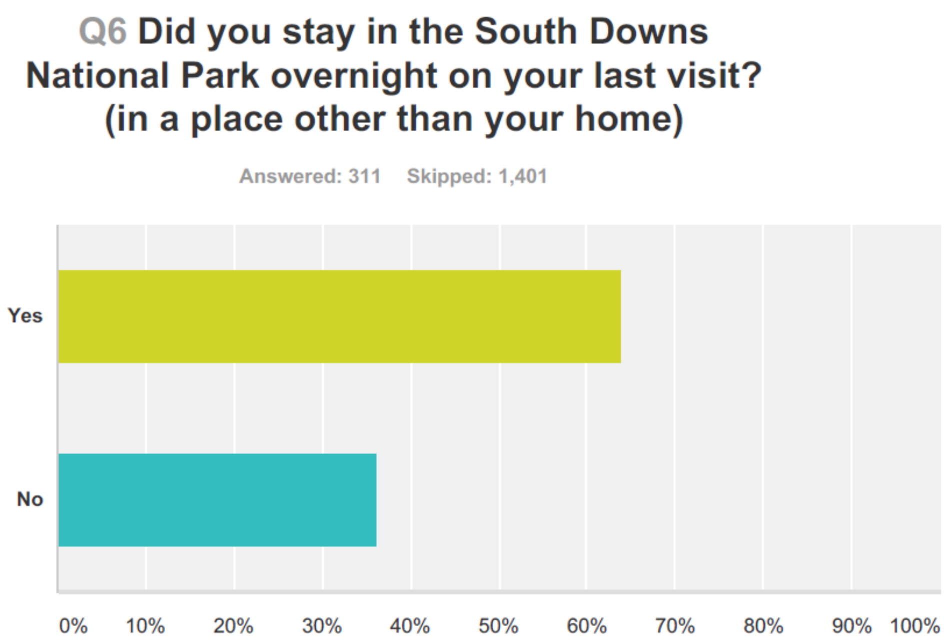
Summary of Response from the South Downs Way Officer

- A really useful and long overdue piece of work.
- The information that can be provided is from experience and anecdotal evidence.
- The current accommodation offer is best viewed via the on-line interactive map on the National Trail website. It is possible to search for specific types of accommodation, get their details, view them on a map or see accommodation as a list. http://www.nationaltrail.co.uk/south-downs-way/plan There is also equestrian and cyclist specific accommodation listed here.
- The only developments we are aware of that could serve the SDW are the proposal for Forest Holiday Lodges at Houghton Forest and YHA SouthDowns' phase 2 development at Itford Farm. We have had a couple of farms looking into converting barns into bunk house accommodation in the past but none of these ever happened due to planning constraints.
- The 2 most obvious gaps in visitor accommodation are:
  - The gap in campsites between the Petersfield and Midhurst areas and the extreme eastern end of the National Park.
  - The lack of hostel accommodation in the west and central areas of the SDW. This has been made worse with the recent closures of Patcham, Warningcamp and Winchester hostels and Alfriston YHA may close soon. The lack of hostel at the Winchester end of the trail is particularly important.
- The other issues to be aware of are

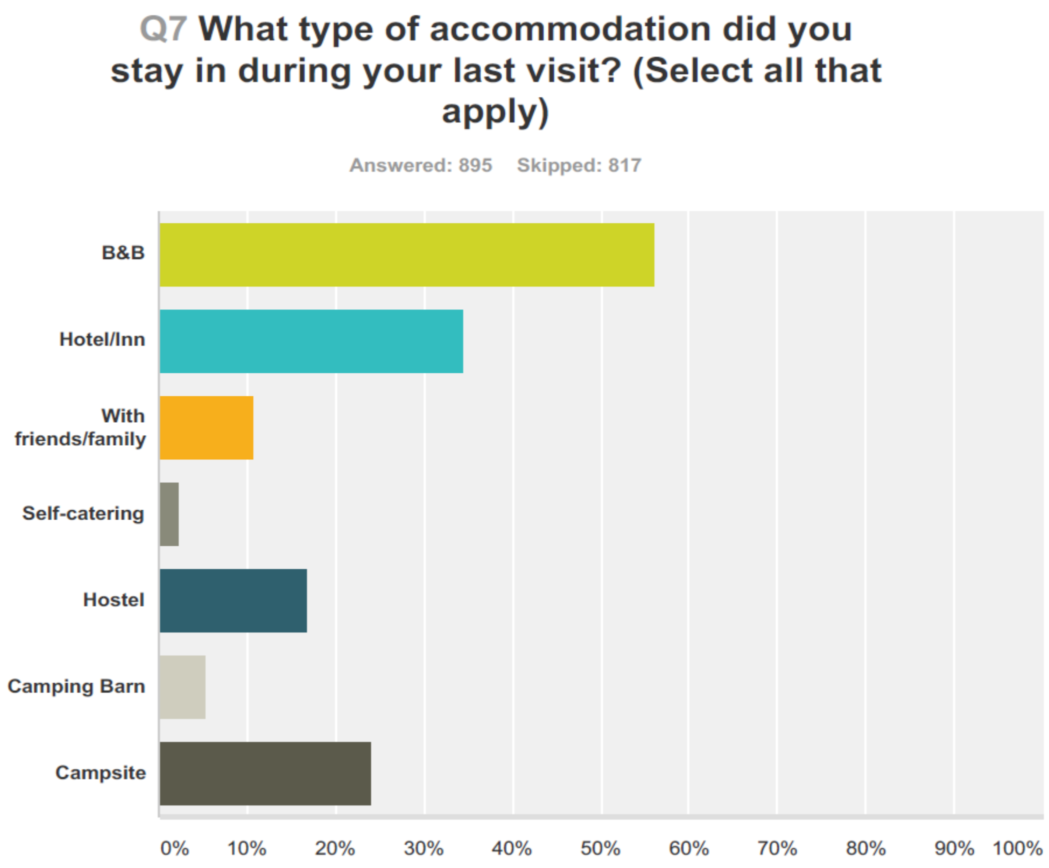
  - In some locations although there is B&B accommodation there is insufficient during holidays.
  - Some campsites are not accepting single night stays, due to strength of demand. This is a serious problem for through walkers of cyclists trying to complete the whole trail.
  - Some campsites are fully booked, especially at weekends in the summer, and this forces some to wild camp illegally near the Trail.
  - Panning permission issues might be a barrier to provision of more accommodation.

- The SDW needs a good network of camping pods/camping barns along the trail, but this is a bit like the chicken and egg. No one wants to invest in this until there is a usable network, one site alone is not sustainable. People need to be able to walk or ride from one end to the other knowing they don't need a tent!
- Data from the South Downs Way National Trail Survey provides the following data on accommodation usage by trail users.

South Downs Way National Trail Survey



South Downs Way National Trail Survey



3. FUTURE PROSPECTS – KEY TOURISM MARKET TRENDS & INFLUENCES

Over the next decade, the tourism market place will be influenced by a range of factors – economic, demographic, social and technological:

- **The continuing "Staycation".** The economic downturn has led to a massive change in holiday behaviour and attitudes, with leisure becoming ever more important even as finances are stretched. The increase in domestic trip taking and parallel decline in overseas travel was initially driven by cost, but many other factors have contributed to the continuation of the trend – including a preference for multiple short breaks over the year; risk aversion; last minute planning; more deals and offers available through online travel agents and daily deals sites; hotel and visitor accommodation development and improvement, including a number of new accommodation products that have captured the market's imagination; and new visitor attractions, events and festivals. In the short term, the staycation is likely to remain.

- **Economics and recession-led trends.** In the longer term, holiday taking patterns are unlikely to revert to pre-recession patterns – for some people behaviours have changed fundamentally, while others have discovered and genuinely enjoy breaks in England. There is however an ambition to have long holidays abroad, which people will do when they can afford to. There is also likely to be a continuation of recessionary spending patterns even after recovery (and especially among younger generations) – this means more emphasis on deals, offers and added value packages. However, recessionary experiences (and therefore recovery experiences) differ among consumers – some consumers have experienced increased spending power, others the opposite.

- **Other recent domestic tourism trends** include:
  - Turning VFR trips into leisure ones. The driver behind this has partly been economic (see above) but other drivers exist which may mean the trend may continue – these include maximising leisure time, and the changing demographic picture (creating more opportunities for family get togethers).
  - Domestic tourism can benefit from wider trends – e.g. health tourism (spa breaks) and active / adventure tourism. This will be driven by a more active retired generation.
  - Rural and urban tourism have experienced strong growth in recent years. Both destination types can benefit from the growth in short breaks, with an opportunity to combine breaks (rural and urban).
- **Domestic visitors are often creatures of habit** -two thirds of people booking a UK destination do not consider another destination – 93% of these will have visited that place previously. Four fifths are not influenced by any advertising. Destination choice, especially for short breaks, tends to be driven by where someone lives – they will typically be looking at options in their immediate region (up to 2 hours away).
- **An ageing UK population** – in the medium term the number of people over 65 is increasing. This generation is a powerful economic force, with sufficient time and disposable income to enjoy short breaks and regular holidays – albeit spending power can be threatened by declining values in pension plans and savings.
- **Growth in younger generations** - while this is a potential opportunity for domestic destinations, it is also a challenge – this group is characterised by a lack of knowledge and also prejudices about England and English destinations which prevents them considering these as holiday or break options. The Generation Y market also has very different requirements and expectations from hotels, accommodation businesses and destinations, with a greater importance placed on distinctive design, a relaxed atmosphere and a high level of technology and connectivity.

- **Family composition** is also changing – with grandparents more involved in childcare. This has implications with potentially more intergenerational family holidays and a need for appropriate products to cater for this. Similarly, the UK population is becoming increasingly **ethnically diverse** and this represents a market of increasing importance but one that is poorly understood.

- **Online booking and marketing** - consumers are increasingly booking hotel accommodation through the growing number of third party websites that offer discounted accommodation and holidays such as LateRooms, lastminute.com, booking.com, Expedia, Trivago, and hotels.com, and taking advantage of special offers promoted through daily deals sites such as Groupon, Wowcher, Living Social, Travelzoo and Secret Escapes. Hotels are also increasingly using e-marketing and social media channels to reach customers. This is resulting in an increasingly deal-driven and competitive market but enables hotels and accommodation businesses to affordably reach millions of potential customers both in the UK and overseas and allows hotels to proactively market their available inventory, albeit often at reduced rates. The growth of customer review sites, in particular Tripadvisor, is making it ever more important for hotels 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.

- **Tourism is becoming increasingly experiential** - tourists are looking for 'immersion' in a culture, unique experiences, authenticity, exploration, adventure and personal fulfilment from their holiday experience. The 'what' is more important than the 'where'.

- Linked to this, as we, as a society, have become **more 'active'** (i.e. doing many things) we have created time pressures and a subsequent desire for control in our lives. This means a desire for greater simplicity in some of our choices and, linked to the technology trend, a desire for personalised holiday and short break products.

- While environmental concerns are not currently mainstream in terms of holiday taking decisions in the UK, for some markets, other consumer trends include **evolving ethical concerns** among consumers. These are now broader than more established environmental concerns and conspicuous forms of consumption have fallen out of favour (with an emphasis on consumers learning new skills and acquiring 'cultural capital' to distinguish themselves).

- **Inbound tourism** is forecast to grow strongly in the UK, boosted by the massive worldwide exposure of the country during the London 2012 Olympic and Paralympic Games. The Deloitte/Oxford Economics report for VisitBritain projects a 6.1% per annum growth in inbound tourism to the UK and an average real annual growth rate of just over 14% in overseas tourist spending in the UK through to 2025. A recent report commissioned for Barclay's Retail and Hospitality & Leisure banking teams predicts that spending by overseas tourists in the UK will grow to over £27bn by 2017, representing an increase of 34% on the 2013 figure, equivalent to an average annual growth rate of 6.75%. Strong growth is expected to come from the emerging economies such as China, UAE, India, Brazil and Russia due to the increasing wealth of consumers in these countries. A new streamlined visa service introduced in August 2014 will make it easier for Chinese people to visit the UK. By 2017, the UAE and Russia are set to break into the top ten nationalities to visit the UK, while spending by Chinese tourists visiting the UK is set to increase by 84% compared to the 2013 figure.

4. SURVEY OF HOLIDAY COTTAGE LETTING AGENCIES

We interviewed the following four holiday cottage letting agencies that are well represented with holiday let properties in the South Downs National Park:

- Cottages4You (Wyndham Vacation Rentals) - 49 properties in the National Park;
- Amberley House Cottage Holidays - 50 properties in the National Park;
- Henry Adams Holiday Lets - 17 holiday let properties in the South Downs, predominantly in the Chichester and Midhurst area;
- Mulberry Cottages - 15 properties in the National Park, including two recently developed high quality holiday cottage complexes in the Hampshire part of the South Downs.

All four agencies identified strong demand for holiday cottages of all sizes in all parts of the South Downs National Park. They reported high demand for full week lets during school holiday periods, the shoulder season months (May, June, September and October), and the Christmas and New Year period. Outside of these times demand is strong for weekend lets. All four agencies identified shortages of holiday let properties at these times and an interest in taking on more holiday cottages across the National Park. Some agencies also reported demand for longer lets during the winter from people working locally or those requiring temporary accommodation while work is being undertaken on their home or while they move house.

The strongest demand and most frequent shortages were reported in the following areas:

- Arundel
- Midhurst
- Goodwood
- Petersfield
- Lewes
- Pulborough
- Ditchling
- Bignor & Sutton

Agencies expressed the strongest interest in taking on more of the following types of holiday cottage:

- 4 and 5 star properties
- Luxury and boutique properties that offer a 'wow' factor - for agencies that trade at the top end of the market;
- Properties with gardens and views;
- Cosy cottages - that let well during the winter;
- 2 and 3 bedroom properties - agencies generally have enough 1 bedroom properties;
- Holiday cottage complexes with leisure facilities;
- Large properties that can cater for family and friend get-togethers and celebrations.
- Barn conversions - which have strong appeal or holidays;
- High quality timber holiday lodges.

Agencies reported limited demand for wheelchair adapted holiday let properties but showed some interest in taking on properties that were suitable for people with lesser mobility difficulties.

APPENDIX 10

RURAL VISITOR ACCOMMODATION DEVELOPMENT TRENDS IN THE UK

Hotels

Hotel Development in Market Towns

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

- The development of **Premier Inn and Travelodge budget hotels** in market towns such as Trowbridge and Devizes in Wiltshire, Leek in Staffordshire, Market Harborough and Melton Mowbray in Leicestershire, Wadebridge in Cornwall, and Bicester and Witney in Oxfordshire. As the market leaders in the UK budget hotel sector Premier Inn and Travelodge have continued to open hotels apace across the UK, although Travelodge has cut back on its development programme as a result of its financial restructuring, prioritisation of investment in existing hotels and focus on London for new hotel development. Premier Inn and Travelodge 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 National Parks for one or other, or both of these hotel companies are currently Ambleside, Keswick, Windermere and Kendal in the Lake District; Lymington, Lyndhurst and Brockenhurst in the New Forest; Matlock and Buxton in the Peak District; and Betws-y-Coed in Snowdonia.

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

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

- Some regional boutique hotel chains that are focusing on market town and rural locations have also emerged e.g. The Pig boutique hotel company with hotels in the New Forest, Southampton, Studland Bay in Dorset and near Bath; 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 new Barton Hall Hotel that opened in Northamptonshire in 2014; the opening of the Ellenborough Park Hotel & Spa near Cheltenham in 2011; and the redevelopment in 2012 of Wood Norton Hall near Evesham as a country house hotel. Plans have also been unveiled for the development of new luxury country house hotels in Hampshire (the conversion by the Nicolas James Group of the former Treloar School near Alton), Surrey (the conversion of Cherkley Court near Leatherhead), West Yorkshire (involving the conversion of Bretton Hall near Wakefield) and Kent (on the Salomons Estate in Tunbridge Wells). A number of country house hotel companies have also 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 in the last 16 months 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.

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

- There has been some activity in terms of the development of **alternative accommodation options at luxury country house and golf hotels** e.g.
    - Tree houses at Chewton Glen in Hampshire;
    - Eco pods at the Old Thorns Manor golf hotel at Liphook in Hampshire;
    - Luxury self-catering apartments at the Four Pillars Cotswold Water Park hotel in Gloucestershire;
    - Timber lodge suites at the Alexander House Hotel in West Sussex;
    - Luxury woodland holiday homes at The Cornwall Hotel & Spa at St Austell in Cornwall;
    - Eco lodges for ownership or rental adjacent to the Barnsdale Lodge hotel in Rutland.

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

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

- Recent years have also seen the development of a number of smaller **boutique country house hotels** through the conversion of country mansions, upgrading and repositioning of existing hotels, or development of redundant outbuildings at country house properties. Examples include:
    - The Cranleigh at Bowness-on-Windermere in the lake District (www.thecranleigh.com)
    - The Brimstone Hotel, Langdale in the Lake District (www.brimstonehotel.co.uk)
    - The Corran Resort and Spa, Laugharne, Carmarthenshire (www.thecorran.com)
    - 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)

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

- **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. the Magnolia Park Golf and Country Club in Buckinghamshire has opened a 30-bedroom Best Western Plus hotel in 2014

- 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 stand alone 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 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)
- 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 41 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 will be opening in 2014 and 2015. The company launched the Revere Pub Company in 2013 as a premium pub brand, so far including 4 inns with boutique accommodation in Hampshire, West Sussex 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 operates the budget Good Night Inns brand alongside 29 of its pubs across the country.
- 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.

- 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 Peach Pub Company across the Midlands; Oakman Inns & Restaaurants with pubs and inns across Oxfordshire and Hertfordshire; and Miller's Collection, with three inns in Hampshire and Berkshire.

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.

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 in neighbouring areas include:

- The Malt House, Chipping Campden, Gloucestershire www.thecotswoldmalthouse.co.uk
- 62 Middlebridge Street, Romsey, Hampshire www.62middlebridgestreet.co.uk
- Forge House, Southwick, Wiltshire www.forgehousebedandbreakfast.co.uk
- Daisybank Cottage, Brockenhurst, New Forest www.bedandbreakfast-newforest.co.uk
- Hellifield Peel Castle, near Skipton, Yorkshire Dales www.peelcastle.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 over the past 5 years has resulted in a significant increase in the numbers of residential properties that have become available to rent as holiday accommodation. With lower house prices owners have become more interested in making their properties available as holiday lets than selling at a reduced price. With the residential property market now starting to recover this trend could reverse in the next few years.

The overall **quality** of the UK self-catering offer has improved significantly over the last 10-20 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 and whirlpool baths;
- 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.

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:

- 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 Getaways (www.boutiquegetaways.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:

- 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)
- Cliff Barns in Norfolk (www.cliffbarns.com)

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.roslistonforestlodges.co.uk/chestnut-lodge.php)

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 has 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 have changed their strategy to holiday letting as a result. With the economy now starting to recover there is likely to be renewed interest in holiday lodge ownership.

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) – 6 sites in East Sussex, Essex, Norfolk, Cambridgeshire, Devon and Cornwall;
- 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.

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 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:

- 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

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
- De Vere Luxury Lodges (www.devereluxurylodges.co.uk) – luxury golf lodges for sale or rent have been developed as part of De Vere's Belton Woods and Slaley Hall golf resorts in Lincolnshire and Northumberland.
- 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.co.uk/yorkshire-dales/self-catering-holidays.php)
- Brompton Lakes, Yorkshire (www.bromptonlakes.co.uk/log-cabins-yorkshire.asp)
- Mill Meadow Eco Homes, Somerset (www.millmeadow.co.uk)
- Rosehill Lodges, Cornwall (www.rosehilllodges.com)
- Wheatland Farm Eco Lodges, Devon (www.wheatlandfarm.co.uk)
- Ludlow Ecolog Cabins, Shropshire (www.ludlowecologcabins.co.uk)
- Eagle Brae in Invernesshire (www.eaglebrae.co.uk)
- The Emerald, Carnon Downs, near Truro, Cornwall (www.emeraldcornwall.co.uk)

Holiday Villages and Resorts

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

A new luxury 5-star holiday resort is currently being developed in Carbis Bay at St Ives in Cornwall. Una St Ives opened in August 2014 with a first phase of 41 holiday lodges for sale. Each lodge has been constructed with wood from sustainable sources and includes sheep's wool insulation, triple glazing, sedum roofs and solar panels. A further 78 lodges are to be built over the next 2 years. The resort also has an on- site restaurant, a delicatessen selling organic Cornish food and drink products, a spa and an infinity swimming pool and leisure complex.

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

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

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)

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 has affected the sales of holiday parks, as despite market interest prospective buyers have had difficulty in securing finance.

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

Touring Caravan and Camping Sites

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

Both the Caravan Club and the Camping and Caravanning Club are investing substantially in improving their sites. The Caravan Club typically invests in excess of £10million annually in site improvement and development, while the Camping and Caravanning Club embarked on a 5-year, £29 million investment programme in 2009 to position its site network amongst the best in the UK by 2015. The Club has invested £1.9 million is 2014 and will invest a further £1million during winter 2014/15 in site improvements including upgrading toilet and shower blacks, new reception buildings and site shops, resurfacing site roads, more hard standing and electric hook-up pitches, new children's play areas, and site security measures.

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

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

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

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

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

The recession, together with innovations in easy-to-erect tents and camping equipment, have stimulated strong growth in demand for camping in the UK, despite the poor summer weather in 2011 and 2012. In a survey undertaken by Campsites UK in 2013, 23% of campers indicated that the current economic climate had made them more likely to choose a camping holiday in the UK and nearly two thirds said that wet weather would not force them to pack up and go home.

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) 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; 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 and its new South Downs hostel at Lewes in East Sussex (www.yha.org.uk/places-to-stay/alternative-accommodation/camping-pods). The National Trust is another organisation that has started to offer camping pods at three sites in the Lake District, Clumber Park in Nottinghamshire and a site in Northern Ireland www.nationaltrust.org.uk/holidays/camping/camping-pods . Holiday parks, holiday lodge parks, touring caravan and camping sites and hotels are increasingly introducing camping pods as an alternative accommodation option. Examples are:

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

Glamping

A key trend in recent years has been the rapid growth of glamping (glamorous camping) offers, in terms of ready-erected, fully-equipped tents, yurts, tipis and other unusual forms of camping and caravanning accommodation such as geodesic domes, gypsy caravans, retro caravans, safari tents, glamping pods and tree camping. These types of accommodation have proved to be highly popular with more affluent families that want to experience camping holidays but without the hassle of having to bring their own tents and camping equipment. As a new form of accommodation they have attracted significant media coverage and wherever they have opened such accommodation operations have quickly attracted strong demand. Go Glamping (www.goglamping.net), the leading online directory of luxury camping sites, now lists 128 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 now has 33 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.

- **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. 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/)
  - **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) 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.
- **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).

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 the new Eastbourne hostel 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 closure of the Arundel hostel and the development of the new YHA South Downs hostel at Itford Farm near Lewes.

YHA's newest hostel is the YHA Eden Project in Cornwall, which opened in October 2014. It 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 next new hostel opening will be the new YHA Brighton in the former Royal York Hotel in November 2014.

Children's Activity Holiday Centres

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

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

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

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

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

Wellness Retreats

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

- ecoYoga in Argyll (www.ecoyoga.org)runs yoga courses, retreats and holidays in self-catering accommodation. The site offers a range of bathing facilities including rainforest showers, a large hot tub, artisan sauna and two wild river hot baths.
- Slimmeria Retreat in Crowhurst in East Sussex (www.slimmeria.com), which offers detox, fitness and weight loss holidays in a Georgian country house offering boutique hotel bedrooms and a luxury health spa.
- Tofte Manor at Sharnbrook in Bedfordshire (www.toftemanor.co.uk) is a manor house wedding and events venue that offers a range of wellness retreats and inspirational workshops including massage, meditation, yoga and labyrinth walking. It has 12 luxury guest bedrooms and can also offer accommodation in yurts and tents with outdoor hot water showers for larger groups.

APPENDIX 11

SOUTH DOWNS VISITOR ACCOMMODATION REVIEW

VISITOR ACCOMMODATION DEVELOPER & OPERATOR TESTING – KEY FINDINGS

1. Purpose of the Survey

The purpose of the survey of visitor accommodation developers, operators and investors was to test potential interest in their being represented in the South Downs National Park – either via acquisition (and likely further development) of an existing business, or in the form of new visitor accommodation developments. Their interest is a 'live' indicator of market potential, but also an opportunity to explore their site requirements, any issues surrounding the development of their offer - including barriers to investment - and to 'warm up' that interest by making them aware of the market research and identified opportunities.

2. Methodology and Sample

The research was undertaken via and email and telephone survey with the owners and senior management teams of visitor accommodation developers, operators and investors, and in some cases with agents representing them and playing an active part in their site finding, acquisition, planning and development programmes.

Identifying a sample for this element of the research has not been straightforward for a number of reasons. In particular, many of the types of development opportunity appropriate to rural areas such as the South Downs National Park are relatively small in scale and most likely to be taken up by independent operators or small regional groups. These are much more difficult to identify, to get access to, and to secure a response from, compared to national branded operators who have established acquisitions teams with a dedicated development role. Any interest identified in this element of the research therefore is likely to provide only a partial picture in terms of the likely up-take of development opportunities; indeed the landowner survey and the operator surveys both show development intent from individuals already based in the National Park that could deliver a wide range of new visitor accommodation projects.

The sample was drawn from Hotel Solutions' database of sector contacts, as well as operators emerging from the additional modules of research undertaken, and was structured to:

- Be representative of the full range of visitor accommodation development opportunities identified in the market research;
- Include national operators associated with any key proposals in the National Park and in the surrounding area (as identified in the proposals review);
- Target other national brands known to be active in the market, both in core and niche visitor accommodation provision, with brands that have good fit to the identified market potential (as identified in the national rural accommodation trends review);
- Incorporate regional visitor accommodation developers and operators that are represented in the National Park and/or the surrounding area, who have been actively acquiring and developing and who might reasonably consider additional representation (as identified in other Hotel Solutions' studies in Hampshire and Sussex).

The sample comprised a total of 26 visitor accommodation developers, operators, investors and agents. Whilst there is an element of commercial confidentiality to their responses, below we summarise these collectively, drawing out where appropriate and possible key messages relating to particular issues, locations and types of accommodation.

3. The South Downs National Park as a Location for Visitor Accommodation Investment

The South Downs National Park in general has a positive image as a location for investment in visitor accommodation. Underpinning this are certain key strengths including:

- Location in terms of catchment population, particularly access to and from London, but also the affluence of much of the demographic, which is especially important for high-end offers such as luxury hotels, boutique inns and glamping;
- An attractive environment and setting for any accommodation development;
- The draw of activities such as walking and cycling providing a motivation to visit;

Clearly responses vary according to the nature and type of the product concerned, for example, the lack of sizeable towns in the National Park means that many of the larger hotel brands wouldn't consider developing there as they lack the critical mass of population and businesses to support a 100+ room hotel. But in terms of products that rely on a leisure-driven market, the image of the South Downs in terms of market potential is good.

Whilst the South Downs name and approximate location was understood at a general level, there was some blurriness about the boundaries of the National Park itself, and a need in several cases to provide a map to provide clarity on the exact area which was the focus of our interest.

4. Interest by Type of Visitor Accommodation

In the table overleaf we summarise the interest received from developers, operators, investors and agents, by type of visitor accommodation. Where this interest is location-specific, this is noted.

Those that were not interested in developing, investing or operating in the South Downs gave the following principal reasons:

- They felt this area was already covered by operations of their type either within the National Park or immediately around it;
- They were focusing on other geographic priorities, often for reasons relating to ease of operational management within a region, or because of an identified gap in their network;
- They were interested in locations just outside the National Park, e.g. Winchester and Brighton, rather than locations within it;
- For business market-led offers, a limited corporate base.

VISITOR ACCOMMODATION DEVELOPER/OPERATOR/INVESTOR INTEREST IN SOUTH DOWNS

Type	Developer/Operators/Investor/Agent Interest	Interest by Location
Budget hotels	Two leading national brands	Lewes Petersfield
Boutique hotels	Three operators with regional representation	n/s
Luxury country house hotels	Two leading developer/operators with local/regional representation Regional developer/operator	In the Chichester, Petersfield, Lewes and Winchester areas
Pub accommodation	National pub restaurant chain National inn chain Independent pub owners	Lewes Petersfield Across the National Park
B&Bs	Independent developers/operators[1]	Across the National Park
Holiday lodge parks	Two national investor/developer/operators National operator requiring development partner	n/s
Holiday lodges	Independent developers/operators[1]	Across the National Park
Holiday cottages	Independent developers/operators[1]	Across the National Park
Touring caravan & camping sites	Independent developers/operators[1]	Across the National Park
Camping pods	Independent developers/operators[1]	Across the National Park
Glamping	National glamping chain Independent developers/operators[1]	Across the National Park
Bunkhouses/camping barns	Independent developers/operators[1]	n/s
Hostels	YHA	Interested in expanding accommodation provision at the South Downs hostel + in Winchester city centre
Children's residential activity centres	Regional developer/operator (via agent)	Max. 20 miles from coast

Notes

[1] Interest expressed via operator/landowner survey
n/s Location non-specific

5. Barriers to Investing in Visitor Accommodation

The most frequently cited barrier to investment was planning. These comments are based on a combination of experience with SDNPA and its predecessor local planning authorities, together with experience of developing in other rural areas including AONBs and National Parks. There are several dimensions to issues surrounding planning:

- Extremely restrictive planning policies, particularly limiting developments of scale;
- The planning process, in terms of the time it takes to get decisions, the volume of associated documentation, and the lack of delegated decision-making even on small schemes;
- The requirement for investigations to support applications e.g. to see if certain species are on site, adding to cost but also to time delays, particularly as species investigation can be restricted by seasonal presence;
- A sometimes confrontational approach to proposals, focusing on what is wrong with them rather than how to put it right;
- A failure to recognise the commercial implications of what is being requested as part of the planning process and the cost and time delay implications – two consultees gave examples where a whole operating season was missed as a result and marketing activities held back for fear of not being able to deliver the visitor accommodation on time.

Consultees also quoted examples of good practice where planning authorities were working with them to find the optimum solutions for a site, for both the owner and the council, and SDNPAs activities where Planning Link Officers are working with big estates and landowners to develop estate masterplans is one such case.

The availability and suitability of sites is also a significant barrier to investment in an area such as the South Downs National Park. This applies not just to the sensitive rural areas but also within the market towns where hotel developer interest in locations such as Petersfield has proved difficult to move forward.

Other barriers to investment relate to funding and the difficulty in securing it, together with the delicate balance in terms of viability of schemes where development costs and need for quality are high, but income limited by seasonality constraints. Infrastructure costs associated with schemes in rural areas are also frequently high and require a critical mass of development to bear them which might be deemed inappropriate, again impacting on the viability of schemes.

6. Overview and Implications for Forward Action

Clearly, the South Downs National Park is an attractive location for investment in visitor accommodation, and there is interest from national, regional and local developers, operators and investors in being represented here with a variety of offers for which market potential has been identified, whether through acquisition of an existing business or new development.

The market work indicates there is a shortage of visitor accommodation, and the fact that development interest is not being realised on any scale points to a constrained environment for development, the key barriers being focused around planning, site availability/suitability, the availability of funding and issues surrounding project viability.

Any forward programme of action needs to concentrate on redressing the balance in some of these key areas to facilitate the development of additional visitor accommodation, within a policy framework that will both permit the benefits of staying visitors in the economy to be maximised whilst ensuring the other purposes of the National Park are not jeopardised.

'Here to Stay?'

TOURIST ACCOMMODATION RETENTION & LOSS

Guidance for Local Authorities
on the Development of
Planning Policy

October 2006

1. Prepared by

TOURISM
SOUTH EAST

in association with

ack
tourism

Tourism Solutions
RESEARCH & DEVELOPMENT CONSULTANCY

Extract from Here to Stay – Tourist Accommodation Retention and Loss

5. KEY ISSUES & GUIDING PRINCIPLES

Some Emerging Issues

TSE and the Tourism Solutions/ACK Tourism team's work on the retention of tourist accommodation has identified a number of issues commonly faced by local authorities that any Guidance and toolkit would need to take on board:

- **Concern about the enforceability of retention policies**

  Consultations with local authorities demonstrated conflicting messages about the enforceability of retention policies. Many had been challenged at appeal and had decisions over-turned, particularly where the arguments had hinged on the issue of non-viability ie the operator demonstrating that the business is no longer commercially viable and is without the potential to be so. There is a clear legal precedent that has established that it is not reasonable for local authorities to insist on the continuation of a planning use if there is no likely prospect of that use returning to the site (Westminster City Council v. British Waterways Board 1985)

- **The need for a more sophisticated approach**

  As a result of these concerns, many felt the time had come for a more sophisticated approach to retention and the management of loss, based upon more robust evidence-based policies. Leading-edge locations like Bournemouth have demonstrated success in developing such policies and supporting SPGs, that have subsequently been upheld at appeal.

- **A paucity of expertise and relevant policy/case examples**

  Currently there is no central reference point to which local authority policy development and development control officers can refer, although many Councils are dealing with these issues on a day to day basis. There was also concern that

Planning Inspectors did not necessarily understand some of the financial arguments being put before them, and that there were no specialist Inspectors with particular experience in the field of tourist accommodation retention and loss.

- **Can a 'one size fits all' approach to retention policy development work?**

There is a common concern to resist the loss of tourist accommodation across destinations, and it would seem much to learn from one another and central guidance. However, consultees agreed that there is a need also for sensitivity as to how guidelines are implemented, to reflect local circumstances and characteristics. A combination of generic policies and some that are destination-specific was the preferred approach.

- **Varying needs by destination type**

There would seem to be issues common to particular types of destination that require a specific policy response. Many seaside resorts for example are tackling issues of oversupply in the light of changing market requirements, and in such circumstances a managed loss may be required and a certain level of protection to ensure a critical mass of accommodation in the areas of greatest demand is retained. In many resorts also there are currently more limited prospects for new hotel development by the national branded chains to replace lost stock. Historic towns and cities however often have a more diverse economic base and strong interest in new hotel development as well as concerns to provide housing and commercial development that may override tourism provision as a strategic priority. Differing policy responses will be required in such circumstances, but there is still the opportunity to learn from comparator destination types.

- **Varying needs by destination lifecycle stage**

The lifecycle stage of a destination also would appear to have a role to play in determining the need for particular retention policy approaches. Destinations losing market share and needing to re-position may need to protect stock and encourage conversion to self-catering so that it doesn't reach a tipping point beyond which there is no return. Those that have turned the corner in terms of finding a new role, where demand is growing once more and new markets being attracted, and where there is significant new development interest from the national branded chains, may have less need for protection – other than focusing development in key areas or protecting unique character properties. The levels of public sector investment in the destination are key to the health of the resort and have a part to play in supporting the accommodation sector. A strategy for tourism that provides a framework for tourism development is also a key part of the mix.

- **Retention policies and the promotion of new hotel development**

Local authorities are concerned to understand the relationship between new hotel development and the retention of existing stock and how policies relating to both can work alongside one another. In destinations where traditional markets are declining, the advent of a new hotel can seem like the kiss of death to businesses struggling to maintain their market share. However, often new hotels bring the ability to attract new markets, particularly where the national branded chains are involved as they bring with them the power of their marketing and central reservations teams. They can be key to aiding the re-positioning of a destination. However, this doesn't mean that the existing stock should be permitted to exit freely, and policies for new hotel development can sit happily alongside retention in core areas and other policy approaches that ensure a sustainable diverse accommodation offer for the destination. Local authorities need to understand the nature of demand and supply, as well as the forward strategy for the resort, to develop policies that will deliver the right mix for the destination. New hotel development may also be restricted to core areas – indeed sequential testing directs development here – and to meeting specified criteria that may relate to meeting emerging market needs or quality standards. Strong interest in new hotel development may provide some scope for a relaxation of retention policies, but the implications of this in terms of the location, nature and character of stock need to be fully understood.

- **Can retention policy hold back major regeneration schemes?**

The consultations did not identify any specific examples of this, although the potential of a site for a wider destination benefit has undoubtedly been an issue in the determination of applications, albeit in a supporting role to key policies eg retention within a core zone. There needs to be a good understanding of the market and supply to underpin these decisions. As stated earlier in this report, there are examples where a strong and clear retention policy can assist the tourism regeneration by reducing the opportunities for property speculation.

- **The conversion of serviced accommodation to self-catering as an option to industry exit**

The advantage of this approach is that it retains a certain level of tourism provision, but it is important that such policies are based upon evidence of market need, and supported by the enforcement of quality standards and a guarantee of tourism usage. The danger without regulation is the delivery of poor quality units that end up outside the tourism sector. Viability still needs to be an issue here, just as it is in most serviced accommodation retention policies, and schemes should demonstrate this. Planners typically fear that self-catering is one small step towards permanent residential use, so conditions to ensure tourism use are clearly required.

- **Negotiating benefit from tourist accommodation loss**

This has clearly been happening on a case by case basis without necessarily any strategic thrust to deliver a wider benefit. This is an area where policy guidance is developing at national and regional level, and where the needs and concerns of the tourism sector should be taken on board.

Guiding Principles

A number of guiding principles have emerged as TSE and the Tourism Solutions/ACK Tourism team have consulted local authority contacts, reviewed local regional and national policies, assessed appeal judgements and analysed case studies. Adoption of these principles would seem to provide the framework for a policy approach that can then be further refined to reflect local circumstances.

The guiding principles point towards policies that are:

- **Well-defined and transparent**
    - Clearly spelled out in terms of the rationale behind the policy and how it will be implemented;

- **Consistently applied**
    - Out of fairness to applicants but also so that Officers, Members, Inspectors and applicants/their advisors cannot challenge the Council in its approach;

- **Objective – criteria/evidence-based**
    - Criteria-based policies seem to be the way forward, and provide a set of requirements that the applicant must respond to and provide evidence against;

- **Economically realistic**
    - Viability is at the core of many of the change of use arguments requiring an understanding by the Council and Inspectors of the economics of hotel operation;

- **Reasonable**
    - In terms of knowing when to let establishments go, both in terms of the individual circumstances surrounding a property and the contribution it is making to the bigger picture;

- **Related to prioritised needs of the destination**
    - In terms of identified core areas where it is desirable that accommodation is retained;

- **Linked to tourism strategy**
    - To support identified market priorities and priorities for the location of development/investment

- **Flexible**
    - Responsive to changes in the market, the economy and the destination (albeit that timeframes may require determination)

- **Market-led**

    - Which requires the monitoring of market and performance trends

- **Should not perpetuate accommodation for which there is no market**
    - Again requiring an understanding of market needs and the required product response.

- Based on **consultation with the local tourism/hotel industry**.

Application of these principles requires a local authority to:

- Think through how the implementation of policies will impact on the destination

- Set out clearly the criteria and evidence to be presented by any change of use applicant

- Have the support tools and data to be able to debate and indeed where required counter the argument being put forward by the applicant with the benefit of commercial assessments and advice.

6. AN EVALUATION TOOL

The Starting Point

The starting point for the development of any policy approach to accommodation development, including those relating to retention, must be to have **a clear vision for the destination** and its future development, and to define within this **the role that the accommodation sector plays**. Local Authorities should seek to articulate in their Tourism Strategies what the accommodation needs are of the key markets being targeted, and to translate this into a 'shopping list' of accommodation development needs that also identifies where this development should be located. This should form the basis of the policies for the Local Plan/LDF, having thought through how this can be delivered, via a combination of new development, retention and up-grading of existing accommodation, and - where there is no longer a market need – managed loss, with the ultimate aim of securing a vibrant, healthy and sustainable accommodation base for the destination that meets both market needs and supports the wider development and viability of the destination.

It is important that this vision is based upon a sound understanding of the market and performance of the sector, rather than unrealistic expectations and anecdotal evidence. A baseline study and on-going **monitoring of trends in both demand and supply** will ensure that the Local Authority is founding its policies on hard evidence of growth or decline, and will provide an up-to-date backcloth to the determination of planning applications.

Implementing Retention Policy

Once the policy is established, putting a system in place that will equip the Local Authority planning and tourism teams to assess the current and future tourism potential of an individual accommodation business, within the context of the destination's wider planning and tourism objectives, should enable a systematic and informed view to be arrived at that can be consistently and fairly applied. A full explanation of the rationale behind these policies and of the criteria that will be used to assess applications provides transparency, and in the Good Practice examples we have identified has often been delivered via a Supplementary Planning Document.

The cornerstone of the strongest retention policies reviewed was the expectation that change of use applications should include proof of:

(1) endeavours to sell the business as a going concern, and

(2) non-viability, both now and in the future

It is possible to wrap these two criteria into one in that a failure to sell the business is one indicator of non-viability, rather than them be considered on an either/or basis, as was recently the case in Oxford.

At the end of this section, we set out an example **evaluation tool** that Local Authorities can draw on in pulling together a viability test against which to evaluate change of use applications, with suggestions of:

- **the criteria against which applications should be assessed**, principally:
    - proof of marketing for sale
    - evidence of business performance
    - evidence of professional management
    - evidence of attempts to save the business

- **the type of evidence sought from applicants** to demonstrate that they meet these criteria – or otherwise, including:
    - Independent valuation
    - Sale marketing materials and responses
    - Accounts
    - Occupancy and Achieved Room Rate data
    - Business Plans
    - Marketing Plan, schedule and brochures
    - Investment schedule and plans
    - Details of plans to up-grade/re-position with full costings

- **the response required from the Local Authority, including sources of information and expertise**, which could include:
  - Tourism Strategy inputs/consultation with Tourism Team
  - Independent property valuations/local agent inputs on hotel sales
  - Monitor of supply, loss and development
  - Monitor of demand across the destination and by area
  - Assessment of hotel standards and fit for purpose
  - Benchmark data on business performance by size and type
  - Accountancy inputs on viability of current and potential schemes
  - Surveyor inputs on required investment costs

Resourcing and Impact

Clearly there is a cost to implementing this process, in that there needs to be a set of baseline data about demand, supply and performance, on-going monitoring, plus manpower and additional expertise that could be gained from one or more sources including Planning and Tourism Team time, and the input of expert advice from agents and surveyors to accountants and business advisors.

Whilst there is a cost to this, costs are in reality already being incurred by Local Authorities in handling planning applications and appeals. In the case of Bournemouth, where these procedures have been in place for some time, the Council feels that they have benefited considerably from adopting this approach – not only in successfully retaining accommodation. By sending a clear message out about retention and enforcement and through pre-application discussions, more speculative development applications have been deterred, fewer applications get to committee if a refusal is likely, fewer appeals have been taken, and more have successfully been up-held – from a previous 50% success rate, the past year has seen all the appeals dismissed by the Planning Inspectorate. As more cases are taken, the process becomes more cost and time effective, with the build up of knowledge, data, expertise and test cases to draw on.

Bournemouth has been able to make use of specialist skills within its own organisation, in that the Head of Tourism has expertise in the field of hotel operations, but the Council has also managed to successfully harness expertise within the resort's business community, with public-spirited local accountants, professional advisors to the local Hotel Association, and 'beacon' hotel operators all prepared to make an input to assessments and appeal cases. This group of experts, led by the Head of Tourism, in effect undertake the analysis on behalf of the Planning Team. In the case of Eastbourne, consultants have been commissioned to produce performance 'models' for hotels of different types, standards and sizes, which can be used to benchmark key performance indicators.

AN EVALUATION TOOL
For Use in Applications for the
Change of Use of Hotel Accommodation

A - An Introduction to the Viability Test

The Local Authority needs to set out clearly why this is a priority for the destination and how the policy will be applied, including**:**

- Why does the Council wish to retain tourist accommodation
- Where/to whom do these policies apply
- The onus is on the applicant to make the case for change of use
- The need for the viability test to accompany the change of use application
- Encouragement of pre-application discussions to guide and steer applicants and avoid applications with insufficient support material to make their case

B - The Criteria

The criteria against which any application will be assessed need to be set out, with an explanation of the evidence sought in each case; this is what the applicant must provide to make the case for change of use. The key criteria are:

- **Proof of marketing for sale**
  Has there been a realistic attempt to sell the business as a hotel over a reasonable period of time?
    - The business should have been marketed for sale as a going concern for a minimum period of time (12-18 months)
    - Reputable local or specialist national agents should be used
    - The property should be marketed at a realistic/competitive price (determined through an independent valuation)

    - Evidence of sale marketing should be provided (brochures, advertisements, records of response, interest and offers);

- **Evidence of business performance**

  Is the business performing profitably and in line with levels of occupancy typical of industry/destination norms?
    - Occupancy and achieved rate data for the past 3 years;
    - Copies of accounts for the past 3 years
    - An explanation of factors driving this performance and their impact on profitability and viability

- **Evidence of professional management**

  Has the business been professionally managed, marketed and invested in?
    - Details of management experience
    - Marketing plan and support material to be provided demonstrating attempts to attract business with copies of brochures and advertising schedule
    - Business Plan for the past 3 years and evidence of forward business planning
    - Investment schedule demonstrating investment in the property over the past 3 years and proposals for maintenance and improvement works

- **Evidence of attempts to save the business**

  Have alternative scenarios for the future been thoroughly examined and professional business support engaged?
    - Details of schemes to up-grade and re-position the business, partially convert to an alternative use in return for investment in the remaining rooms, and conversion to self-catering, as appropriate, with costs and performance forecasts
    - Evidence of assessments and inputs by business support agencies and hotel advisors

C - Developing a Commercial Understanding of Hotel Operation

In order to assess the evidence supplied by applicants, it is critically important to have a commercial understanding of hotel operation – this applies to both the Local Authority determining the initial application and to Planning Inspectors determining appeals. Whilst most Local Authorities would not have these skills in house, it is possible to draw on external expertise and to build up a database of key performance information. This ensures, for example, that more emphasis is given to the potential trading performance of the business (through projections of Earnings Before Interest, Tax, Depreciation & Amortisation) rather than to costs that are peculiar to the current owner (such as debt charges on high levels of borrowing).

To understand and if necessary challenge the case being put forward by hotel operators, the Local Authority will need supporting data and advisory inputs in the following areas:

- **Location**
  Is this a priority area for tourism activity?
    - If zones or clusters have been identified, the location should be related to these.
    - How does this location relate to the tourism strategy
    - What is the quality of environment like
    - Is the hotel close to generators or potential generators of demand

  This information can be provided by a combination of the Tourism and Planning Teams

- **Accommodation Offer**
  What range of facilities is on offer and to what standard?
    - Is there an identified need for this type/size/standard of accommodation in the tourism/marketing strategy
    - Has the accommodation been inspected and graded
    - Is there evidence of investment in the property
    - Is the property fit for purpose

- Does it have adequate parking and access (Council standards), including by public transport

This information could be provided by:

- *Tourism Team/TIC inspection*
- *Independent hotel advisor/assessor inspection*
- *Planning Team re parking standards*

- **Development Potential**

  Does this property and location have the potential for up-grading or re-positioning whilst still keeping it in tourist accommodation use?

  - What works would be required
  - What would the cost of these works be
  - Are the costs of redevelopment put forward by the applicant realistic
  - Could the re-modelled offer meet identified market needs in the tourism strategy
  - Is there potential for better use of the site? Could there be an enabling development to retain or improve the tourism use.

  This information could be provided by:

  - *Independent consultant/surveyor*
  - *Tourism Team re type of accommodation sought to meet market need*
  - *Accountancy input re forecasts for trading and viability*

- **Historic/Current Trading**

  What levels of demand has the hotel experienced in the past 3 years and how profitable has it been?

  - How does the hotel's income, costs, and profitability (often expressed as EBITDA – Earnings Before Interest Tax Depreciation and Amortisation) compare to similar operations in the destination
  - What is the detailed breakdown of the income and expenditure of the business over the last 3 – 5 years trading
  - What has the hotel's occupancy and Achieved Room Rate been
  - What markets has the hotel attracted and what have been the trends in these markets

- How does occupancy, ARR and market trend compare with other hotels in this area and in the destination as a whole
- What are the main reasons for a decline in demand and profitability and under-performance compared to benchmark establishments

This information could be provided by:

- *Independent consultant/accountant to review performance and input industry/local comparator performance data*
- *Tourism Team re market analysis and overview*
- *Demand monitor – could be run by the Council Tourism Team, Tourism South East or an independent consultancy – to collect occupancy and ARR data*
- *Hotels Association/individual hotel operator 'beacons' – to provide examples of benchmark property performance*

- **Management**

  Has the management of the business contributed to its demise, and if so could it be viable with a more professional approach to its operation?

  - Do the owners/managers have a background in hotels and the appropriate skills for the business
  - Have they/their staff made use of training opportunities
  - Have the owners/managers taken business advice to find a route to secure the future of the business
  - Are there Business Plans in place and clear attempts to deliver these

  This information could be provided by:

  - *Independent hotel/business advisor/accountant*
  - *Tourism Team*

- **Marketing**

  Has there been a concerted attempt to attract tourist business using the normal routes for a business of this size and nature

  - Is there a Marketing Plan in place
  - Is the hotel inspected and graded under the Tourist Board/AA/RAC schemes or any locally implemented grading scheme in the destination

- Does the business work with the TIC and provide details of availability
- Is there a minimum marketing package in place eg advertising in local destination guide, own brochure, own website, participation in Tourist Board marketing campaigns
- How does the hotel's marketing package and marketing spend compare with benchmark hotels

This information could be provided by:

- *Independent hotel/business advisor/accountant*
- *Tourism Team*

- **Sale as a Going Concern**

  Has the business been adequately marketed as a going concern

  - Has a reputable agent been used
  - Is the price being asked realistic
  - Has the property been on the market for at least 12/18 months
  - Have similar properties sold in this period
  - What is the market currently like for the sale of businesses of this type/size/location

  This information can be provided by:

  - *Local/specialist hotel agent*
  - *Monitor of supply – Tourism Team/independent consultant*

- **Viability**

  Is the business viable in its current form and/or is it capable of being so in the future

  - What is the underlying profitability of the current business, and is this in line with industry norms in the destination and sufficient to support a viable and sustainable business
  - What levels of profitability could be achieved with adequate marketing, professional management and the right investment in the offer; could this business be viable and sustainable in the future

  This information could be provided by:

  - *Independent hotel advisor/accountant*
  - *Benchmark data*

N.B. In drawing together and assessing the above information on the management, marketing and viability of the business, the experience from Bournemouth suggests that it is important to base this on the performance levels that could be reasonably expected from an Average Competent Operator. This ensures that the projections are reasonable and do not assume an abnormally high level of business expertise.