WILTSHIRE & SWINDON
VISITOR ACCOMMODATION FUTURES

Appendices - Final

Prepared for:
VisitWiltshire
Swindon & Wiltshire LEP

June 2014

hotel solutions
the hotel development consultancy

CONTENTS

APPENDICES

hotel solutions
the hotel development consultancy

Lynn Thomason
Hotel Solutions
Deleanor House
High Street
Coleby
Lincoln
LN5 0AG
t. 01522 811255
e. hotel@tourismsolutions.co.uk

Andrew Keeling
Hotel Solutions
Mill Field House
Mill Fields
Bassingham
Lincoln
LN5 9NP
t. 01522 789702
e. ackeeling@btinternet.com

APPENDIX 1

HOTEL & VISITOR ACCOMMODATION BUSINESSES INTERVIEWED

ESTABLISHMENT	LOCATION	PERSON INTERVIEWED	FACE-TO-FACE/TEL
Hotels			
Lucknam Park	Colerne	Peter White	F
Woolley Grange	Woolley Green, Bradford-on-Avon	Clare Hammond	F
Bowood Hotel, Golf & Spa	Bowood	Judith Speller	F
Bishopstrow House	Warminster	Jason Thorley	F
The Rectory Hotel	Crudwell, Malmesbury	Jenna Tomlin	T
The Pear Tree	Purton	Alix Young	T
Howards House Hotel	Teffont Evias	Simon Greenwood	T
Jurys Inn	Swindon	Peter Rudge	F
Village Urban Resort	Swindon	Andrew Spink	T
Best Western Mayfield House	Crudwell, Malmesbury	Frank Seagrave-Daly	F
The Old Bell	Malmesbury	Simon Haggarty	F
Rudloe Arms	Corsham	David Thorneycroft	F
Antrobus Arms	Amesbury	Bob Santon	T
Castle & Ball	Marlborough	Nigel Forrester	F
Best Western Leigh Park	Bradford-on-Avon	Pamela Duckett	F
Beechfield House	Beanacre, Melksham	Chris Whyte	F
Bear Hotel	Devizes	Lee Fenn	F
Lansdowne Strand	Calne	June Notman	T
Best Western Plus Angel	Chippenham	Damian Kay	T
The Wiltshire Hotel	Royal Wootton Bassett	Cine Dunkley	T
Marsh Farm	Royal Wootton Bassett	Peter Neil	F
Holiday Inn Salisbury	Amesbury	Marc Solarz	F
Mercure White Hart	Salisbury	Mark Posslethwaite	F
Legacy Rose & Crown	Salisbury	Derek McNeill	F
Milford Hall	Salisbury	Simon Hughes	F
Red Lion Hotel	Salisbury	Mark Bramley	F
Grasmere House Hotel	Salisbury	Dale Naug	F
The Cathedral Hotel	Salisbury	Tony Negal	F
King Head Inn	Salisbury	Cathy Cooper	F
Citylodge	Salisbury	Agnieska Zieniewic	F
Travelodge Amesbury	Amesbury	Dawn Healey	T
Travelodge Devizes	Devizes	Ramona	F
Premier Inn Chippenham	Chippenham	Lauren Jacomb	F
Premier Inn Salisbury	Salisbury	Kieran Bailey	F
Premier Inn Swindon North	Swindon	Jason Darkes	T
Premier Inn Swindon Central	Swindon	Jason Darkes	T
Premier Inn Swindon West	Swindon	Jason Darkes	T
Castle Hotel	Devizes	John Hume	F
Chalford House Hotel	Westbury	Rachel Baker	F
The Polebarn Hotel	Trowbridge	Natasha Owen	F
Hilbury Court	Trowbridge	Debie & John Fox	F
Fieldways Hotel	Trowbridge	Lorna Coleman	F
Bell House Hotel	Sutton Benger	Chris Williams	F

ESTABLISHMENT	LOCATION	PERSON INTERVIEWED	FACE-TO-FACE/TEL
Boutique Inns			
White Hart	Ford, Chippenham	Adam Ford	T
King John Inn	Tollard Royal, Salisbury	Anne Wills	T
Methuen Arms	Corsham	Debbie Still	T
Horse & Groom	Charlton, Malmesbury	Katie Pasternkewicz	T
Beckford Arms	Tisbury	Dab Broad	T
The Lamb at Hindon	Hindon	Alice Draper	T
Bath Arms	Horningsham, Warminster	Michelle Elston	T
Three Daggers	Edington, Westbury	Jackie Cosens	T
The Bell at Ramsbury	Ramsbury, Marlborough	Matt Saxton	T
Castle Inn	Bradford-on-Avon	Tori Hill	T
Castle Inn	Castle Coombe	Hakan Teryaki	F
Pear Tree Inn	Whitley, Melksham	Letty White	F
Other Inns/ Pub Accommodation			
The Swan	Bradford-on-Avon	James Sullivan-Taylour	T
Tollgate Inn	Holt, Bradford-on-Avon	Laura Bolton	T
Kings Arms Hotel	Malmesbury	Mark Hedges	T
The Swan at Stoford	Stoford, Salisbury	Dan King	T
B&Bs/ Guest Houses			
Cathedral View	Salisbury	Steve Rampton	F
St Ann's House	Salisbury	Michael Riley	F
Rokeby Guest House	Salisbury	Karen Rogers	F
Edwardian Lodge	Salisbury	Richard White	T
Taylor's Guest House	Salisbury	Steve Taylor	T
Victoria Lodge	Salisbury	Carole Minto	T
Quidhampton Mill	Salisbury	Lesa Drewett	F
Newton Farmhouse	Whiteparish	Lizzie & David Gould	F
The Merlin	Marlborough	Frances Ivens	F
Poulton Grange	Marlborough	Deborah Shepherd	F
Rockley Manor	Rockley, Marlborough	Beth Grew	T
Rollestone Manor	Shrewton	Paula Portier	F
Whaddon Grove House	Melksham	Lorraine Jenkins	F
Well House Manor	Melksham	Graham Ellis	T
Blounts Court Farm	Potterne, Devizes	Caroline Cary	T
Rosemundy Cottage	Devizes	Tony Aldridge	T
Dorchester House	Devizes	Deborhah Dobson	T
Brookes Farm	Seend, Devizes	Marie-Anne	T
Fairlawn House	Amesbury	Tracey & Keith Pullen	T
Mandalay Guest House	Amesbury	Nick Ramplin	T
Little Langford Farmhouse	Little Langford, Salisbury	Patricia Hellier	T
Manor Farm	Collingbourne Kingston, Marlborough	James Macbeth	T
Brunton Farmhouse	Collingbourne Kingston, Marlborough	Pippa Novis	T
Great Ashley Farm	Bradford-on-Avon	Helen Rawlings	T
Forge House	Southwick, Trowbridge	Sharon Cornelius	F
Ruchall Manor	Rushall, Pewsey	Caroline Larken	T
Ridgewood Park	East Knoyle, Salisbury	Simon Sturdy	T
The Old Rectory	Coulston, Westbury	Helle De Chazal	T

ESTABLISHMENT	LOCATION	PERSON INTERVIEWED	FACE-TO-FACE/TEL
Self Catering			
Hideaways		Nick Pash	T
Sykes Cottages		Stuart Glover	T
Hoseasons		Chris Farrar	T
Parsonage Farm Holiday Cottages	Clyffe Pypard, Royal Wootton Bassett	Debbie Munro-Knapp	T
Church Farm Cottages	Winsley, Bradford-on-Avon	Trish Bowles	F
Hook Farm Cottages	Hook, Royal Wootton Bassett	Jane Woolford	F
St James Court	Tytherington, Warminster	Anna Giddings	F
Merkins Farm	Bradford Leigh, Bradford-on-Avon	Hayley Painter	T
Manor Farm Holiday Cottages	Corston, Malmesbury	Ross Eavis	T
Alma Barn	Aldbourne, Marlborough	Fenella Elms	T
Mead Cottage	Castle Coombe	Barbara Turner	T
Maunditts Park Farm	Little Somerford, Chippenham	Ben Marsh	T
Ebblesway Courtyard	Broad Chalk		
St Anne's Forge	Salisbury		T
Sheldon Manor	Chippenham	Caroline Hawkins	T
Long Park Castle	Longs Ashton, Trowbridge		
Holiday Lodges/ Holiday Lodge Parks			
Willowbank Lodges	Pewsey	Nicky Wood	F
Poulton Lodge	Marlborough	Deborah Sheppard	F
Hunters Moon Lodges	Henfords Marsh, Warminster	Nick Clift	T
The Wiltshire Leisure Village	Royal Wootton Bassett	Jennifer Shah	T
Touring Caravan & Camping			
Coombe Caravan Park	Salisbury	Margaret Haytor	P
Stonehenge Campsite	Berwick St James	William Grant	P
Green Hill Farm Caravan & Camping	Landford	Lorna Lee	P
Stonehenge Touring Park	Orcheston	Julie Young	T
Longleat Caravan Club Site	Longleat	Myrah Russell	T
Foxhangers	Devizes	Cynthia Fletcher	F
Alderbury Camping & Caravanning Park	Whaddon, Salisbury	Neil Campbell	T
Salisbury Camping & Caravanning Club Site	Salisbury	Nigel Elliott	T
Piccadilly Caravan Park	Lacock	Debbie	T
Merkins Farm	Bradford Leigh, Bradford-on-Avon	Hayley Painter	T
Burton Hill Caravan & Camping Park	Malmesbury	Alison Simmons	T
Brokerswood Country Park	Southwick, westbury	Pauline Flemming	T
Midbrooks	Trowbridge	Susan Dell	T
Plough Lane Caravan Site	Kington Langley, Chippenham	Helen Wilding	T
Bell Caravan & Camping Park	Lydeway, Devizes	Lesley Nash	T
Summerlands Caravan Park	Coombe Bissett, Salisbury	Barbara Ely	T
Glamping			
Stonehenge Camp Site	Berwick St James	William Grant	F
The Blackberries Camping Park	Monkton Farleigh	Adrian Orchard	T
The Farm Camp	Winsley, Bradford-on-Avon	Tim Bowles	T
White Horse Gypsy Caravans	Alton Priors, Marlborough	Polly Carson	T
Group Accommodation			
YHA Salisbury	Salisbury	Vince Buckley	T
Cholderton Youth Hostel	Cholderton	Sophie MConnell	T
Sarum College	Salisbury	Christine Nielsen-Craig	P
Braeside Education & Conference Centre	Devizes	Keith Browning	T

ESTABLISHMENT	LOCATION	PERSON INTERVIEWED	FACE-TO-FACE/TEL
Canal Boat Holiday Operators			
Waterways Holidays		Nigel Richards	T
Sally Narrowboats	Bradford-on-Avon	Jamie Smith	T
Wiltshire Narrowboats	Bradford-on-Avon	Phil Holman	T
Moonraker Canalboats	Honey Street, Pewsey Vale	Nicki Weir	T
Black Prince Holidays	Bradford-on-Avon	Leyton Jones	T
Hotel Boats			
Wessex Rose	Kennet & Avon Canal	David Binney	T
Canal Boat Marinas			
Caen Hill Marina	Caen Hill, Devizes		T

APPENDIX 2

EXTRACT FROM DCLG GOOD PRACTICE GUIDE ON PLANNING FOR TOURISM

Tourist Accommodation

1. Tourism accommodation takes many different forms, including hotels, guesthouses and bed and breakfast premises, self-catering, touring and static caravans and camping, and caters for a variety of tastes and budgets. But all are capable of bringing economic benefits to the areas in which they are located. These benefits will need to be assessed alongside other issues such as suitability of the location in terms of its sustainability.

2. The issues that will need to be addressed in considering planning applications or tourist accommodation will vary according to the type, size, and nature of the accommodation being provided. These are considered further below.

Hotel and serviced accommodation

GENERAL LOCATIONAL PRINCIPLES

3. The process of identifying suitable locations for hotel and serviced accommodation, whatever its nature, should be an integral part of the plan making process. Local planning authorities and the tourist industry should therefore engage constructively to identify suitable locations in plans for hotel accommodation to meet identified current and future needs. This is particularly important for major hotels – for example those with business, conference and banqueting facilities, or large hotels catering for tourists – where the preference should be to identify town centre sites wherever possible, in line with national policies set out in PPS6. Such sites are the most sustainable in planning terms, since they allow greater access by public transport, contribute to urban vitality and regeneration, and allow visitors to easily access other town centre facilities and attractions. Where proposals for major hotel facilities come forward outside the development plan process, their location should be assessed in line with the policies in PPS6 and the sequential approach to site selection.

4. Proposed locations for other types of hotel and serviced accommodation should also be considered through the plan process wherever possible. The emphasis, whatever the type of accommodation, should be on identifying the most sustainable locations, having regard to national planning policies. But in allocating sites in plans, or considering planning applications that come forward outside of the plan process, developers and planning authorities need to recognise that the particular market being met by the accommodation may influence the nature of the location chosen. So, for example, accommodation catering for those seeking to enjoy the natural environment through walking and outdoor recreation may be better located in a rural area, in or at the edge of the centre of a village or small town, rather than in a major town centre some distance away from the attractions it serves.

5. Whatever the type of hotel or serviced accommodation and whatever its location, it should:

- Fit well with its surroundings, having regard to siting, scale, design, materials and landscaping; and
- Be in harmony with the local environment (taking account of, amongst other factors, residential amenity, noise, traffic and parking in the vicinity).

HOTEL ACCOMMODATION IN RURAL AREAS

6. National planning policies set out in PPS7 *Sustainable Development in Rural Areas* makes it clear that the expectation is that most tourism accommodation requiring new buildings should be located in, or adjacent to, existing towns and villages. PPS7 also recognises that proposals to convert existing rural buildings to provide hotel and other serviced accommodation should be acceptable, subject to any general criteria that may be set in development plans on the re-use of such buildings.

7. National Parks and Areas of Outstanding Natural Beauty attract visitors who wish to enjoy the special qualities of the landscapes and the countryside of these areas. It is important that sufficient accommodation of a suitable range of types is provided for these visitors. However, particular care needs to be taken over the number, scale and location of accommodation facilities in these designated areas to ensure that the particular qualities that justified the designation are conserved. These considerations are best addressed through the plan process wherever possible.

HISTORIC TOWNS AND CITIES

8. Historic towns and cities are an attraction to tourists from home and overseas and there is pressure to increase hotel accommodation in them. Great importance is attached to the preservation of buildings of architectural or historic interest both for their intrinsic qualities and for the contribution they make to our towns and villages, and to tourism. It is therefore important that any proposals for new hotel accommodation in such towns and cities are sensitive to their surroundings.

9. Conversion into hotels is often a realistic proposition for ensuring the retention and maintenance of historic buildings provided it is sensitively handled, does not materially alter the character or historic features of the building, and provided the new use does not generate traffic movements which cannot be accommodated.

10. Many historic buildings in town and country are already in use as hotels. If carefully designed, additions can be achieved without adversely affecting the historic fabric or character and maintain the historic building in viable use. But large-scale buildings in a small-scale setting, buildings which adversely affect the existing skyline, and those which by their design, materials, illumination or building line are out of sympathy with neighbouring historic buildings will normally be unacceptable.

MODERNISATION AND EXTENSIONS

11. Aside from historic buildings, there are many redundant or semi-obsolete buildings – such as closed mills, distilleries, warehouses, or railway stations – that can lend themselves well to adaptation and modernisation as hotels, other forms of serviced accommodation or restaurants. To convert such buildings to compatible use can bring life back to an otherwise wasted asset – thus conserving a useful and often attractive building, improving a neglected site and helping the local economy.

12. Similarly, moderate-sized extensions to an existing hotel or public house, including the addition of bedroom accommodation, can help to ensure the future viability of such businesses. This may satisfy a local need as well as a tourism one, by fully utilising the potential of the site but without any disproportionate increase in scale. In all cases, careful consideration should be given to ensure that the size of the extension proposed is not disproportionate for the location concerned.

BUDGET HOTELS, MOTELS, AND TRAVEL LODGES

13. Where budget hotels are designed to cater for longer stays at a destination (for example, those catering for visitors to historic towns and cities), their location should be considered in light of policies in the development plan and national policies in PPS6 on town centres. Location of such hotels in town centres maximises the opportunities for visitors to easily access other town centre facilities and attractions.

14. Other types of budget hotels and similar types of development such as motels and travel lodges cater more for car-born travellers, often for a single overnight stay – e.g. business travellers en-route to a destination. In such cases, the preference of developers will be for sites on major traffic routes outside of the centre of large towns or tourist centres. However the aim should be to make any development as sustainable as possible, and it will not normally be appropriate for such developments to be located in open countryside away from major settlements. Edge of town centre locations, for example on a ring road or on a major route out of the town centre, will usually be the most appropriate locations if a town centre location is not suitable, available or viable.

15. For out-of-centre locations, design and layout of the development is likely to be of considerable importance in deciding whether it is acceptable in planning terms. Depending on the setting, an open layout in which careful attention has been paid to achieving a high standard of design and landscaping is likely to be more acceptable than a dense concentration of buildings.

16. Where a proposal includes other new facilities, such as a petrol station or shop, these will have to be considered on their own merits. If they are objectionable in themselves, the fact that they are combined with a hotel will not remove the objections. Restaurants, fast food outlets, leisure, fitness and other facilities open to the general public as well as residents are also sometimes combined with hotel proposals, in which case the extra traffic they are likely to generate and its effect on the highway must also be taken into account.

CAR PARKING

17. Maximum car parking standards for hotel and serviced accommodation may be included in development plans. Where such standards are not included in plans, planning authorities will need to consider what are appropriate levels of parking, based on the market which the hotel serves, its location and availability of public transport facilities. In addition, for those hotels where a substantial part of the parking needs are attributable to public rooms used mainly for functions which attract non-residents, then the availability of public parking in the vicinity of the hotel will also need to be taken into account.

18. Planning authorities should also take account of the proposed arrangements for service loading and unloading and setting down space for visitors. Organised tours demand adequate loading and unloading facilities for coaches. Access and waiting areas should be designed with this in mind. Access points should be sited so as to minimise turning movements across traffic and to avoid congestion of the highway caused by vehicles queuing to pick up or drop passengers. Developers should discuss proposed access arrangements with the highway authority at the earliest possible stage.

Holiday, touring caravan, and chalet parks

19. In the UK as a whole, the parks industry accounts for tourist spend of some £3.23 billion[1]each year, accommodating some 22% of all holiday bed nights. The industry comprises holiday chalets, caravan holiday homes, pitches for touring caravans, motor-homes and tenting and all types of self-catering accommodation. Holiday parks are the largest provider of rural tourism bed spaces.

20. PPS7 provides advice for planning policies and development proposals for static holiday and touring caravan parks and holiday chalet developments. Planners should carefully weigh the objective of providing adequate facilities and sites with the need to protect landscapes and environmentally sensitive sites. They should examine the scope for relocating any existing visually or environmentally intrusive parks away from sensitive areas, or for re-location away from sites prone to flooding or coastal erosion. However, the high land values associated with holiday parks, the cost of infrastructure and possible planning issues relating to a proposed site may make such proposals impractical and unviable.

21. This advice recognises that planning provides an opportunity to improve the attractiveness of such developments to those who visit them and as features in the landscape. The *Environmental Code for Holiday parks, Caravan and Camping Sites, and Park Home Estates*[2] advises park owners on fulfilling the industry's commitment to environmental protection. *Holiday Parks: Caring for the Environment – a guide to good practice* (1991), published by the Countryside Commission, remains an important reference document that includes many case studies directing holiday park operators toward best practice. Planners should work with owners and developers of sites to ensure that the most is made of these opportunities. Where there is an identified demand for new or expanded sites, planners should ensure that environmental impacts and impacts on visual amenity are minimised.

[1] UKTS 2002

[2] Park home estates are outside the scope of this guide as they are residential and not tourist developments

22. New sites that are close to existing settlements and other services will generally be more sustainable as some local services may be accessed by means other than by car. Similarly caravan storage facilities that are close to existing settlements may have less adverse impact and be more sustainable. However, there may be valid reasons for extending or improving existing holiday parks that are not be located close to existing settlements by virtue of their support for successful local businesses and the provision of employment. Authorities should also consider how the proposal will affect tourism in the area, particularly in terms of its economic and environmental impacts.

23. Local planning authorities may attach conditions to planning permissions for holiday parks to ensure that they are used for holiday purposes only. However, with better caravan standards and the trend towards tourism as a year round activity, authorities should give sympathetic consideration to applications to extend the opening period allowed under existing permissions. Annex B covers these matters in more detail.

STAFF ACCOMMODATION

24. For many types of holiday parks, a residential managerial presence is often essential, to achieve quality service to the customer, security for the property, and to meet the obligations of health and safety regulations. Accommodation may sometimes also be needed for key members of staff. As far as possible, suitably located existing dwellings should be used to meet these accommodation needs. But where this is not a feasible option, and particularly in locations where suitable housing is not available, or is unaffordable, it may be necessary to provide new, on-site accommodation for managerial and/or other staff. In such cases the conversion of any suitable available existing buildings should be considered first in preference to the construction of new and potentially intrusive housing development in the countryside.

25. PPS7 makes it clear that isolated new houses in the countryside require special justification for planning permission to be granted. PPS7 further states that one of the few circumstances in which isolated residential development may be justified is when accommodation is required to enable agricultural, forestry and certain other full-time workers to live at, or in the immediate vicinity of their place of work. There will be some cases where the nature and demands of the work concerned make it essential for one or more people engaged in a tourism enterprise to live at, or very close to, the site of their work. Local planning authorities should give consideration to the essential needs of all businesses located in rural areas, including tourism and should apply the policies set out in PPS7 – in particular those in Annex A. Planning conditions can ensure that such accommodation is occupied for this purpose only.

Other forms of self-catering accommodation

26. PPS7 advises that local planning authorities should support the provision of other forms of self-catering holiday accommodation in rural areas where this would accord with sustainable development objectives. The re-use and conversion of existing non-residential buildings for this purpose may have added benefits, e.g. as a farm diversification scheme.

Seasonal and Holiday Occupancy Conditions

1. The nature of holidays in this country has become increasingly diverse, in location, in season and in duration. Many people go away several times a year, often for short breaks and not exclusively in the summer months. Much of this demand is for self-catering accommodation – whether in new or converted buildings or in caravan holiday homes. This spread of demand improves the use that is made of this accommodation and so is advantageous to the businesses which provide it and to those host communities which are supported by the spending that it generates. It can help to reduce the disadvantages of seasonal employment, including the difficulties of retaining trained and experienced staff.

2. Whilst extension of the season has these advantages, the demand for this accommodation may occur in areas in which the provision of permanent housing would be contrary to national or local policies which seek to restrict development, for example in order to safeguard the countryside. The planning system can reconcile these two objectives through the use of occupancy conditions designed to ensure that holiday accommodation is used for its intended purpose. Planning authorities commonly impose such conditions when granting permission for self-catering holiday accommodation. Chapter 6 above explains the general use of conditions with planning permissions.

3. One type of condition frequently used for holiday accommodation, particularly in holiday areas, is known generically as a 'holiday occupancy condition'. The aim of such conditions is generally to ensure that the premises are only used by visitors and do not become part of the local housing stock. There are three principal reasons why a planning authority might seek to do this:

- in order that national or local policies on development of the countryside are not compromised. Often the conversion of redundant rural buildings to holiday accommodation provides a means to retain those buildings without introducing a level of activity that would occur with permanent households;
- to avoid occupation by permanent households which would in turn put pressure upon local services. Permanent households may place demands for local schools and social and health services that would not normally arise from visitors. Moreover, in remote locations the cost of providing these services is greater. It may therefore be

reasonable for the planning authority to place an occupancy condition when properties are being built or converted for residential use; and

- to strengthen tourism in a particular area by ensuring that there is a wide range of properties available to encourage visitors to come there on holiday.

Planning authorities will frame these conditions according to local circumstances, and in accordance with general Government advice that conditions should be reasonable and fair. They will also need to frame them so that they can be readily enforced by the authority but in a way that is not unduly intrusive for either owners or occupants.

Controlling use of holiday caravan and other holiday park accommodation

East Riding of Yorkshire Council established a joint working group to establish the best approach to secure holiday use of caravan parks. This group comprised councillors and council officers; representatives from the British Holiday and Homes Parks Association Ltd; the park operators and their agents; and the caravan manufacturers. It concluded that planning conditions needed to be stronger, requiring documentary evidence of occupiers maintaining a primary residency elsewhere to be provided. As a result the planning committee agreed that future planning permissions for holiday caravan parks, holiday log cabins and holiday chalets shall normally be subject to the following conditions:

(i) the caravans (or cabins/chalets) are occupied for holiday purposes only;

(ii) the caravans (or cabins/chalets) shall not be occupied as a person's sole, or main place of residence;

(iii) the owners/operators shall maintain an up-to-date register of the names of all owners/occupiers of individual caravans/log cabins/chalets on the site, and of their main home addresses, and shall make this information available at all reasonable times to the local planning authority.

The reason for these conditions is to ensure that approved holiday accommodation is not used for unauthorised permanent residential occupation. The register required in (iii) above shall normally be collected by the caravan site licence holder or his/her nominated person.

4. Another type of condition that may be appropriate for tourist areas is known as a 'seasonal occupancy' condition. This would seek to restrict use of holiday accommodation during particular times of year, perhaps to protect the local environment. This could be used if, for example, use of the premises or the site might affect an important species of bird during its breeding season or when it is winter feeding. Local planning authorities will need to balance the need to impose seasonal occupancy conditions with the wish to avoid exacerbating the seasonal nature of tourism in the locality and its possible adverse effects upon local businesses and jobs.

APPENDIX 3

EXTRACT FROM PRACTICE GUIDANCE ON NEED IMPACT & THE SEQUENTIAL APPROACH – Appendix C: Assessing the Scope for Other Town Centre Uses

vii) Hotels

c.48 There is a range of different types of hotel accommodation, as recognised in the practice guidance on planning for tourism. When planning for new hotel accommodation it is important to understand the future need and market demand for a broad range of new facilities so that appropriate provision can be made for their future development and new applications for development can be assessed against any established need.

c.49 A general indication of need can be derived through 'gap analysis' and a planning authority should consider whether there is an absence or paucity of hotel or serviced accommodation, catering to different market segments, within reasonable proximity to serve a town centre or a major visitor attractor. This involves identifying the geographical pattern of hotel room provision in a given survey area by type and standard (i.e. quality rating), and plotting imbalances and shortfalls in the provision and distribution; this 'survey area' may be a local authority's borough boundary or a sufficient drive-time 'isochrone' from the town centre or major attractor that a particular hotel proposal is intended to serve. Identifying locational need at this local level serves the purposes of sustainable development by seeking to reduce the need to travel and promoting balanced sub-regional development.

c.50 It may be relevant to refine this gap analysis on the basis of the occupancy levels per quality rating. Hotels cater to different market segments and while occupancy rates may be low at one end of the market, there may be turnaway trade occurring at the other end due to high levels of demand in that segment leading to hotels being booked up to capacity. High annualised occupancy rates (where seasonal fluctuations cause instances of turnaway trade) in a given market segment are an indication of local hotel need. Occupancy rates rise as demand for hotel facilities increases, when occupancy rates rise to the point that turn-away trade occurs in accommodation of a certain quality category there is a need for additional hotel facilities catering to that market segment.

c.51 It is possible to assess quantitative, by comparing the current and projected demand for staying visitor nights, with available and planned stock in each category. The starting point is to establish the existing stock of hotel rooms in a given survey area using a variety of data sources, and categorise them by their quality ratings to indicate which market segment they serve. Although regional assessments may wish to identify a broad need for hotel accommodation across a region, the assessment of need for hotel accommodation is normally best undertaken at local level where it may be appropriate to differentiate between the need for different market sectors (e.g. business, short stay and holiday/visitor accommodation).

c.52 The next step is to establish the existing average annualised occupancy rate per quality category (i.e. the average occupancy rate among the number of hotels in each quality category), noting the range of seasonal fluctuations in occupancy. Where occupancy levels are above optimal levels, indicated by instances of turnaway trade in a given quality category, then need is demonstrated in that specific market segment. If the occupancy levels in each quality category are within the optimal range, projected increases in visitor numbers may pressurise the existing hotel stock.

c.53 Estimates of growth in tourism and visitor activity can be identified using an econometric approach (based on global GDP projections and the consequent impact on tourism trends) and/or through discussions with the tourism industry in the context of future long-term growth trends at a regional, sub-regional and local level. Once the increase in visitor numbers is established it may be necessary to consider other factors, accounting for expected trend shifts, in order to estimate the number of extra visitor nights that the hotel provision will be expected to accommodate over a given time horizon. These include:

- Average number of staying nights spent by foreign and domestic visitors.
- Estimated percentage of visitors who stay in hotels.
- Estimated average number of people per room.

c.54 This information is used to calculate the estimated percentage increase in staying visitor nights, which can be used to grow the existing room stock in each quality category, preserving the same occupancy levels.

c.55 Having established a gross need by category, the final stage is to subtract any hotel commitments or developments coming through the pipeline (or anticipated loss of rooms) to leave a residual hotel room need in each quality category in a given survey area.

APPENDIX 4

WILTSHIRE & SWINDON HOTEL & VISITOR ACCOMMODATION PLANNING POLICIES

WILTSHIRE CORE STRATEGY (Pre-Submission, April 2014)

Core Policy 39: Tourist development
Achieving growth in Wiltshire's tourism sector

6.30 Tourism is important to Wiltshire's economy; and is worth over £779 million a year. Wiltshire has a wealth of natural and heritage assets which attract visitors from home and abroad that range from one of the world's most famous and recognisable monuments, Stonehenge, to renowned attractions such as Longleat Safari and Adventure Park to country houses, museums and gardens. Rural countryside within the AONB's, Wiltshire's canal network, historic villages such as Lacock and farm and animal attractions also draw visitors to the area. Wiltshire is also well placed for visiting attractions such as the New Forest National Park, the Cotswolds, Bath Spa and the major resorts and beaches at Bournemouth and Poole. Wiltshire's built and natural environment is a key part of the tourism product and the future success of the area's tourism industry is, in many ways, dependent on the effective management and conservation of the environment.

Policies TR6 (Tourist facilities in the Avebury World Heritage Site) and TR8 (Visitor accommodation in the Avebury World Heritage Site) of the Kennet Local Plan 2011 will continue to be saved, and should be referred to alongside Core Policies 39 (Tourist Development) and 40 (Hotels, Bed and Breakfasts, Guest Houses and Conference Facilities).

Core Policy 39 - Tourist development

Within Principal Settlements and Market Towns, proposals for tourist development of an appropriate scale, including attractions and tourist accommodation will be supported subject to a sequential assessment. Proposals for large-scale tourist development must be assessed against all the policies of this Core Strategy, including transport implications and how the proposal could assist rural regeneration and the well being of communities.

Outside the Principal Settlements and Market Towns, tourist and visitor facilities should be located in or close to Local Service Centres or Large and Small Villages and, where practicable, be located in existing or replacement buildings. Any proposal needs to carefully consider the need to protect landscapes and environmentally sensitive sites with the objective of providing adequate facilities, enhancing enjoyment and improving the financial viability of the attraction. If new buildings are required in the countryside for tourist development these should be directed towards the Local Service Centres and Large and Small Villages.

In exceptional cases development may be supported away from the Principal Settlements, Market Towns, Local Service Centres and Large and Small Villages where it can be demonstrated that all of the following criteria are met:

i. There is evidence that the facilities are in conjunction with a particular countryside attraction;
ii. No suitable alternative existing buildings or sites exist which are available for re-use;
iii. The scale, design and use of the proposal is compatible with its wider landscape setting and would not detract from the character or appearance of the landscape or settlement and would not be detrimental to the amenities of residential areas;
iv. The building is served by adequate access and infrastructure; and
v. The site has reasonable access to local services and a local employment base.

Extensions to existing facilities should be appropriate in scale to its location and help to ensure the future viability of the business, including farm diversification schemes.

Proposals for camping and touring caravan sites (including extensions) will be supported where they can be accommodated without adverse impact on the character and appearance of the landscape and meet criteria iii to v above.

Core Policy 40: Hotels, bed and breakfasts, guest houses and conference facilities

6.31 There is a lack of both budget and high quality leisure accommodation within parts of Wiltshire, particularly to the south. For example, Salisbury is less successful in attracting business visitors than other, similar destinations and does not have the conference facilities needed for large events. With respect to hotel facilities, planning permission has been too easily obtained for change of use of some hotels away from tourist provision, for example to residential use, and this is further exacerbating the shortfall in bed space.

Core Policy 40 - Hotels, bed and breakfasts, guest houses and conference facilities

Proposals for new hotels, bed and breakfasts, guesthouses or conference facilities, together with the sensitive extension, upgrading and intensification of existing tourism accommodation facilities will be supported within:
i. Principal Settlements and Market Towns; or
ii. Local Service Centres, and Large and Small Villages where the proposals are of an appropriate scale and character within the context of the immediate surroundings and the settlement as a whole; or
iii. Outside the settlements above, proposals will be supported that involve the conservation of buildings that for contextual, architectural or historic reasons should be retained and otherwise would not be.

In all cases it must be demonstrated that proposals will:
i. Not have a detrimental impact on the vitality of the town centre; and
ii. Avoid unacceptable traffic generation.

Proposals for the change of use of existing bed spaces provided in hotels or public houses or conference facilities to alternative uses will be resisted, unless it can be clearly demonstrated there is no longer a need for such a facility in either its current use, or in any other form of tourism, leisure, arts, entertainment or cultural use.

CURRENT WILTSHIRE HOTEL & VISITOR ACCOMMODATION PLANNING POLICIES

The Wiltshire Core Strategy is to be adopted in the summer of 2014, and will supercede all current policies. The current policy framework is fragmented, reflecting the status quo in terms of political boundaries prior to re-organisation – Salisbury/South Wiltshire, North Wiltshire, West Wiltshire and Kennet. The relevant documents are:

- South Wiltshire Core Strategy 2012 (Core Policy 23)
- Salisbury District Local Plan 2011 (Policies T4-T9)
- North Wiltshire Local Plan 2011 (no relevant saved policies)
- West Wiltshire District Plan 2004 (Policy TO3)
- Kennet Local Plan 2004 (Policy TR8)

Feedback from the Development Control team at Wiltshire indicated that in South Wiltshire, Core Policy 23 was the principal policy used:

Core Policy 23 - Hotels, Bed and Breakfasts, Guest Houses and Conference Facilities

Proposals for new hotels, bed and breakfasts, guesthouses or conference facilities within the SSCT and Amesbury will be supported.

Proposals for new hotels, bed and breakfasts and guesthouses within Durrington, Bulford, Local Service Centres, Secondary Villages and Small Villages will be supported where the proposals are of an appropriate scale and character within the context of the immediate surroundings and the settlement as a whole.

Permission may exceptionally be granted for proposals for new hotels, bed and breakfasts and guest houses in Other Settlements and The Countryside, where these proposals involve the conversion of buildings that for contextual, architectural, or historic reasons should be retained and would otherwise not be.

In all cases it must be demonstrated that proposals will:

- Not have a detrimental impact on the vitality of Primary Shopping Frontages or the viability of existing hotels, bed and breakfasts, guesthouses or conference facilities, and
- Avoid unacceptable traffic generation and/or climate change effect through emissions.

Proposals for the change of use of existing bed spaces provided in hotels or public houses or conference facilities to alternative uses will be resisted, unless it can be clearly demonstrated there is no longer a need for such a facility in either its current use, or in any other form of tourism, leisure, arts, entertainment or cultural use

In North Wiltshire ie Chippenham etc,, we understand there are no saved policies on tourism and therefore decisions are reliant on guidance contained within the NPPF until the Wiltshire Wide Core Strategy comes into force.

In the Central area there has only really been one major proposal for a hotel which was for the Premier Inn at the cinema complex in Trowbridge. At that time the old local plan policies were applied. However as the Wiltshire Core Strategy gets nearer to being adopted it gains weight and will increasing be used to guide development.

Core policy 21 (as applies to retention of hotels and tourist accommodation)

Core Policy 21- Protection of Services and Community Facilities

Proposals involving the loss of a community service or facility will not be permitted unless it can be demonstrated that the site/ building is no longer viable for an alternative community use.

Preference will be given to retaining the existing use in the first instance, then for an alternative community use. Where this is not possible, a mixed use, which still retains a substantial portion of the community facility/service, will be favoured. Redevelopment for non-community service/ facility use will only be permitted as a last resort and where all other options have been exhausted.

In order for such proposals to be permitted, a comprehensive marketing plan will need to be undertaken and the details submitted with any planning application. Only where it can be convincingly demonstrated that all preferable options have been exhausted will a change of use to a non -community use be considered. This marketing plan will, at very minimum:

- Be undertaken for at least 6 months.
- Be as open and as flexible as possible with respect of alternative community use.
- Establish appropriate prices for the sale or lease of the site or building, which reflect the current or new community use, condition of the premises and the location of the site.
- Demonstrate the marketing has taken into account the hierarchy of preferred uses stated above.
- Clearly record all the marketing undertaken and details of respondents, in a manner capable of verification if requested.
- Provide details of any advertisements including date of publication and periods of advertisement
- Offer the lease of the site without restrictive rent review and tenancy conditions, or other restrictions which would prejudice the reuse as a community facility
- Demonstrate contact with previously interested parties, whose interest may have been discouraged by onerous conditions previously set out.

SWINDON PLANNING POLICY

SWINDON BOROUGH COUNCIL LOCAL PLAN 2026
(Pre-Submission Document, December 2012)

Policy EC3: The Role of the Centre and Town Centre Uses

a. Proposals for main town centre uses8 (not including offices covered by Policy EC2c above) outside Swindon Central Area shall be permitted:

- where they do not harm or undermine the regeneration of Swindon's Central Area; and,
- where they do not undermine the vitality and viability of existing District, Primary Rural Centres and Local Centres; and
- a sequential approach to site selection has been undertaken and demonstrated, where a proposal's delivery is not dependant on location at a specific site because its use is tied to that location, in order of preference and priority

as follows:
1. Swindon Town Centre;
2. Edge of Town Centre;
3. District and Primary Rural Centres: Cavendish Square, Gorse Hill, Highworth Town Centre, Orbital Retail Park, Old Town, West Swindon, Wroughton Village Centre and the Eastern Villages District Centre
4. Local Centres: as shown on the Proposals Map including those at Wichelstowe, Commonhead, Tadpole Farm and Kingsdown developments

b. Outside the defined hierarchy of centres:
- proposals for new single shop units (A1-Use Class) will be permitted where it can be demonstrated that they provide only for the daily shopping needs of the local population and do not harm the vitality and viability of existing centres; and
- existing single shop units (A1-Use Class) will be protected from changes of use to non-A1 uses, where the proposed use is not compatible with the local area in which it is set.

c. To protect the shopping function of the Town Centre and other
centres, as defined on the Proposals Map:
- in Swindon Town Centre, Class A1 uses should occupy at least 75% of the primary frontage and 60% of the secondary frontage;
- in District and Primary Rural Centres Class A1 uses should occupy at least 70% of the street frontage; and,
- in Local Centres Class A1 uses should be predominant. Proposals for non-class A1 uses will be permitted only where they enhance the local retail centre function and do not by themselves or cumulatively harm the vitality and viability of the centre's retail function.

d. All retail development proposals with a floorspace exceeding 600m2 should be ccompanied by a Retail Impact Assessment to ensure they would not have an adverse impact on Swindon Town Centre or hierarchy of centres.

e. Within Swindon Town Centre, or any District or Primary Rural centre, where the percentage of the street frontage is already at or below the threshold of the desired

Class A1 Uses (retail) identified above, proposals for more than 323m2 for non-A1 uses will normally be permitted where they demonstrate that:

- at least 12 consecutive months active marketing of the premises for Class A1 Use (retail) has been undertaken; and,
- the proposed use is appropriate for its location.

f. Street trading will be permitted where it satisfies other development management policies, and is in accordance with the adopted Street Trading & Ancillary Retail Kiosks Development Management Guidance Note.

Policy SD2: The Sustainable Development Strategy

a. Recognising its role and function in the wider area development in the Borough will be concentrated at Swindon through a combination of:

- realising development opportunities within Swindon's urban area; and
- allocated strategic sites at; Wichelstowe, Commonhead, Tadpole Farm, Kingsdown and the proposed New Eastern Villages, Rowborough and expanded South Marston, as defined on the Key Diagram.

b. The Swindon Central Area, as defined on the Key Diagram and at Figure 7, will be the main focus and first preference for the location of built civic, cultural, further education, office, retail, leisure and regional sports facilities.

c. Outside Swindon:

- rural development will be located primarily at Highworth and Wroughton, which (of the rural settlements) are the most accessible and maintain the largest range of facilities;
- South Marston will be extended as part of the allocated strategic extension sites in part a. above;
- development at Broad Blunsdon, Chiseldon, Wanborough and Bishopstone will be supported where it delivers (at least) the quantum of development identified in the Plan and responds positively to address local needs through the Neighbourhood Plan process or further site allocation work as detailed in policy LN1; and,
- development proposals in rural and countryside locations outside these named settlements will be permitted where:
    - o local needs have been identified and allocated through a Neighbourhood Plan or Neighbourhood Development Order; and /or
    - o it supports the expansion of tourist and visitor facilities in appropriate locations where identified needs are not met by existing facilities in rural service centre; or
    - o the proposals satisfy the policy requirements of this Plan.

d. Sustainable economic and housing growth will be delivered in Swindon Borough during the plan period through the provision of:

- 119.5 hectares of employment land (B-use class) through:
  o 77.5 hectares of additional employment land3; and,
  o 42 hectares with extant permission and existing allocations carried forward (see Table 2)
- About 22,000 dwellings between 2011 and 2026, phased as follows:
  o 1,150 average per annum between 2011 and 2016; and,
  o 1,625 average per annum between 2016 and 2026.

e. This quantum of employment land and dwelling numbers for the period 2011-26 will be distributed as set out below:

e. This quantum of employment land and dwelling numbers for the period 2011-26 will be distributed as set out below:

Table 1. Housing and Employment Land Distribution

	Dwellings	Additional Employment Land[4] & Floorspace Employment
Swindon's Central Area	about 1,000	90,000 m^2 office
Remainder Swindon's existing urban area	about 3,500	
Northern Development Area	589	
Wichelstowe	4,064	12.5 hectares
Commonhead	890	15 hectares
Tadpole Farm	1,695	5 hectares
New Eastern Villages	about 6,000	about 40 hectares
Rowborough	about 1,500	
South Marston Village: Greenfield Brownfield	500 about 140	
Kingsdown	about 1,650	
Highworth	at least 200*	5 hectares
Wroughton	at least 150*	
Other Villages	at least 100*	

Policy SC1: Swindon's Central Area

In order to improve and enhance Swindon's Central Area:

a. High quality design shall be required of all new development in Central Swindon, in particular delivering clearly defined public and private space, improved public realm and access for all.

b. The following areas will have their own specific role within Swindon's Central Area:
- The Retail Core - the focus of retail-led development;
- The Promenade (Cultural Quarter) - the focus for cultural activities, but will also provide civic and leisure facilities;
- The Commercial Quarter - the focus for a flagship new office area;
- The Railway Corridor - the focus for a vibrant, high-density, mixed-use development scheme;
- North Star - the location for a new regional leisure facility;
- Railway Heritage Area - the focus of visitor activities that are sympathetic to the historic character of the area, would not adversely impact on the amenity of Railway Village residents, and would complement and not undermine the Town Centre offer; and
- Old Town - the focus niche shopping and leisure uses, complementing the shopping and leisure offer in the Town Centre.

c. Provision shall be made in the Central Area for:
- at least 53,700m2 net comparison retail floorspace in the Town Centre Primary shopping area (Retail Core);
- at least 90,000m2 of new office floorspace;
- about 1,000 additional homes;
- a new bus interchange;
- a new 1,000 space car park to the north of the railway line; and a community wide approach to renewable energy.

d. A 'Green Spine' will provide:
- a primary north-south green route that will link Old Town, the Town Centre and North Star; and
- a focal point connecting Swindon's green infrastructure corridors

e. High quality, safe and continuous pedestrian routes and cycling networks will be provided, including:
- a new rail crossing to address the severance from the Town Centre to North Star.

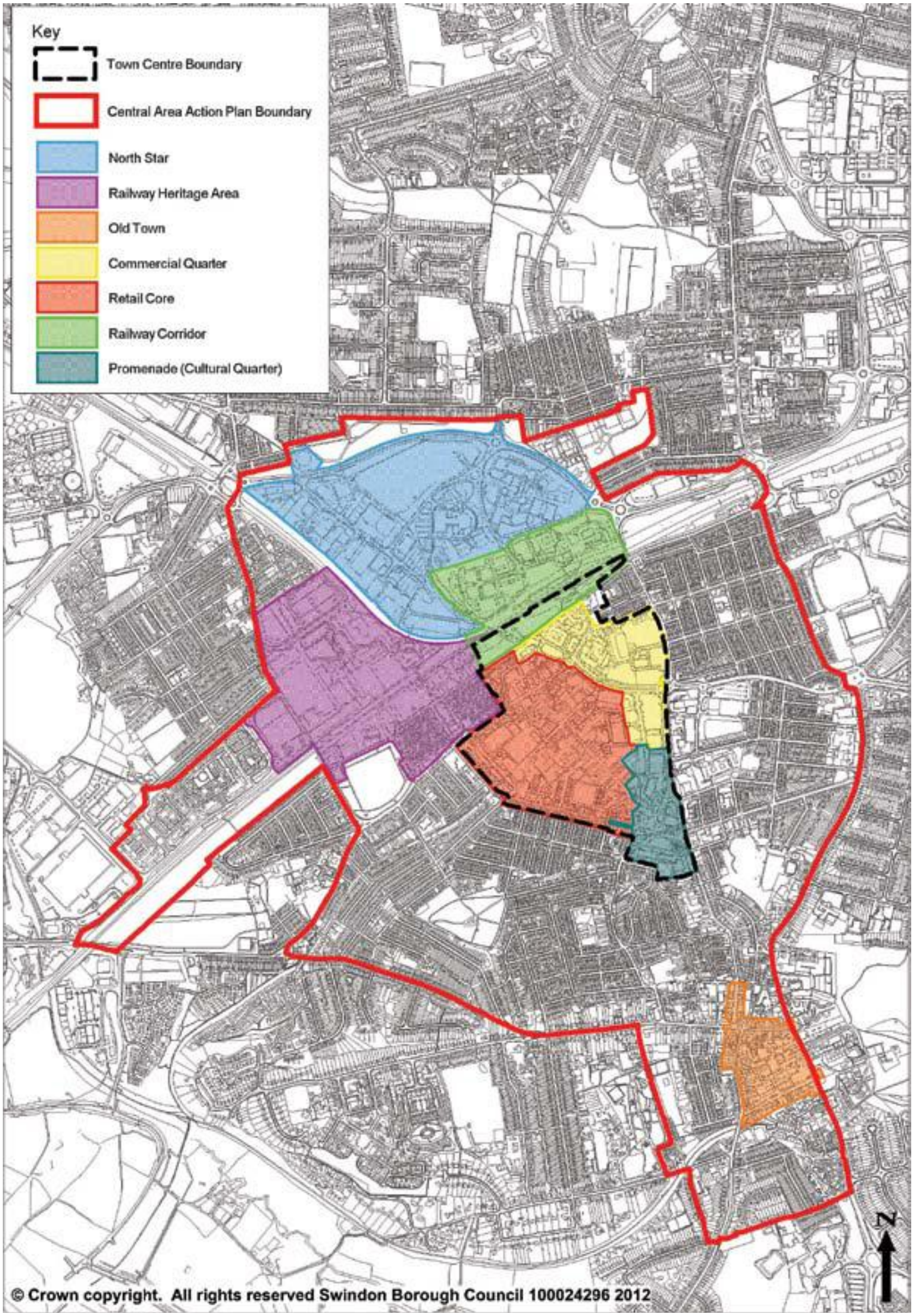
f. To secure Central Swindon as the focal point for Swindon's network of specialist leisure facilities:
- the Oasis Leisure Centre will be enabled to be redeveloped and expanded to reinforce its role as Swindon's flagship regional leisure destination; and
- the historic role of the Health Hydro will be enabled to be enhanced for water sports and as a spa facility.

g. Education provision will be made for:
- a new university and/or higher education facilities; and
- 2 new primary schools (or 3 forms-of-entry) if required.

h. Carfax Street Health Centre will be enabled to be relocated to increase the capacity and improve the quality and accessibility of health facilities within Central Swindon.

i. The route of the Wilts & Berks Canal, as set out on the Proposals Map, will be safeguarded to enable the re-instatement of it as a navigable water body, subject to detailed route assessments

j. The regeneration and development of Swindon's Central Area must integrate positively with, and contribute towards improvement of and mitigate their impact upon existing adjacent communities.


Key
Town Centre Boundary
Central Area Action Plan Boundary
North Star
Railway Heritage Area
Old Town
Commercial Quarter
Retail Core
Railway Corridor
Promenade (Cultural Quarter)
N
© Crown copyright. All rights reserved Swindon Borough Council 100024296 2012

APPENDIX 5

HOLIDAY COTTAGE LETTING WEBSITES & HOLIDAY COTTAGE LETTING AGENCY WEBSITES REVIEWED

Holiday Cottage Letting Websites

Holiday Lettings (Tripadvisor)
Home Away/ Owners Direct
The Cottage Guide
Stilwells Cottages Direct
Web Cottages
Sawdays Special Places to Stay
Group Accommodation

Holiday Cottage Letting Agencies

Cottages 4 You
English Country Cottages
Hideaways
Sykes Cottages
Unique Home Stays
Mulberry Cottages
National Trust Cottages
The Landmark Trust

APPENDIX 6

STAKEHOLDERS CONSULTED[1]

ORGANISATION	NAME
RESPONSES RECEIVED	
Bowood House	Judith Speller
Cherish Chippenham	Melody Thompson
Corsham Town Council	Sharon Thomas David Martin
Devizes Area Tourism Partnership	David Dawson
SWLEP	Paul Johnson Isobel Brown Claire Alexander
Marlborough Town Council	Shelley Parker
National Trust	Jo Atkins Kerry Dawson
Royal Wootton Bassett & Cricklade Area Board	Alison Bucknell
Salisbury BID	Amanda Newberry
Salisbury City Centre Management	Ian Newman Graham Gould
Swindon Borough Council	Paddy Bradley Phil Smith Andy Brown
Swindon Influence	Nicky Alberry
VisitWiltshire	David Andrews Fiona Errington Andrew Gostelow Theresa hopwood Peter Wragg
Warminster Development Trust	Michael Mounde
Wiltshire County Council	Tim Martienssen
	Adam Madge
	Charlie Bruce-White
	James Proyer
	Alan Creedy
	Tim Slator
	Caroline Lightfoot
Wiltshire Wildlife Trust	Stephen Maughan
CONTACTED – NO RESPONSE	
Bradford on Avon	
Cotswold AONB	
Cranborne Chase AONB	
English Heritage	
Kennet & Avon Canal Trust	
Longleat	
North Wessex Downs AONB	
Salisbury Cathedral	
Salisbury City Council	
Swindon Retail & Visitor Committee	
Trowbridge Town Council	

[1] Emails were sent directly to nominated contacts. VisitWiltshire asked for industry input via their newsletter and social media sites.

APPENDIX 7

HOTEL PERFORMANCE & MARKETS BY STANDARD/TYPE AND LOCATION

Swindon

Average annual room occupancies, achieved room rates[1] and revpar[2] figures for Swindon hotels from 2007 to 2013 are summarised in the table below.

SWINDON HOTEL PERFORMANCE 2007-2013

Year	Average Annual Room Occupancy %		Average Annual Achieved Room Rate £		Average Annual Revpar £	
	Swindon	UK Provinces	Swindon	UK Provinces	Swindon	UK Provinces
2007	73.3	71.1	58.99	63.17	43.24	44.92
2008	70.2	68.6	62.03	64.16	43.53	44.02
2009	59.2	65.8	56.02	59.73	33.15	39.32
2010	64.0	69.5	52.16	58.88	33.36	40.90
2011	66.3	70.9	53.00	58.64	35.15	41.56
2012	65.1	69.8	53.11	59.22	34.60	41.32
2013	68.2	72.6	53.84	59.94	36.73	43.53

Source: STR Global

In line with the national trend hotel performance in Swindon dropped back sharply in 2009 following the Credit Crunch at the end of 2008 and as a result of the increase in supply, with the opening of the Jury's Inn. A similar situation was seen in many other UK towns and cities, with new hotels that had been planned on the back of strengthening hotel demand opening at a time when the market suddenly and dramatically dropped back. Hotel performance in Swindon remained largely flat between 2010 and 2012, with some recovery in occupancy but a further drop in achieved room rates, resulting in broadly static revpar performance that has remained well below the 2008 revpar figure for the town. 2013 saw stronger growth in occupancy and a slight improvement in

[1] The amount of rooms revenue (excluding food and beverage income) that hotels achieve **per occupied room** net of VAT, breakfast (if included) and discounts and commission charges.
[2] The amount of rooms revenue (excluding food and beverage income) that hotels achieve **per available room** net of VAT, breakfast (if included) and discounts and commission charges.

achieved room rate and revpar performance but all performance indicators remained some way below 2007 and 2008 levels. Occupancies were still not back to 70% and achieved room rates remained under £54, well below the level that would support new 3 or 4 star hotel development in the town.

Swindon's leading 4 star hotels are likely to be achieving higher average room rates. The room rates that they are offering through online travel agents are certainly high on Tuesday and Wednesday nights. Their weekend rates are low however, suggesting that in overall terms they are likely to be trading at average room rates that are well below the national averages for provincial UK hotels.

We do not have specific performance data for Swindon's budget hotels but know from the data that we have obtained from one of the budget brands that is represented in the town that at least some of Swindon's budget hotels are trading at very high levels of occupancy and consistently filling and turning away significant business on all four midweek nights and Fridays and Saturdays.

Average daily room occupancies, achieved room rates and revpar figures for Swindon hotels for 2011, 2012 and 2013 are summarised in the table below.

SWINDON MIDWEEK & WEEKEND HOTEL PERFORMANCE

Day	Average Daily Room Occupancy %			Average Daily Achieved Room Rate £			Average Daily Revpar £		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
Mon	74.6	70.6	72.6	57.97	58.03	58.52	43.27	40.98	42.51
Tues	86.1	83.5	87.0	60.68	60.02	60.89	52.27	50.12	52.95
Weds	83.5	81.9	85.8	60.49	60.07	60.69	50.49	49.19	52.08
Thurs	63.9	63.0	65.4	55.61	55.29	55.67	35.51	34.83	36.39
Fri	50.6	52.0	55.2	39.70	41.41	42.02	20.11	21.53	23.20
Sat	67.2	69.8	72.7	41.87	42.20	43.52	28.14	29.47	31.64
Sun	38.3	35.7	38.5	42.82	45.79	46.88	16.41	16.34	18.04

Source: STR Global

Swindon hotel occupancies peak sharply on Tuesday and Wednesday nights, when they are typically above 85% and hotels frequently fill and turn business away. Achieved room rates are also stronger on these days, but still only just above £60. Monday and particularly Thursday nights are more shoulder nights.

Average monthly room occupancies, achieved room rates and revpar figures for Swindon hotels for 2011, 2012 and 2013 are summarised in the table below:

SWINDON HOTEL PERFORMANCE - SEASONALITY

Day	Average Daily Room Occupancy %			Average Daily Achieved Room Rate £			Average Daily Revpar £		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
Jan	51.2	52.6	52.0	55.40	56.50	54.65	28.34	29.70	28.44
Feb	57.5	59.0	59.1	55.18	55.93	55.14	31.71	32.98	32.58
Mar	66.7	61.3	62.9	56.00	54.06	53.99	37.36	33.15	33.97
April	61.2	60.0	65.5	49.36	51.24	53.49	30.22	30.74	35.01
May	68.5	67.8	69.9	51.62	53.15	51.89	35.34	36.03	36.28
June	76.1	71.1	73.6	52.36	51.17	51.95	39.85	36.39	38.24
July	84.4	78.8	82.2	55.42	57.57	58.15	46.80	45.34	47.82
August	73.5	68.3	75.3	49.19	48.22	49.26	36.14	32.95	37.11
Sept	73.1	72.3	74.4	53.16	52.38	54.33	38.86	37.85	40.43
Oct	66.1	69.3	74.2	53.26	53.74	56.03	35.20	37.25	41.58
Nov	64.9	65.0	67.1	54.72	53.81	55.30	35.49	34.99	37.08
Dec	52.3	56.0	61.7	50.26	49.56	51.77	26.29	27.75	31.94
Total	**66.3**	**65.1**	**68.2**	**53.00**	**53.11**	**53.84**	**35.15**	**34.60**	**36.73**

Source: STR Global

The Swindon hotel market is highly seasonal. Demand peaks between June and October, when hotel occupancies were consistently around 75% in 2013. July is the strongest month by all performance indicators, with the market buoyed by strong demand in the run up to and during the weekend of the International Air Tattoo at RAF Fairford. Occupancies are high in August but achieved room rates drop due to lower levels of corporate demand being replaced with lower-rated group tour and leisure business. Occupancies have generally been under 60% for the last three years between December and February. Achieved room rates are stronger in these months due to the predominance of corporate business and lack of leisure trade during the winter, but the low occupancies result in low revpar figures.

In line with the national trend, the improvement in hotel performance in 2013 came primarily in the last three months of the year. April was also a stronger month for Swindon hotels.

Corporate demand related to Swindon companies is the core midweek market for the town's hotels. This is a highly price competitive market, with hotels vying for business and companies able to command low room rates from the town's hotels because of the level of hotel supply in the area. Corporate demand has declined during the recession as companies have cut back on business travel budgets, corporate lengths of stay have reduced and companies have driven down the price that they are prepared to pay for hotel accommodation. There were some signs of recovery and renewed growth in corporate demand towards the end of 2013 however.

Residential conferences are a minor midweek market for some full service 3 and 4 star hotels. This market has been in decline nationally for a number of years as companies have cut back on meeting and training budgets, developed their own in-house meeting and training facilities and made greater use of teleconferencing. The recession has further exacerbated the downturn in this market. Recovery looks set to be slow and unlikely to return to pre-recession levels.

Swindon budget hotels also cater for contractors working on construction and development projects during the week. This market has also reduced during the recession as a result of the downturn in construction activity but has begun to increase again in 2013 as major projects have started on site.

Weekend occupancies and achieved room rates are low in Swindon. Saturday is the strongest weekend night, with hotel occupancies generally hitting around 70%. Friday occupancies are lower at an average of just over 55% in 2013. Sunday occupancies are very low- an average of 38.5% in 2013. Achieved room rates were £42 on Friday and £43.50 on Saturday nights in 2013. They were slightly higher on Sunday nights (almost £47) due to corporate arrivals.

The core weekend market for most Swindon hotels is UK and overseas group tours using the town's hotels as a base for visiting Bath, the Cotswolds, Stonehenge, Longleat and Oxford. This is generally low-rated business that hotels are taking in the absence of demand from other higher-paying leisure markets.

Some of the town's hotels attract weekend leisure break business as a result of their brand strength in this market, company leisure break marketing programmes and offers, and leisure facilities. Other hotels attract very little weekend break business. Leisure break business for Swindon hotels is primarily low-rated and offer-driven.

The International Air Tattoo at RAF Fairford in July is the only event that generates significant demand for hotel accommodation in Swindon.

Salisbury City

Our estimates of average annual room occupancies, achieved room rates and revpar figures for Salisbury hotels for 2012 and 2013 are set out in the table below, based on the data provided to us by the city's hotel managers.

SALISBURY HOTEL PERFORMANCE 2012-2013

Standard of Hotel/Location	Average Annual Room Occupancy %		Average Annual Achieved Room Rate £		Average Annual Revpar £	
	2012	2013	2012	2013	2012	2013
National						
All standards (4 star/ 3 star/ Budget)[1]	69.8	72.6	59.22	59.94	41.32	43.53
UK Provincial 3/4 Star Chain Hotels[2]	70.2	71.9	69.72	70.71	49.05	50.81
Salisbury						
All standards (4 star/3 star/Budget)	72.9	76.3	59.43	59.83	43.34	45.62
4 Star	73.7	76.7	69.44	70.58	51.18	54.10
3 Star	65.2	69.5	57.44	56.68	37.48	39.40

Source: Hotel Solutions – Survey of Wiltshire Hotel Managers – November 2012-February 2014
Notes:
1. Source: STR Global
2. Source: TRI Hotstats UK Chain Hotels Market Review

4 star hotel occupancies are strong in Salisbury. 4 star achieved room rates are in line with the national averages for provincial 3 and 4 star chain hotels.

The performance of 3 star hotels in Salisbury is relatively weak, with occupancies, achieved room rates and revpar figures some way below national averages. This is primarily due to the lack of sufficient corporate demand in Salisbury to fill all of the city's hotels during the week and the relatively low-rated nature of the city's corporate hotel market, with MoD-related business on lower government rates dominating. While the city's 3 star hotels achieve strong occupancies during the summer months when corporate demand is boosted by leisure trade, their winter occupancies are much lower. 3 star hotel performance varies substantially in the city, depending on the quality of hotels and the markets that they are targeting. One hotel achieves high occupancies through targeting group tour business.

Budget hotel occupancies are very high in Salisbury.

Occupancies and achieved room rates have dropped significantly for Salisbury's 3 and 4 star hotels since 2008 as a result of the Credit Crunch and ensuing recession. Occupancies have reduced both during the week and at weekends and the peak season has shortened to June to September from March to September.

Occupancies dipped for some Salisbury hotels in the summer of 2012 as a result of a downturn in demand during the London 2012 Olympics.

Occupancies and achieved room rates strengthened in the second half of 2013 for most of the city's hotels, signalling the beginnings of what is hoped will be a sustained period of recovery and renewed growth in the city's hotel market. Two 3 star hotels saw a fall in achieved room rates in 2013 however, as they dropped their room rates to drive more occupancy.

Budget hotel occupancies have remained high in Salisbury throughout the recession and achieved room rates have steadily improved.

There is evidence of growing demand for serviced apartments in Salisbury, particularly in terms of long stay, project-related MoD and corporate business. UK leisure break customers, overseas tourists and people visiting friends and relatives are also gradually beginning to understand and discover this type of accommodation. Demand from these markets can be useful to fill gaps between long stay corporate bookings.

The Salisbury hotel market is largely seasonal and leisure driven, particularly at the 3 star level. Demand peaks between May and September, when hotels achieve strong occupancies and high room rates. Most of the city's hotels consistently fill and turn business away during these months, both during the week and at weekends.

Some of the city's hotels achieve high occupancies on Saturday nights throughout the year and some also do well on most Friday nights. Friday and Saturday business is more seasonal for other hotels, dipping significantly between November and March. Sunday occupancies are generally low for most of the city's hotels, although a few are successfully using group tour business and special offer rates to boost their Sunday night business.

Most of Salisbury's hotels achieve high occupancies and frequently turn business away on Tuesday and Wednesday nights throughout the year. Monday and Thursday demand tends to be a lot lower, other than for branded budget hotel accommodation. Midweek demand is more seasonal for some 3 star hotels, which only hit high weekday occupancies between May and September. Midweek demand is generally lower for all hotels in January and February.

Local corporate demand is the core midweek market for most of Salisbury's hotels, generally accounting for around 65-70% of midweek occupancy, but a lower proportion during the summer months when leisure demand increases. Corporate demand in the city is not sufficient to fill all of the Salisbury's hotels, leaving most 3 star hotels trading at relatively low midweek occupancies during the winter months when leisure demand is weak. Corporate room rates are comparatively low as corporate demand in the city is dominated by MoD business on lower government rates. There are very few companies in Salisbury that generate significant demand for hotel accommodation in the city. A lot of MoD business is project related, involving extended stays over a period of weeks and in some cases months. Serviced apartments are growing in popularity for such stays. The corporate market for the city's hotels has reduced in the last 4 years as companies have downsized or closed their operations in Salisbury and as business travel budgets have reduced.

UK and overseas group tours are a reasonably significant midweek market during the summer months for Salisbury's graded 3 and 4 star hotels, accounting for 5-20% of their midweek trade and up to half of summer weekday business for one hotel. This tends to be lower-rated business but provides hotels with a guaranteed level of base demand as group tours tend to book a long way in advance. Overseas group tours are generally prepared to pay higher room rates. Group tours are typically staying in Salisbury for 2-3 nights before moving on to another part of the country. They tend to use Salisbury as a base for visiting Stonehenge, Salisbury Cathedral and the wider surrounding area. A number of hotels in Salisbury have specifically targeted this market in the last 4 years in order to compensate for the downturn in corporate and MoD business.

Most of Salisbury's graded 3 and 4 star hotels attract good demand for midweek breaks between April and September from the emptynester/retired market . They also attract business during these months from overseas tourists stopping off in Salisbury for a night or two.

Residential conferences are a very minor market for some of Salisbury's graded 3 and 4 star hotels. This is a market that has generally been reducing across the UK for the last 10 years as companies and public sector bodies have reduced their training and meeting budgets, developed their own in-house training and meeting facilities and made greater use of video and teleconferencing. The recession brought about a further sharp decline in this market. There were some signs of recovery in 2013 but this market looks unlikely to ever return to pre-recession levels.

Contractors working on construction, development, shop fitting, IT and other projects are a key source of midweek trade for branded budget and self-assessed 3 star hotels in Salisbury. This market increased in 2013.

Weekend break business is the core weekend market for most of Salisbury's hotels, typically accounting for 50-60% of weekend trade. Key draws for this market are Salisbury Cathedral and Stonehenge. Hotels achieve high weekend break rates during the summer months. Weekend break business tends to be more offer driven during the winter. Hotels now derive a large proportion of their weekend break trade through online travel agents. Most have been able to grow their weekend break business through these channels, albeit that they have to offer very competitive prices and are required to pay a commission on the bookings they receive. The last 4 years have seen a trend towards single night weekend break stays, primarily on Saturday nights. This has reduced Friday night occupancies for some hotels.

Weddings are the main weekend market for one hotel, usually blocking it out to the weekend break market, and a secondary source of weekend business for other hotels, accounting for up to 20-30% of weekend trade. Group tours are a significant weekend market for one 3 star hotel, which uses them to help boost Sunday occupancies, and a secondary weekend market for some 3 and 4 star hotels. Most of Salisbury's hotels attract some weekend demand from overseas tourists during the summer months. Masonic lodge weekends are a core shoulder season weekend market for one hotel. Soldiers and other people coming into Salisbury for a night out are the core weekend market for some of the city's self-assessed 3 star hotels. There is strong weekend demand for branded budget hotel accommodation from people visiting friends and relatives in and around Salisbury. One hotel caters for a German cycle touring group every year.

The Summer Solstice generates significant demand for hotel accommodation in Salisbury. Other events that generate small amounts of business for some hotels in Salisbury are as follows:

- Ageas Salisbury International Arts Festival;
- Salisbury Races;
- Salisbury Christmas Market;
- Salisbury Food & Drink Festival;
- Winter Solstice;
- Wilton Classic Supercar;
- Major motor racing events at Thruxton Circuit.

Most Salisbury hotel managers and owners are positive about the prospects for their hotel in 2014. With most of the city's hotels trading at, or near full capacity during the summer months, they are generally focusing on driving up room rates during the peak months and boosting off-peak business through increased and improved marketing, greater use of online travel agents and in some cases investment to improve and develop their offer. The city's hotel managers and owners are generally positive about the prospects for continued economic recovery in 2014 and most expect to see an increase in MoD business. A number feel that the new arrangements and increased length of time required for a visit to Stonehenge will help to encourage visitors to stay overnight in the area.

Wiltshire Luxury 4 and 5 Star Country House & Golf Hotels

Our estimates of average annual room occupancies, achieved room rates and revpar figures for Wiltshire's luxury 4 and 5 star country house and golf hotels for 2012 and 2013 are set out in the table below, based on the data provided to us by hotel managers.

WILTSHIRE 4/5 STAR COUNTRY HOUSE & GOLF HOTEL PERFORMANCE 2012-2013

Year	Average Annual Room Occupancy %	Average Annual Achieved Room Rate £	Average Annual Revpar £
2012	67.1	112.30	75.34
2013	74.8	123.94	92.69

Source: Hotel Solutions – Survey of Wiltshire Hotel Managers – November 2012-February 2014

4 star country house and golf hotels in Wiltshire saw strong growth in occupancy, achieved room rate and revpar performance in 2013, with the average annual room occupancy for such hotels in the county rising to almost 75% (compared to 67% in 2012), the average achieved room rate increasing to just under £124 (compared to £112 in 2012) and revpar growing to almost £93 (compared to £75 in 2012). This significant growth in performance was as a result of strong leisure demand for these types of hotel, investment in some hotels, and increased and improved marketing activity by a number of hotels.

Only one of Wiltshire's 5 star country house hotels agreed to take part in our research so we are unable to publish any results for this category of hotels. Our experience from studies of other counties in the South East (Hampshire, Surrey and East Sussex) is that 5 star country house hotels generally achieve relatively low average annual room occupancies (typically of around 55-60%) but very high achieved room rates (often well in excess of £200). We see no reason to think that Wiltshire's 5 star country house hotels are not trading at similar levels of occupancy and achieved room rate.

Wiltshire's 4 and 5 star country house and golf hotels are trading at high levels of occupancy on Friday and Saturday nights throughout the year and frequently fill and turn business away on these nights, especially during the summer months. Such hotels have strong appeal for weekend breaks, for which they act very much as destination hotels because of the quality of their facilities and food and their spa and golf offering. The destination in which these hotels are located tends to be of secondary importance. These hotels attract strong weekend break demand from people living in London, the Home Counties, South East England and South Wales. They are able to achieve very high room rates at weekends and attract strong demand for their feature bedrooms and suites. Sunday night business tends to be driven more through special offers and added value packages. The county's country house and golf hotels also have strong appeal for weddings. This tends to be a minor weekend market for most hotels however as they concentrate more on the weekend break market that can deliver strong, high-rated business across two and even three nights, whereas weddings-related business tends to involve primarily single night stays.

Midweek occupancies are not generally as strong, particularly at the 5 star level. They are stronger during the summer months but can be very low during the winter. Midweek denials are much less common. Midweek breaks are the core weekday market for most of the counties country house and golf hotels, typically accounting for 60-70% of their midweek trade. They tend to attract midweek break business from the emptynester/ retired market and in some cases from pre-school families. Residential conferences and corporate activities and events are the other key midweek market for Wiltshire's 4 and 5 star country house and golf hotels, accounting for around 30-40% of midweek business for a number of hotels. Residential conferences tend to be relatively small director level meetings of around 10-15 people, typically staying for 1-2 nights. One hotel attracts larger residential conferences of 50-60 delegates. Local corporate business is a minor market for most of the county's country house and golf hotels, although is an important source of weekday trade for a few. Other minor midweek markets for some hotels are overseas tourists, shooting parties and small, bespoke special interest group tours.

In terms of market trends, the county's 4 and 5 star country house and golf hotels generally saw strong growth in weekend and midweek leisure break business in 2013, together with an increase in weddings business. Residential conference demand dropped sharply in 2009 and during the ensuing recession but started to increase slightly in 2013. Most country house and golf hotel managers expect to see further growth in both occupancies and achieved room rates in 2014.

Wiltshire 3 Star Hotels

Our estimates of average annual room occupancies, achieved room rates and revpar figures for Wiltshire's 3 star hotels (beyond Salisbury) for 2012 and 2013 are set out in the table below, based on the data provided to us by hotel managers.

WILTSHIRE 3 STAR HOTEL[1] PERFORMANCE 2012-2013

Year	Average Annual Room Occupancy %	Average Annual Achieved Room Rate £	Average Annual Revpar £
2012	67.3	n/a	n/a
2013	68.5	54.97	37.64

Source: Hotel Solutions – Survey of Wiltshire Hotel Managers – November 2012-February 2014

Notes:
1. Beyond Salisbury

3 star hotel performance varies significantly in Wiltshire by location and quality of hotel, with average annual room occupancies in 2013 ranging from 50% to 87% and achieved room rates ranging from £35 to £75. The highest occupancies (70-80% +)were reported by hotels in Amesbury, Bradford-on-Avon, Corsham, Malmesbury, and Marlborough. Occupancies were lower (65-70%) for 3 star hotels in Calne, Chippenham, Devizes and Melksham) and low (50-60%)for hotels in Royal Wootton Bassett. Achieved room rates tend to vary more by quality of hotel than location.

3 star hotel occupancies and achieved room rates have been fairly stable across the county between 2011 and 2013. Some hotels saw an improvement in performance in 2012 and 2013 as a result of improved marketing and in some cases investment under existing or new owners. A few 3 star hotels saw a drop in occupancy and achieved room rates in 2013 as a result of increased budget hotel provision (e.g. in Chippenham) or internal management issues.

Monday to Wednesday night occupancies are generally strong (80-100%) for 3 star hotels across Wiltshire. They dip for some hotels in August and January and February. Thursday night occupancies are generally lower, typically running at around 50-60%. 3 star hotels in Bradford-on-Avon, Calne, Devizes, Marlborough and Melksham regularly fill and turn business away on Tuesday and Wednesday nights. Midweek denials are otherwise infrequent in other parts of the county.

Friday and Saturday night occupancies vary by location. They are strong (75-90%+) throughout the year (other than in January and February) in Bradford-on- Avon, Corsham, Malmesbury and Marlborough. Saturday occupancies are also high in Melksham. Friday and Saturday occupancies are lower (50-70%) and more seasonal for 3 star hotels in other parts of Wiltshire. Saturday occupancies tend to be stronger than Friday occupancies. Sunday night occupancies are generally very low (25-50%) for all of the county's 3 star hotels. A few hotels have had some success in driving Sunday night business through special offer promotions, albeit at greatly reduced room rates. 3 star hotels in Bradford-on-Avon, Corsham, Marlborough and Melksham frequently deny business on Saturday nights between April and September. This is primarily in terms of weekend break trade that hotels cannot take as they are already full with wedding parties. Weekend denials are less common in other parts of the county and rare in Amesbury and Chippenham.

The 3 star hotel market across Wiltshire is largely seasonal. Occupancies peak between April and September. They are lower between November and March. Achieved room rates are also lower during these months, with hotels driving leisure business more on price.

Corporate demand related to local companies is the main midweek market for most of Wiltshire's 3 star hotels, typically accounting for 75-95% of their weekday trade. Hotels generally serve demand from companies in their immediate vicinity. Hotels in Royal Wootton Bassett and Cricklade trade largely in the Swindon corporate market. Some Swindon business visitors opt to stay in Marlborough. Hotels in Bradford-on-Avon and Melksham also trade in the Trowbridge and Chippenham corporate markets to a certain degree.

Most of the county's 3 star hotels also attract some midweek break business during the summer months. This is a significant source of midweek business for a small minority of hotels that specifically target the emptynester/ retired short break market.

Group tours are a significant midweek market for one hotel. This is otherwise a very minor midweek market for the county's 3 star hotels. Most are too small to cater for group tours alongside their core corporate business, which delivers much higher room rates.

Residential conferences are a very minor market for the county's 3 star hotels. This is a market that has all but disappeared during the recession. While there were some signs of recovery in 2013 it is unlikely that this market will grow very much at the 3 star level.

Contractors working on construction and development projects are the main midweek market for one lower quality 3 star hotel and a minor market for two others.

Other minor midweek markets for Wiltshire 3 star hotels are overseas tourists during the summer months; shooting parties between September and January; cycling and walking groups; and parents visiting students at the University of Bath, Marlborough College or the private schools in the county.
Wedding parties are the main weekend market for a number of the county's 3 star hotels, in terms of the weddings that they hold themselves and weddings held at the county's 4 and 5 star country house and golf hotels, wedding barns and other wedding venues and weddings held in marquees in the grounds of large country homes in some parts of the county. Weddings trade frequently blocks 3 star hotels out to weekend break business as wedding parties generally book well in advance.

Most of the county's 3 star hotels attract some weekend break business. This is a key weekend market for some hotels but a lesser market for those hotels that concentrate on the weddings market. Weekend break business is limited for 3 star hotels in Calne and Chippenham. Key draws for weekend break stays are Bath, the Cotswolds, Stonehenge, Salisbury, Longleat, Lacock, Castle Coombe, Marlborough and crop circles. Some hotels also attract cyclists using the Kennet & Avon Canal for a cycling break. Hotels with golf and spa facilities attract weekend demand for golf and spa breaks. Some of the county's 3 star hotels primarily drive weekend break business on price, through the online travel agents and daily deals sites, such as Groupon and Travelzoo. Others achieve high prices for weekend breaks during the summer but drive winter business through special offers and added value packages. Key weekend break markets are emptynesters and career couples.

Group tours are a strong weekend market for one of Wiltshire's 3 star hotels and a minor weekend market for some other 3 star hotels. A number of hotels do not take weekend group tours however, either because they are too low-rated or because they would block them out for weddings business. Those hotels that cater for this market attract a mix of UK and overseas group tours. The room rates that UK group tours are prepared to pay are generally very low. Overseas groups will pay more. Some of the county's 3 star hotels expressed interest in growing this market, particularly in terms of attracting higher-rated private, special interest and overseas groups.

Other weekend markets for Wiltshire 3 star hotels are:

- Overseas tourists - a strong market for hotels in the vicinity of Stonehenge;
- Walking and cycling groups;
- Parents of students studying in Bath, at Marlborough College and at the private schools in the county;
- National Trust groups;
- People visiting friends and relatives;
- Transient holiday markers stopping off en-route to and from the West Country;
- Event visitors.

Major events that generate demand for 3 star hotels in a number of parts of Wiltshire are the Badminton Horse Trials and Bath Christmas Market. There are relatively few events in Wiltshire that generate demand for hotel accommodation. Those that do tend to generate business only for hotels in their immediate vicinity.

In terms of key trends in Wiltshire's 3 star hotel market:

- Corporate demand dropped sharply in 2009 as a result of the Credit Crunch and has remained sluggish during the ensuing recession. There were some signs of recovery and renewed growth in 2013 and hotel managers are generally optimistic that this trend will continue in 2014.

- Residential conference business has dwindled substantially and does not look likely to recover much for the foreseeable future.

- Contractor demand increased in 2013 for those 3 star hotels that trade in this market.

- In terms of weekend break business there has been a trend towards single night stays on Saturday nights, with a consequent weakening of demand for Friday nights. A number of 3 star hotels have been successful in driving increased weekend break business during the winter months through discounted rates and special offers that they promote through the online travel agents and daily deals sites.

- The weddings market has generally increased but has become more price sensitive and competitive, with an increase in the supply of wedding venues in the county. The growth in this market has squeezed out weekend break business for some hotels.

- A few hotels have successfully targeted the group tour in 2012 and 2013. One hotel reported a trend towards larger coaches.

- The demand generated in Royal Wootton Bassett from military funerals and their TV coverage has ceased since repatriation of soldiers killed in action has moved to Brize Norton.

The county's 3 star hotel managers and owners are generally optimistic about the prospects for their hotels in 2014. Most expect to see an increase in occupancies and achieved room rates on the back of strengthening corporate demand and growth in weekend weddings and leisure break business. Some hotels will remain focused on driving occupancy through discounted room rates and special offers at off peak times and may see a drop in achieved room rates as a result, but improved revpar performance. Others believe that they will be better able to yield their room rates as a result of the strengthening demand. There is some uncertainly in Amesbury, with MoD projects coming to an end, and less optimism in Chippenham.

Wiltshire Budget Hotels

Our estimates of average annual room occupancies, achieved room rates and revpar figures for Wiltshire's branded budget hotels (including Salisbury) for 2012 and 2013 are set out in the table below, based on the data provided to us by hotel managers.

WILTSHIRE BUDGET HOTEL PERFORMANCE 2012-2013

Year	Average Annual Room Occupancy %	Average Annual Achieved Room Rate £	Average Annual Revpar £
2012	75.0	n/a	n/a
2013	78.0	43.32	33.80

Source: Hotel Solutions – Survey of Wiltshire Hotel Managers – November 2012-February 2014

The performance of branded budget hotels in Wiltshire varies significantly by location and brand. Budget hotel occupancies are strong and increased in 2013 in Amesbury, Chippenham and Salisbury. Budget hotels in these locations achieve high midweek and weekend occupancies and frequently deny significant levels of business on Monday to Wednesday nights and Friday and Saturday nights during the summer months. Weekend demand is strong for budget hotel accommodation in Devizes but lower during the week. Weekend denials are common here but rare midweek. We have no information on budget hotel performance in Warminster. Premier Inns generally achieve higher room rates that Travelodges.

Midweek markets for the county's budget hotels are primarily a mix of business visitors and contractors, with hotels attracting some midweek leisure stays during the summer months. Contractor demand increased in most parts of the county in 2013.

Weekend markets are a mix of wedding parties, people visiting friends and relatives, leisure break stays, holiday makers stopping off en-route to/from the West Country and overseas tourists. Budget hotels have strong appeal to the family market. Leisure demand has grown steadily for the county's budget hotels over the last 3-4 years as a result of the staycation trend and the national marketing campaigns and special offer strategies of Premier Inn and Travelodge.

The prospects for the county's budget hotels look good in 2014, with occupancies expected to remain high and scope for growth in achieved room rates and revpar.

Wiltshire Small Ungraded Hotels

Average annual room occupancies for Wiltshire's small ungraded hotels vary significantly, ranging from 40% to 75% in 2013. Achieved room rates are generally low, typically around £40-50 or lower.

Small ungraded hotels in the county were generally trading well during the week in 2013, typically achieving midweek occupancies of at least 80%, catering for business visitors and contractors and some leisure break trade during the summer in some cases. One hotel also reported attracting overseas tourists during the week and a Danish tour group series. Demand from business visitors reduced during the recession but started to increase in 2013. Last year also saw an upturn in contractor demand.

Weekend occupancies are lower and more seasonal. They peak between May and September, when hotels are catering primarily for wedding parties and people visiting friends and relatives. Small ungraded hotels tend not to attract weekend break business. Either because they have less appeal for this market or because they are fully booked with wedding parties. Weekend occupancies and room rates are low between October and April. Saturday night occupancies are the strongest and some small ungraded hotels occasionally deny business on this night. Friday occupancies are low and Sunday occupancies very low.

The prospects for small ungraded hotels in 2014 vary by location. Hotels in Trowbridge have seen a sharp fall in occupancies since the opening of the new Premier Inn in the town centre in December 2013. They are very concerned about their ability to compete with this hotel going forward. Some small ungraded hotels in other parts of the county expect to see an improvement in occupancies and achieved room rates following refurbishment.

APPENDIX 8

**SALISBURY HOTEL MARKET GROWTH PROJECTIONS
RESULTS, METHODOLODY & ASSUMPTIONS**

1. Projected Market Potential for New Hotel Development in Salisbury to 2025

In order to provide an indication of the number of new hotel bedrooms that might be needed in Salisbury as the city's hotel market grows we have prepared projections of possible future growth in hotel demand in the city at 5-yearly intervals from 2015 to 2025. These projections are based on the intelligence that we have gathered about the current demand for hotel accommodation in Salisbury and our assessment of the prospects for future growth in business and leisure demand for hotel accommodation in the city.

We have prepared projections for 4 star/boutique and 3 star/budget hotels. The projections have been prepared using our Hotel Futures model. The methodology used by the model and the assumptions that we have used to run it for Salisbury are described in detail in Sections 2 and 3 below.

The results of the projections in terms of the projected market potential for new hotel bedrooms for each standard of hotel are summarised in the table overleaf.

SALISBURY
PROJECTED MARKET POTENTIAL FOR NEW HOTEL BEDROOMS - 2015-2025

Standard of Hotel/Year	Projected New Rooms Required[1]		
	Low Growth	Medium Growth	High Growth
4 Star/Boutique			
2015	31	34	36
2020	48	57	67
2025	67	86	106
3 Star/Budget			
2015	79	84	88
2020	111	129	148
2025	147	183	222
TOTAL NEW HOTEL ROOMS			
2015	110	118	124
2020	159	186	215
2025	214	269	328

Notes:

1. Figures are cumulative

2. Methodology

Our projections take as their baseline our estimates of satisfied business, summer leisure and winter leisure roomnight demand in 2013 for the two categories of hotel. We have assumed that each of these three types of demand will grow at different rates and have thus analysed our baseline roomnight data on this basis, using the detailed occupancy and market mix information provided to us by the city's hotel managers. In order to provide a truer baseline of both satisfied and unsatisfied demand for hotel accommodation in the city we have added in estimates of lost roomnight demand from Salisbury when the city's hotels are trading at full capacity, based on the insight provided by hotel managers. Having calculated adjusted baseline roomnight figures we have applied assumed Low, Medium and High growth rates to produce estimates of roomnight demand for each category of hotel in 2015, 2020 and 2025. The assumed rates we have used and the rationale for their selection is set out in Section 3.

The growth projections do not include any quantification of supply-led growth that new hotels might generate because of their branding and marketing.

Having calculated the potential future roomnight figures for the two categories of hotel we have then worked out the number of hotel bedrooms of each standard that the future roomnight demand would support assuming that all hotels achieve an average annual room occupancy of 70%. This is the level of occupancy that would support new hotel development and allow existing hotels to continue to trade well. Comparing these figures to the baseline supply in 2013 we have then calculated the number of additional bedrooms that might be needed to meet market growth for each standard of hotel.

Making any sort of market forecasts is an uncertain process: all forecasts are based on judgement and assumptions, and are susceptible to unforeseen changes. The projections we have prepared should thus be taken as indicative only and should be reviewed at regular intervals. They have been prepared to provide an illustration of the numbers of new hotel bedrooms that might be needed under different growth scenarios. They are not intended to be accurate projections of how the market will grow. Clearly the further ahead that one looks, the more difficult it is to project growth accurately. Projecting as far ahead as 12 years is very difficult. The projections to 2025 should thus be treated with caution.

3. Assumed Growth Rates

3.1. Business Demand

Employment forecasts provide an indicator of local business development and new companies coming into an area. They provide the most suitable indicator of potential growth in the volume of business demand for hotel accommodation therefore.

The latest available forecasts for employment growth in South Wiltshire[1] project employment growth at 10,430 new jobs between 2006 and 2026. Against a baseline employment figure of 61,020 jobs this would put the average annual growth in employment in South Wiltshire at 0.85%. The key growth sectors of military technology and biotechnology should be productive in terms of generating demand for hotel accommodation. A proportion of the projected employment growth will be in the distribution, retail and hotel sectors, which will not in themselves generate much business demand for hotel accommodation (although growth in the latter two sectors they will be a key driver of growth in leisure demand).

Taking account of these factors we have assumed the following average annual growth rates for business demand for 4 star/boutique hotel accommodation in Salisbury between 2013 and 2025.

SALISBURY HOTEL MARKET GROWTH PROJECTIONS
ASSUMED GROWTH RATES FOR BUSINESS DEMAND
4 STAR/BOUTIQUE HOTELS

Growth Scenario	Assumed Average Annual Growth Rate 2013-2025 %
Low	0.5
Medium	0.75
High	1

[1] Cambridge Econometrics forecasts quoted in 'Future Employment Needs in South Wiltshire- Employment and Land Forecasts', January 2011, Wiltshire Council

Budget and 3 star hotels should also see growth in demand from the contractors market as construction, development and infrastructure projects are progressed in and around Salisbury. We have thus assumed slightly higher growth rates in business demand for this category of hotels.

SALISBURY HOTEL MARKET GROWTH PROJECTIONS
ASSUMED GROWTH RATES FOR BUSINESS DEMAND
3 STAR/ BUDGET HOTELS

Growth Scenario	Assumed Average Annual Growth Rate 2013-2025 %
Low	1
Medium	1.5
High	2

3.2. Summer Leisure Demand

Research undertaken by Deloitte and Oxford Economics for VisitBritain in 2013[1] projects a real annual growth rate in domestic tourist spending on overnight stays of 3.8% from 2013 and a real growth rate of 6.1% per year for spending in the UK by overseas tourists. We see no reason to think that these growth rates should not apply to summer leisure demand for hotel accommodation in Salisbury.

Population growth provides an indicator of potential growth in weddings and functions-related demand for hotel accommodation and demand from the visiting friends and relatives market. The latest population projections for Wiltshire[2] show an average annual growth rate for the South Wiltshire population of 0.47% between 2013 and 2025.

Taking account of these indicators, we have assumed the following average annual growth rates for summer leisure demand for hotel accommodation in Salisbury between 2013 and 2025.

SALISBURY HOTEL MARKET GROWTH PROJECTIONS
ASSUMED GROWTH RATES FOR SUMMER LEISURE DEMAND

Growth Scenario	Assumed Average Annual Growth Rate 2012-2030 %
Low	3
Medium	4
High	5

[1] Tourism Jobs and Growth: The economic Contribution of the Tourism Economy to the UK, Deloitte/Oxford Economics, November 2013.
[2] Wiltshire Population 2011: Wiltshire and Community Area Population Estimates and projections 2011 to 2026: Trend Based, Wiltshire Council, July 2011

3.3. Winter Leisure Demand

Leisure demand for hotel accommodation in Salisbury is likely to grow at a much slower rate than during the summer. In the absence of any indicators that we can use to assess how much winter leisure demand might grow by, we have assumed the following average annual growth rates for the winter leisure market for 4 star/boutique hotel accommodation in Salisbury between 2013 and 2025:

SALISBURY HOTEL MARKET GROWTH PROJECTIONS
ASSUMED GROWTH RATES FOR WINTER LEISURE DEMAND
4 STAR/BOUTIQUE HOTELS

Growth Scenario	Assumed Average Annual Growth Rate 2012-2030 %
Low	0.5
Medium	1
High	1.5

The anticipated population growth in South Wiltshire and increased military presence is likely to result in increased demand for budget hotel accommodation in Salisbury city centre from people coming into the city for a night out. We have therefore assumed slightly higher growth rates for winter leisure demand for 3 star/budget hotels:

SALISBURY HOTEL MARKET GROWTH PROJECTIONS
ASSUMED GROWTH RATES FOR WINTER LEISURE DEMAND
3 STAR/BUDGET HOTELS

Growth Scenario	Assumed Average Annual Growth Rate 2012-2030 %
Low	1
Medium	1.5
High	2

APPENDIX 9

GLOSSARY OF DEFINITIONS

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 Hotels

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.

Canal Boat Holiday Hire

Narrowboats for hire for canal holidays and short breaks, usually for self navigation and catering. Can also be skippered.

Hotel Boats

Narrowboats that provide a fully catered and skippered canal holiday or short break cruise.