D2N2
VISITOR ACCOMMODATION STRATEGY

Technical Appendices

Prepared for:
D2N2 Visitor Economy Advisory Group

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APPENDIX 1

GLOSSARY OF DEFINITIONS – VISITOR ACCOMMODATION

Types of Hotel

Budget

Branded limited service hotels with clean and comfortable standardised en-suite bedrooms with TV and tea and coffee making facilities and paid for Wi-Fi but otherwise limited in-room provision or services such as guest toiletries or room service. Will locate in a wide range of locations from major cities to smaller towns, seaside resorts and airport locations. Size will vary significantly by location. Tend to be larger hotels (100-200 bedrooms) in major cities and smaller hotels (50-60 bedrooms) in provincial town locations.

Key budget hotel brands in the UK are Travelodge, Premier Inn, Ibis, Days Inn

Economy budget brands (with a more basic bedroom product) include Ibis Budget, Campanile and Metro Inns

Upper Tier Budget

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

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

3 Star

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

Brand examples include Holiday Inn, Ramada, Village Urban Resort, Jury's Inn, Park Inn

4 Star

A full service hotel but with a higher specification and larger bedrooms than 3 star hotels, usually offering bath and shower, telephone, internet connection, and a wider range of services including full room service and porterage, and 24 hour reception. A quality restaurant, bar, a range of meeting rooms and business services, and a health and fitness centre. These tend to be large hotels, over 150 rooms, and sometimes up to 250 rooms+. Major city centres are the preferred locations.

Brand examples include Marriott, Crowne Plaza, Hilton, Radisson Blu, Novotel, Doubletree by Hilton, Copthorne, Millennium, Pullman, Macdonald

5 Star

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

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

Boutique

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

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

Budget Boutique

Design-led limited service hotels

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

Townhouse Hotels

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

Brand examples include The Eton Collection, The Townhouse Collection.

Country House Hotels

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

Golf Hotels and Resorts

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

Luxury Family Hotels

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

Adult Only Hotels

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

Spa Hotels

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

Serviced Apartments

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

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

Aparthotels

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

Brand examples include Staybridge Suites, Adagio

Hotel Performance Terminology

Room Occupancy

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

Achieved Room Rate (ARR)

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

Revpar

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

Other Types of Accommodation

Inn

Bed and breakfast accommodation within a traditional inn or pub.

Boutique Inn

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

Restaurant with Rooms

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

Guest House

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

B&B

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

Boutique B&B

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

Farmhouse B&B

Bed and breakfast accommodation provided on a working farm.

Holiday Cottage

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

Boutique Self Catering

Luxury self-catering accommodation that features contemporary interior design

Super Cottages

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

Access Exceptional Self Catering Cottages

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

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

Holiday Lodges

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

Holiday Lodge Parks

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

Fishing Lodges

Holiday lodges around fishing lakes, usually for rental.

Golf Lodges

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

Eco Lodges/ Eco Lodge Parks

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

Treehouses

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

Holiday Parks

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

Touring Caravan & Camping Sites

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

Certificated Sites

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

Eco Camping/ Wild Camping

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

Camping Pods

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

Glamping

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

Youth Hostels

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

Luxury Hostels

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

Bunkhouses

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

Camping Barns

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

Farm Stay

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

APPENDIX 2

NPPG - TOURISM PLANNING GUIDANCE (From March 2014)

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

Ensuring the vitality of town centres

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

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

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

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

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

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

http://planningguidance.planningportal.gov.uk/blog/guidance/ensuring-the-vitality-of-town-centres/ensuring-the-vitality-of-town-centres-guidance/ - paragraph_007Revision date: 06 03 2014

See overleaf for VisitEngland guidance.

Tourism Sector Tourism Planning Guidance[1]

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

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

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

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

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

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

[1] Source VisitEngland corporate website

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

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

3. How should tourism be accommodated in rural areas?

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

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

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

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

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

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

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

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

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

6. What about applications for permanent staff accommodation?

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

APPENDIX 3

D2N2 VISITOR ACCOMMODATION SUPPLY REVIEW

1. The Scope of the Review

The review of the current visitor accommodation supply of the D2N2 area took as its starting point the accommodation stock databases of Visit Peak District & Derbyshire and Experience Nottinghamshire. As far as we have been able to, we have cross-checked these databases against a range of visitor accommodation websites to identify any accommodation businesses that are no longer trading and additional establishments that do not appear on the databases of the two DMOs. The following websites were interrogated for our review:

For Hotels, Guest Houses and B&Bs

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

For Self-Catering Accommodation (for Nottinghamshire)

- Homeaway
- Holiday Lettings
- Owners Direct
- The Cottage Guide
- Premier Cottages
- Sawdays (for boutique properties)
- Unique Home Stays (for boutique properties)
- Mr & Mrs Smith (for boutique properties)
- Group Accommodation (for large self-catering properties)
- Agency websites:
  - Cottages.com
  - Sykes Cottages
  - English Country Cottages

For Caravan & Camping Sites

- UK Campsite
- Pitchup
- Love Camping

For Glamping Sites

- Canopy & Stars
- Go Glamping
- Cool Camping

The budget for the Accommodation Strategy was not sufficient for us to be able to undertake a detailed review and cross-check of Visit Peak District & Derbyshire's self-catering accommodation stock database. This would be a very time consuming task. For the Derbyshire self-catering supply analysis, we have thus relied on the VisitEngland 2016 Census of Non-Serviced Accommodation Stock. We have however been able to undertake a detailed cross-check of self-catering provision in Nottinghamshire.

2. Total Visitor Accommodation Supply in the D2N2 Area

On the basis of our review of the current visitor accommodation supply across the D2N2 area we estimate that there are just over 2,000 visitor accommodation businesses in the area, with total of over 70,000 letting bedspaces.

Table 1
D2N2 VISITOR ACCOMMODATION SUPPLY
DECEMBER 2016

Type of Accommodation	Total Establishments	%	Total Bedspaces	%
Derbyshire				
Hotels	97	5.4	9027	21.3
Inns	98	5.5	1299	3.1
Guest Houses/ B&Bs	283	15.7	2143	5.1
Self-Catering	1094	60.8	8298	19.6
Caravan & Camping Sites	163	9.1	18264	43.1
Glamping Sites	22	1.2	236	0.5
Group & Youth Accommodation	42	2.3	3074	7.3
TOTAL DERBYSHIRE	**1799**	**100**	**42341**	**100**
Nottinghamshire				
Hotels	86	25.6	10722	37.9
Inns	45	13.4	650	2.3
Guest Houses/ B&Bs	89	26.5	769	2.7
Self-Catering	65	19.3	5713	20.2
Caravan & Camping Sites	34	10.1	6024	21.3
Glamping Sites	5	1.5	63	0.2
Group & Youth Accommodation	12	3.6	4339	15.4
TOTAL NOTTINGHAMSHIRE	**336**	**100**	**28280**	**100**
D2N2				
Hotels	183	8.6	19749	28.0
Inns	143	6.7	1949	2.8
Guest Houses/ B&Bs	372	17.4	2912	4.1
Self-Catering	1159	54.3	14011	19.8
Caravan & Camping Sites	197	9.2	24288	34.4
Glamping Sites	27	1.3	299	0.4
Group & Youth Accommodation	54	2.5	7413	10.5
TOTAL D2N2	**2135**	**100**	**70621**	**100**

Touring caravan and camping sites account for the most significant proportion of the D2N2 area's total bedspace capacity in visitor accommodation, followed by hotels and self-catering accommodation. The area also has a good stock of group and youth accommodation and good numbers of inns, B&Bs and guest houses. Glamping accounts for a very small proportion of the total accommodation supply.

Derbyshire has a greater accommodation supply that Nottinghamshire, particularly in terms of touring caravanning and camping provision, and self-catering accommodation. Nottinghamshire's self-catering accommodation supply is dominated by the Center Parcs holiday village. Its supply of holiday cottages is much lower than Derbyshire's. Both counties have similar supplies of holiday lodges and holiday lodge parks however.

Nottinghamshire has a higher bedspace capacity in hotel accommodation than Derbyshire, concentrated in and around Nottingham. It also has greater overall provision in terms of group and youth accommodation, although its supply is concentrated in campus accommodation at the University of Nottingham and Nottingham Trent University's campus at Brackenhurst. In terms of youth hostels, outdoor education centres, camping barns and bunkhouses, Derbyshire has a much more significant supply than Nottinghamshire, concentrated in the Peak District.

Derbyshire also has a more significant stock of inns, B&Bs/guest houses and glamping provision.

Further analysis of the D2N2 visitor accommodation offer shows the following information regarding sub-categories of accommodation:

- Nottingham and Derby each have a small supply of serviced apartments in terms of residential apartments that are let out by serviced apartment letting agencies, purpose-built serviced apartment complexes, and in Nottingham as aparthotel (Roomzzz Nottingham City).

- Derbyshire and Nottinghamshire both have a number of wedding venues with accommodation.

- The only restaurants with rooms that we have identified in the D2N2 area are Restaurant Sat Bains in Nottingham, White's of Ashbourne, and Harpur's of Melbourne.

- Nottinghamshire has a small boutique spa with bedrooms – Church Spa at East Markham. There are no spa hotels or health farms in the D2N2 area.

- A number of holiday parks and touring caravan and camping sites offer camping pods.

In addition to formal accommodation businesses, there are over 300 people in each county that offer rooms and in some cases whole houses through the airbnb site.

3. Visitor Accommodation Just Beyond D2N2

There are two significant hotels to the south of Sheffield that serve the Chesterfield and North East Derbyshire corporate hotel market – the Doublletree by Hilton Sheffield Park and the Mosborough Hall Hotel. To the south of the D2N2 area there are concentrations of hotels at the East Midlands Airport, Castle Donnington, Kegworth and Burton-upon-Trent, that also serve South Derbyshire.

Table2
HOTELS ON THE EDGE OF THE D2N2 AREA

Hotel	Location	Grading	Bedrooms
Sheffield South			
Doubletree by Hilton Sheffield Park	Batemoor	4 star	95
Best Western Plus Mosborough Hall	Mosborough	3 star	44
TOTAL			**139**
East Midlands Airport			
Radisson Blu East Midlands Airport	EM Airport	4 star	218
Hilton East Midlands Airport	Kegworth	4 star	152
Priest House On The River	Castle Donnington	4 star	42
Best Western Premier E M Airport	Kegworth	4 star	103
Jury's Inn East Midlands Airport	EM Airport	3 star	164
Kegworth Hotel East Midlands Airport	Kegworth	3 star	79
Donington Manor Hotel	Castle Donnington	3 star	33
Donnington Park Farmhouse	Castle Donnington	3 star	19
Holiday Inn Express East Midlands Airport	EM Airport	Budget	90
Premier Inn East Midlands Airport	EM Airport	Budget	80
Travelodge EM Airport	EM Airport	Budget	78
TOTAL			**1058**
Burton-upon-Trent			
Mercure Burton Upon Trent	Newton Solney	4 star	50
Three Queens Hotel	Burton-upon-Trent	3 star	62
Dovecliff Hall Hotel	Burton-upon-Trent	3 star	15
The Grail Court Hotel	Burton-upon-Trent	3 star	16
Holiday Inn Express Burton-on-Trent	Burton-upon-Trent	Budget	82
Premier Inn Burton-on-Trent Central	Burton-upon-Trent	Budget	64
Premier Inn Burton-on-Trent East	Burton-upon-Trent	Budget	32
Travelodge Burton Upon Trent Central	Burton-upon-Trent	Budget	68
TOTAL			**389**

While our review of the current accommodation offer of the D2N2 area has not included a detailed assessment of the supply of other types of visitor accommodation business in the areas immediately surrounding Derbyshire and Nottinghamshire, it is clear from the work that we have undertaken that there are a number of hotels, self-catering businesses, glamping sites, touring caravan and camping sites, holiday lodge parks, outdoor education centres and children's activity holiday centres in the Staffordshire, Cheshire and Yorkshire parts of the Peak District that compete for business with similar establishments in the Derbyshire Peak District. The Kingswood Group, for example, operates the Peak Venture residential educational activity centre at Penistone, with accommodation for up to 200 children. To the south of Derbyshire, Action Centre UK's Whitemoor Lakes activity centre at Alrewas provides accommodation for up to 300 young people.

4. Analysis by Location

The tables overleaf provide an analysis of the current D2N2 visitor accommodation supply by district/borough and county in terms of numbers of establishments and bedspace capacity for each category of accommodation. Key observations on accommodation supply by location are as follows:

- The Derbyshire Peak District accounts for the largest proportion of the D2N2 area's current visitor accommodation supply. It has a significant stock of self-catering holiday cottages and touring caravan and camping sites. It accounts for the highest percentage of inn and B&B accommodation, but a lower proportion of the D2N2 hotel stock. The Derbyshire Peak District also has a good supply of group and youth accommodation in terms of outdoor education centres, youth hostels, camping barns and bunkhouses, and a small but growing supply of glamping sites. There are two large holiday lodge parks on the edge of the National Park (Darwin Forest Country Park and Sandybrook Country Park) and a number of holiday parks, both within and immediately surrounding the National Park have holiday lodges. Cliffe Conference Centre at Calver provides residential accommodation for up to 96 people. Upper House at Hayfield is a wedding venue with accommodation.

- In other parts of Derbyshire, the accommodation supply is predominantly in hotels. Amber Valley has a good stock of self-catering accommodation and touring caravanning and camping provision, two high quality wedding venues with accommodation (Shottle Hall and Alfreton Hall) and two residential conference centres (Lea Development Centre and The Hayes Conference Centre). Derby Conference Centre is a further residential conference centre in the county. The National Forest (South Derbyshire) has a number of holiday lodge sites, touring caravan and camping sites, and some glamping provision.

- The D2N2 hotel supply is concentrated in Nottingham and its suburbs, and to a lesser extent Derby. The Nottingham and Derby hotel supplies comprise predominantly large branded hotels, with some, mainly smaller, independent hotels. Budget and 3 star hotels dominate in both cities. Nottingham city centre has three 4 star hotels and four small, independent boutique hotels. Derby has just one city centre 4 star hotel and an independent boutique hotel. Neither city currently has a luxury hotel.

- Beyond Nottingham and Derby there is a concentration of large branded 3 and 4 star hotels with conference facilities in the M1 corridor between junctions 25 and 26.

- The hotel supply in the Derbyshire Peak District comprises predominantly small and medium-sized independent 3 and 4 star hotels. The Palace Hotel in Buxton is the only large hotel. Until the opening of the Buxton and Matlock Premier Inns in 2016, the Ashbourne and Glossop Travelodges were the only branded hotels in the Derbyshire Peak District.

- Chesterfield has a stock of budget hotels, the 4 star Casa Hotel and the 3 star Ringwood Hall Hotel. Other towns (Worksop, Retford, Newark, Southwell, Bingham, Ripley and Alfreton) are typically served by one or two independent 3 star hotels and in some cases a Premier Inn or a Travelodge budget hotel. Mansfield stands out as a large town with very little hotel provision. Other fairly large towns with little or no hotel accommodation are Belper, Ilkeston and Swadlincote.

- The D2N2 area has only one large golf hotel – the Breadsall Priory Marriott Hotel & Country Club. Derbyshire has two other small golf hotels (Morley Hayes and Horsley Lodge). In Nottinghamshire, The Nottinghamshire Golf & Country Club at Cotgrave opened The Residence in 2016 as a small boutique hotel.

- In Nottinghamshire, Warner Leisure Hotels operates the Thoresby Hall Hotel & Spa as a 4 star adults only country house hotel.

- Non-serviced accommodation in Nottinghamshire is concentrated in Sherwood Forest. This is the location of the Center Parcs holiday village. There are also a number of holiday lodge parks and a good supply of touring caravanning and camping provision here, but very little in terms of holiday cottages and glamping. Newark & Sherwood and Bassetlaw account for the largest proportion of inn and B&B accommodation in Nottinghamshire. In other parts of the county accommodation provision is primarily in hotels. Rushcliffe has two large touring caravan and camping sites, and there is a Camping and Caravanning Club site at Teversal in Ashfield. Nottinghamshire also has a number of wedding venues with accommodation, including Hodsock Priory, Norwood Park, The Old Vicarage at Southwell, and East Bridgford Hill. In terms of group and youth accommodation, the University of Nottingham and Nottingham Trent University's Brackenhurst campus provide a significant stock of campus accommodation for conferences. The county has very little in terms of other forms of group and youth accommodation – just the Sherwood Forest YHA hostel, three small independent hostels in Nottingham and the Walesby Forest Outdoor Activity Centre, near Newark.

Table 3
D2N2 VISITOR ACCOMMODATION SUPPLY – DECEMBER 2016
ANALYSIS BY DISTRICT & COUNTY - ESTABLISHMENTS

District/County	Hotels		Inns		Guest Houses/B&Bs		Self-Catering[1]		Caravan & Camp Sites		Glamping Sites		Group & Youth Accom[4]		TOTAL	
	Estabs	%	Estabs	%	Estabs	%	Estabs	%	Estabs	%	Estabs	%	Estabs	%	Estabs	%
Derbyshire																
Amber Valley	9	4.9	9	6.3	18	4.8	82	7.1	19	9.7	1	3.7	3	5.6	141	6.6
Bolsover	6	3.3	4	2.8	5	1.3	5	0.4	2	1.0	1	3.7			23	1.1
Chesterfield	9	4.9	2	1.4	10	2.7	26	2.2	3	1.5	1	3.7	2	3.7	53	2.5
Derby	26	14.2	2	1.4	12	3.2	12[2]	1.0	1	0.5					53	2.5
Derbyshire Dales	24	13.1	34	23.8	132	35.5	621	53.6	79	40.1	12	44.4	18	33.3	920	43.1
Erewash	4	2.2			3	0.8	1	0.1	1	0.5					9	0.4
High Peak	11	6.0	34	23.8	81	21.7	279	24.1	42	21.3	5	18.5	18	33.3	470	22.0
North East Derbys	4	2.2	4	2.8	9	2.4	38	3.3	10	5.1			1	1.9	66	3.1
South Derbyshire	4	2.2	9	6.2	13	3.5	30	2.6	6	3.0	2	7.5			64	3.0
Total Derbys	**97**	**53.0**	**98**	**68.5**	**283**	**76.1**	**1094**	**94.4**	**163**	**82.7**	**22**	**81.5**	**42**	**77.8**	**1799**	**84.3**
Nottinghamshire																
Ashfield	4	2.2	3	2.1	2	0.5	5	0.4	1	0.5	1	3.7			16	0.7
Bassetlaw	8	4.4	17	11.9	13	3.5	11	0.9	14	7.1	1	3.7	2	3.7	66	3.1
Broxtowe	9	4.9	4	2.8	3	0.8									16	0.7
Gedling	3	1.6	1	0.7	2	0.5									6	0.3
Mansfield	6	3.3			4	1.4	2	0.2	1	0.5					12	0.6
Newark & Sherwood	11	6.0	20	14.0	46	12.4	24[3]	2.1	11	5.6	3	11.1	4	7.4	119	5.6
Nottingham	36	19.7			10	2.7	13[2]	1.1	1	0.5			4	7.4	64	3.0
Rushcliffe	9	4.9			9	2.4	10[2]	0.9	6	3.1			2	3.7	36	1.7
Total Notts	**86**	**47.0**	**45**	**31.5**	**89**	**23.9**	**65**	**5.6**	**34**	**17.3**	**5**	**18.5**	**12**	**22.2**	**335**	**15.7**
D2N2 TOTAL	**183**	**100**	**143**	**100**	**372**	**100**	**1159**	**100**	**197**	**100**	**27**	**100**	**54**	**100**	**2135**	**100**

Notes:
1. Source for Derbyshire self-catering supply: VisitEngland 2016 Census of Non-Serviced Accommodation Stock, supplemented by Hotel Solutions research
2. Including serviced apartments
3. Includes Center Parcs holiday village (900 holiday villas)
4. Includes campus accommodation, residential conference centres, wedding venues with accommodation, hostels, outdoor education centres, camping barns and bunkhouses

Table 4
D2N2 VISITOR ACCOMMODATION SUPPLY – DECEMBER 2016
ANALYSIS BY DISTRICT & COUNTY - BEDSPACES

District/County	Hotels		Inns		Guest Houses/B&Bs		Self-Catering[1]		Caravan & Camp Sites		Glamping Sites		Group & Youth Accom[5]		TOTAL	
	Beds	%	Beds	%	Beds	%	Beds	%	Beds[4]	%	Beds	%	Beds	%	Beds	%
Derbyshire																
Amber Valley	574	2.9	118	6.0	123	4.2	476	3.4	2111	8.7	6	2.0	483	6.5	3891	5.5
Bolsover	929	4.7	56	2.9	43	1.5	31	0.2	25	0.1	4	1.3			1088	1.5
Chesterfield	962	4.9	46	2.4	115	3.9	197	1.4	288	1.2	2	0.7			1610	2.3
Derby	3728	18.9	56	2.9	176	6.1	176[2]	1.3	45	0.2			196	2.7	4377	6.2
Derbyshire Dales	1071	5.4	428	22.0	840	28.9	4531	32.3	9906	40.8	146	48.8	922	12.4	17844	25.3
Erewash	383	1.9			18	0.6	5	0.1	15	0.1					421	0.6
High Peak	893	4.5	434	22.3	673	23.1	2157	15.4	4953	20.4	62	17.4	1343	18.1	10505	14.9
North East Derbys	185	0.9	41	2.1	56	1.9	212	1.5	225	0.9			130	1.8	849	1.2
South Derbyshire	302	1.6	120	6.1	99	3.4	513	3.6	696	2.8	26	8.7			1756	2.5
Total Derbys	**9027**	**45.7**	**1299**	**66.7**	**2143**	**73.6**	**8298**	**59.2**	**18264**	**75.2**	**236**	**78.9**	**3074**	**41.5**	**41489**	**60.0**
Nottinghamshire																
Ashfield	524	2.6	53	2.7	25	0.9	29	0.2	504	2.0	8	2.7	40	0.5	1183	1.7
Bassetlaw	798	4.0	233	12.0	122	4.2	125	0.9	2811	11.6	25	8.4			4114	5.8
Broxtowe	1220	6.2	90	4.6	45	1.6									1355	1.9
Gedling	230	1.2	8	0.4	10	0.3									248	0.4
Mansfield	170	0.8			61	2.1	44	0.3	111	0.4					386	0.5
Newark & Sherwood	942	4.8	266	13.6	322	11.1	4420[3]	31.6	1518	6.3	30	10.0	519	7.0	8017	11.3
Nottingham	6272	31.8			112	3.8	924[2]	6.6	15	0.1			3752	50.6	11075	15.7
Rushcliffe	566	2.9			72	2.4	171[2]	1.2	1065	4.4			28	0.4	1902	2.7
Total Notts	**10722**	**54.3**	**650**	**33.3**	**769**	**26.4**	**5713**	**40.8**	**6024**	**24.8**	**63**	**21.1**	**4339**	**58.5**	**28280**	**40.0**
D2N2 TOTAL	**19749**	**100**	**1949**	**100**	**2912**	**100**	**14011**	**100**	**24288**	**100**	**299**	**100**	**7413**	**100**	**70621**	**100**

Notes:

1. Source for Derbyshire self-catering supply: VisitEngland 2016 Census of Non-Serviced Accommodation Stock, supplemented by Hotel Solutions research
2. Including serviced apartments
3. Includes Center Parcs holiday village (900 holiday villas)
4. Calculated on the basis of an average of 3 bedspaces per pitch
5. Includes campus accommodation, residential conference centres, wedding venues with accommodation, hostels, outdoor education centres, camping barns and bunkhouses

5. Assessment of the Overall Quality of the D2N2 Visitor Accommodation Offer and Exemplar Accommodation Businesses

From the internet searches that we have completed as part of the accommodation stock review, our assessment of Tripadvisor reviews for accommodation businesses in the two counties, and our visits to accommodation businesses, we have however formed the following views on the quality of the D2N2 visitor accommodation offer, and identified a number of exemplar accommodation businesses.

5.1. Hotels

There are clearly issues with the quality of some of the hotels across the D2N2 area. While TripAdvisor reviews are predominantly positive, a significant number of hotels, including a number of 4 star hotels, are receiving frequent comments about their product being tired and dated. A number of the hotel managers that we spoke to recognised that their hotels are in need of investment and some (but not all) are in the process of progressing significant refurbishment and upgrading programmes.

The Derbyshire Peak District has a number of generally small high quality country house and boutique hotels.

Table 5

DERBYSHIRE PEAK DISTRICT – QUALITY COUNTRY HOUSE & BOUTIQUE HOTELS

Hotel	Location	Rooms	Comment
The Cavendish Hotel	Baslow	24	Luxury country house hotel, recently refurbished in a contemporary style
Fischer's Baslow Hall	Baslow	11	Small country house hotel
The Peacock at Rowsley	Rowsley	15	Small boutique hotel, listed in Sawday's Special Places to Stay
East Lodge	Rowsley	12	Small country house hotel
Losehill House Hotel & Spa	Hope Valley	23	4 star boutique hotel
The Maynard	Grindleford	10	Small boutique hotel
New Bath Hotel & Spa	Matlock Bath	54	Reopened in 2016 as a contemporary 4 star boutique hotel following a year-long refurbishment programme
Peak Edge Hotel	Ashover	26	Modern 4 star boutique hotel opened in 2011

Other boutique hotels in Derbyshire are the Cathedral Quarter Hotel in Derby and the recently opened Kedleston Country House, which is the only D2N2 hotel listed on the Mr & Mrs Smith boutique hotels website.

Table6

DERBYSHIRE BOUTIQUE HOTELS (BEYOND THE PEAK DISTRICT)

Hotel	Location	Rooms
Cathedral Quarter Hotel	Derby	38
Kedleston Country House	Kedleston	5

The top-rated Derbyshire hotels on Tripadvisor are shown in the table below.

Table 7

TOP-RATED DERBYSHIRE HOTELS ON TRIPADVISOR – DECEMBER 2016

Hotel	Location	Rooms	Grade/ Type
Morley Hayes	Morley	32	4 star
Casa Hotel	Chesterfield	100	4 star
Premier Inn Chesterfield West	Eastmoor	25	Budget
Peak Edge Hotel	Ashover	26	4 star
The Portland Hotel	Chesterfield	22	n/a
Hogkinson's Hotel	Matlock Bath	8	n/a
Premier Inn Ripley	Ripley	60	Budget
Best Western Buxton Lee Wood	Buxton	38	4 star
Ringwood Hall Hotel	Chesterfield	74	3 star
Travelodge Glossop	Glossop	62	Budget

There are clearly quality issues with a number of hotels in Buxton that are consistently receiving comments on Tripadvisor about their bedrooms and public areas being tired and dated.

Nottingham has five boutique hotels. Four are independently operated, while the fifth is operated under Accor Hotels' Mercure brand.

Table 8

NOTTINGHAM BOUTIQUE HOTELS

Hotel	Rooms
Hart's	32
Lace Market Hotel	42
St James Hotel	87
Mercure Nottingham City Centre	76
Walton Hotel	28

There are no boutique hotels in other parts of Nottinghamshire.

Nottinghamshire has very little provision in terms of country house hotels. None of these hotels are what could be termed luxury or boutique country house hotels.

Table 9

NOTTINGHAMSHIRE COUNTRY HOUSE HOTELS

Hotel	Location	Rooms	Grade
Colwick Hall Hotel	Colwick	16	4 star
Langar Hall	Langar	12	3 star
Cockcliffe House Country House Hotel	Calverton	11	n/a

The top-rated Nottinghamshire hotels on Tripadvisor are shown in the table below.

Table 10

TOP-RATED NOTTINGHAMSHIRE HOTELS ON TRIPADVISOR – DECEMBER 2016

Hotel	Location	Rooms	Grade/ Type
Langar Hall	Langar	12	3 star
Roomzzz Nottingham City	Nottingham	106	Aparthotel
Doubletree by Hilton Nottingham Gateway	Cinderhill	105	4 star
Premier Inn Nottingham City Centre (Chapel Bar)	Nottingham	120	Budget
Warner Leisure Hotels Thoresby Hall Hotel	Thoresby	221	4 star
Best Western Lion Hotel	Worksop	46	3 star
Ye Olde Bell Hotel	Barnby Moor	49	4 star
Premier Inn Nottingham West	Cinderhill	88	Budget
De Vere Orchard Hotel	Nottingham	202	4 star
Lace Market Hotel	Nottingham	84	Boutique

5.2. Inns

The quality of inns and pub accommodation across the D2N2 area is highly variable. The Derbyshire Peak District has a stock of good quality inns that appear to be catering primarily for the tourist market and walkers, including a number of boutique and 5 star inns that offer contemporary accommodation and good food. Elsewhere in Derbyshire, and generally across Nottinghamshire, pub accommodation appears to be more focused on catering for contractors, and offers a more basic standard of accommodation that is less suitable for tourist markets. There are very few boutique and 5 star inns in other locations.

Table 11

D2N2 BOUTIQUE & 5 STAR INNS

Establishment	Location	Rooms	Grade
Derbyshire Peak District			
Crown Inn	Marston Montgomery	7	Boutique
Devonshire Arms at Beeley	Beeley	14	Boutique
Devonshire Arms at Pilsley	Pilsley	7	Boutique
The Lamb Inn	Chinley	3	Boutique
The Old Hall Inn	Chinley	4	4 star
The Samuel Fox Country Inn	Stretfield	4	5 star
The View at the White Horse	Wooley Moor	8	5 star
Elsewhere in Derbyshire			
The Farmhouse at Mackworth	Mackworth	13	Boutique
The Boot Inn	Repton	9	4 star
Nottinghamshire			
Blacksmiths at Clayworth	Clayworth	4	Boutique
The Maypole at Wellow	Wellow	13	Boutique

Table 12

TOP-RATED DERBYSHIRE INNS ON TRIPADVISOR – DECEMBER 2016

Establishment	Location	Rooms	Grade/ Type
Pack Horse Inn	New Mills	12	4 star
The White Hart Inn	Moorwood Moor	10	n/a
The View at The White Horse	Wooley Moor	8	5 star
The George & Dragon	Ashbourne	5	n/a
The Queen's Head Hotel	Buxton	12	n/a
The Boot Inn	Repton	9	4 star
The Old Poet's Corner	Ashover	5	n/a
Queen's Arms Country Inn	Glossop	5	n/a
The Sycamore Inn	Birch Vale	5	n/a
Batemans Mill Hotel	Old Tupton	8	n/a

Table 13

TOP-RATED NOTTINGHAMSHIRE INNS ON TRIPADVISOR – DECEMBER 2016

Establishment	Location	Rooms	Grade/ Type
The Dovecote Inn	Laxton	2	n/a
Bluebell Inn	Lound	3	n/a
The Staunton Arms	Staunton-in-the-Vale	7	n/a
The Hogs Head Hotel	Awsworth	12	n/a
The Lord Nelson Inn	Besthorpe	2	n/a
Nelson and Railway Inn Hotel	Kimberley	11	n/a
Unicorn Hotel	Gunthorpe	14	n/a
The Black Bull	Blidworth	4	n/a
The Lord Nelson	Sutton-on-Trent	7	n/a
The Blacksmiths at Clayworth	Clayworth	4	Boutique

5.3. B&Bs

The quality of B&B accommodation across the D2N2 area appears to be good; Tripadvisor reviews for the area's B&Bs are generally very positive. The style and standard of accommodation offered by B&Bs undoubtedly varies significantly. B&Bs generally appear to offering a warm welcome and the personal service that is sought by B&B customers.

There are a number of 5 star and boutique B&Bs across Derbyshire and Nottinghamshire. Newark and Belper stand out as locations with a number of boutique and 5 star B&Bs.

Table 14

D2N2 BOUTIQUE & 5 STAR B&Bs

Establishment	Location	Rooms	Grade
Derbyshire Peak District			
Bretton Cottage	Eyam	3	5 star
Hinchley Wood	Mappleton	2	Boutique
Holmefield Guest House	Darley Dale	5	5 star
Old Shoulder of Mutton	Winster	3	Boutique
Park View Farm	Ashbourne	3	5 star
Silver Ridge	Tansley	3	5 star
The Barn	Gratton	4	Boutique
The Old Lock-Up	Wirksworth	4	5 star
Underleigh House	Hope	4	5 star
Elsewhere in Derbyshire			
Bridge Hill House	Belper	4	5 star
Chevin Green Farm Bed & Breakfast	Belper	4	5 star
Dannah Farm Country House	Shottle	9	5 star
Hayeswood Lodge	Stanley Common	4	Boutique
The Lavender Patch	Hilton	1	5 star
Nottinghamshire			
Browns	Holbeck	5	5 star Gold
The Ulvers	Cuckney	4	Boutique
Mamma's Inn Boutique Guest House	Nottingham	10	Boutique
Nottingham Lodge	Nottingham	6	5 star
Bridge House B&B	Newark	4	5 star
Compton House	Newark	7	4 star
Manor Court	Thorpe	6	Boutique
Newark Lodge Guest House	Newark	3	5 star
The Georgian Townhouse	Newark	4	5 star Boutique
The Hollies	Newark	3	Boutique
The Lions	Newark	3	Boutique
Willoughby House	Norwell	5	Boutique
The Grange	Elton-on-the-Hill	3	5 star

Table 15

TOP-RATED DERBYSHIRE B&Bs ON TRIPADVISOR – DECEMBER 2016

Establishment	Location	Rooms	Grade/ Type
Bridge Hill House	Belper	4	5 star
Glendon Guest House	Matlock	5	n/a
Griff House Bed & Breakfast	Buxton	5	4 star
Sheriff Lodge	Matlock	5	n/a
Castle Green B&B	Matlock	6	4 star
Roseleigh	Buxton	14	4 star
Hayeswood Lodge	Stanley Common	4	Boutique
Anis Louise Guest House	Chesterfield	6	4 star
Grosvenor House	Buxton	8	n/a
Riverbank Guest House	Matlock	6	n/a

Table 16

TOP-RATED NOTTINGHAMSHIRE B&Bs ON TRIPADVISOR – DECEMBER 2016

Establishment	Location	Rooms	Grade/ Type
Compton House	Newark	7	4 star
Manor Court	Thorpe	6	Boutique
The Lions	Newark	3	Boutique
Mama's Inn Boutique Guest House	Nottingham	10	Boutique
Nottingham Lodge	Nottingham	6	5 star
Newark Lodge Guest House	Newark	3	5 star
Thorpe House Bed & Breakfast	Nottingham	4	n/a
Bridge House B&B	Newark	4	5 star
Maun River Cottage	Ollerton	3	4 star
The Georgian Townhouse	Newark	4	5 star Boutique

5.4. Self-Catering

It is difficult to comment conclusively on the overall quality of self-catering accommodation across the D2N2 area. There is clearly a wide range of different standards and styles of self-catering accommodation available across the two counties. The majority of self-catering properties are not officially graded. Of those that are, most are either 3 star or 4 star properties. There are a number of 5 star properties in the Derbyshire Peak District, but as far as we have been able to establish none in other parts of Derbyshire and none in Nottinghamshire.

DERBYSHIRE PEAK DISTRICT – EXAMPLES OF 5 STAR GOLD HOLIDAY COTTAGES

- Holestone Moore Barns, Ashover www.hmbarns.co.uk
- Blakelow Farm Holiday Cottages, Winster www.blakelowcottages.co.uk
- Churchdale Farm, Ashford-in-the-Water www.churchdaleholidays.co.uk
- Ladybower Apartments, Bamford www.ladybowerapartments.co.uk
- Peak District Holidays, Matlock Bath www.peakdistrictholidays.co.uk
- Duck Cottage, Carsington www.duck-cottage.co.uk
- Weatherwicks Holiday Cottages, Wirksworth https://weathericks.co.uk
- Taylors Croft Cottage, Edale www.taylorscroft-edale.co.uk

Derbyshire and Nottinghamshire have very few contemporary/ boutique holiday cottages. Examples include the following:

D2N2 CONTEMPORARY/BOUTIQUE HOLIDAY COTTAGES

Derbyshire Peak District

- Winsmoor Cottage, Over Haddon www.uniquehomestays.com/self-catering/uk/peak-district/over-haddon/winsmore-cottage
- Robin Hood Cottage, Baslow www.sheepskinlife.com/holiday-home/robin-hood-cottage
- Beavers Croft, Upper Derwent Valley www.ownersdirect.co.uk/accommodation/p6865410
- Chatsworth Estate Holiday Cottages www.chatsworthcottages.co.uk
- Winster Hall, Winster www.winsterhall.co.uk
- Dale End House, Gratton www.daleendhouse.co.uk
- Mappleton Manor, Mappleton www.mappletonmanor.co.uk

Derbyshire

- The Old Cheese Factory, Windley www.theoldcheesefactory.com
- Dannah Cottages, Kirk Ireton www.dannahcottages.co.uk

Nottinghamshire

- Purple Poppy Cottage, Burton Joyce http://purplepoppycottage.co.uk
- Langar Near The Hall, Langar www.langarnearthehall.co.uk

Center Parcs Sherwood Forest stands out as the largest single self-catering holiday operation in the D2N2 area. It has over 900 holiday villas supported by a wide range of indoor and outdoor leisure, sports, entertainment and dining facilities.

There are a number of 5 star holiday lodge parks on the edge of the Peak District National Park, in the National Forest and in Sherwood Forest.

Table 17

D2N2 5 STAR HOLIDAY LODGE PARKS

Establishment	Location	Lodges
Derbyshire Peak District (Outside the National Park[1])		
Darwin Forest Country Park	Two Dales	110
Sandybrook Country Park	Ashbourne	53
The National Forest/South Derbyshire		
Ashby Woulds Lodges	Overseal	20
Swainswood Leisure Park	Overseal	38
Mercia Marina	Willington	23
Nottinghamshire		
Forest Holidays Sherwood Forest	Sherwood Pines	82
The Sherwood Hideaway	Thoresby	30

Notes:
1. The Peak District National Park Authority's current planning policy approach does not permit the development of holiday lodge parks in the National Park.

There are also a number of smaller, lower standard holiday lodge parks and complexes across the D2N2 area, including Rosliston Forestry Centre, Beechwood Park and Oaklands Country Lodges in South Derbyshire, and Sherwood Castle Holiday Forest and Redbrick Woodland Lodges in Sherwood Forest.

The Derbyshire Peak District has a number of holiday cottage complexes with indoor swimming pools and leisure complexes.

Table 18
DERBYSHIRE PEAK DISTRICT – HOLIDAY COTTAGE COMPLEXES WITH LEISURE

Establishment	Location	Units
Bolehill Holiday Cottages	Bakewell	8
Harthill Hall Country House Cottages	Alport	9
Hopton Hall Holiday Cottages	Hopton	5
Knockerdown Cottages	Carsington Water	17
Moor Grange Farm	Buxton	4
Netherton Hall	Bradbourne	4
Standlow	Kniveton	6

There is a good supply of luxury 'super' cottages suitable for family and friend get togethers and celebrations in the Peak District, including a number of former pubs and guest houses that have been converted to provide self-catering accommodation for large groups. There is very little of this type of accommodation in other parts of Derbyshire or Nottinghamshire.

D2N2 LUXURY 'SUPER' COTTAGES

Establishment	Location	Bedspaces
Derbyshire Peak District		
Benty Grange	Monyash	20
Brosterfield Farmhouse	Foolow	20
Cliff House	Monsal Head	32
Crewe & Harpur	Longnor	30
Dale House	Litton	30
Lea Hall	Lea	20
The Derwent Country House	Bamford	40
The Star at Taddington	Taddington	26
Riber Hall	Riber	18
Thornbridge Manor	Great Longstone	24
Ashbourne Hall	Ashbourne	22
Hollywood House	Blackbrook	40
Nottinghamshire		
Horspool Luxury Retreat	Bleasby	25

The D2N2 area has very few 'Access Exceptional' holiday cottages or lodges that have been specifically adapted for use by an independent wheelchair user, and only four establishments (shaded in the table below) that specialise in holidays for people in wheelchairs and those with other disabilities, with 'Access Exceptional' properties that are suitable for use by an independent wheelchair user.

D2N2 WHEELCHAIR ACCESSIBLE HOLIDAY COTTAGES & LODGES

Establishment	Location	Wheelchair-friendly Units
Derbyshire Peak District		
Hoe Grange Holidays	Brassington	4
Old House Farm Cottages	Newhaven	1
Rivendale Caravan Park	Alsop-en-le-Dale	7
Spingle Barn	Monyash	1
The Room for All Seasons	Abney	1
Wheeldon Trees Farm	Earl Sterndale	1
The National Forest (South Derbyshire)		
Rosliston Forestry Centre Lodges	Rosliston	6
Nottinghamshire		
Center Parcs Sherwood Forest	Rufford	n/k
Forest Holidays Sherwood Forest	Sherwood Pines	n/k

5.5. Touring Caravan & Camping Sites

It is also difficult to comment on the overall quality of touring caravan and camping sites across the D2N2 area as there is such a wide range of different sizes and standards of site across the two counties. There is a good choice of large 4 and 5 star Caravan Club, Camping & Caravanning Club and independent touring caravan and camping sites across all parts of Derbyshire and Nottinghamshire. Such sites will typically have electric hook up points to most, if not all pitches, and will have a number of hard standing pitches and in some cases fully serviced ‘super’ pitches with water and mains sewerage connection. They will also be well landscaped, have a good infrastructure of tarmacked roads, and have high quality, usually heated toilet and shower blocks. In some cases, they also have a range of central facilities including a site shop, children’s play areas, on-site pub or café, and possible indoor and outdoor leisure facilities. Small to medium-sized sites (with 20-50 pitches) may have predominantly grass pitches, perhaps not all with electric hook up, and may have more basic and limited facilities. Certificated (5-pitch) sites generally offer minimal facilities other than water and waste disposal. Some sites also offer other forms of accommodation such as camping pods, holiday lodges for sale or rental, ready-pitched tents and glamping units. There appears to be a broadly even spilt between sites that operate on a seasonal basis and those that are open all year round.

5.6. Group & Youth Accommodation

Group and youth accommodation is by definition a relatively basic type of accommodation, but can vary in terms of standard. The Mount Cook Adventure Centre stands out as a new outdoor education centre that offers a good standard of modern en-suite 4-bedded bedrooms. YHA hostels in the Derbyshire Peak District range from the 4 star graded Hartington Hall and Castleton Losehill Hall hostels to the more basic 2 star Hathersage and Edale hostels. The Sherwood Forest hostel is graded as a 4 star hostel. The outdoor education centres in the Derbyshire Peak District all appear to offer a fairly basic standard of bunk-bedded accommodation for schoolchildren and youth groups.

In Nottingham the Igloo Annexe & Pods and Igloo Hybrid hostels offer a boutique style of hostel accommodation, while the Midtown Hostel is a more basic hostel.

APPENDIX 4

D2N2 CHANGES IN VISITOR ACCOMMODATION SUPPLY

1. NEW HOTELS

Hotel	Location	Standard	No. Rooms	Year Opened
Premier Inn Derby City Centre (Cathedral Quarter)	Derby	Budget	118	2016
Holiday Inn Derby Riverlights	Derby	3 star	105	2010
Hampton by Hilton Derby (now the Premier Inn Derby Riverlights)	Derby	Budget	138	2010
Casa Hotel	Chesterfield	4 star	100	2010
Peak Edge Hotel	Ashover	4 star	26	2011
Premier Inn Buxton	Buxton	Budget	60	2016
Premier Inn Matlock	Matlock	Budget	58	2016
Travelodge Glossop	Glossop	Budget	62	2012
Orchard Hotel	Nottingham	4 star	202	2012
Birchover Residences	Nottingham	Serviced Apartments	5	2014
The Residence at The Nottinghamshire	Cotgrave	Boutique golf hotel	18	2016

2. HOTEL EXTENSIONS, REFURBISHMENT PROGRAMMES & RE-BRANDINGS

Hotel	Location	Standard	Details of Project
Pentahotel Derby (Rebranding)	Derby	Lifestyle	Formerly Ramada Encore
Premier Inn Derby Riverlights (Rebranding)	Derby	Budget	Formerly Hampton by Hilton
Travelodge Derby Cricket Ground (Rebranding)	Derby	Budget	Formerly Days Hotel
Premier Inn Derby West/ Premier Inn Derby South	Derby	Budget	The two hotels were extended in 2016, with an additional 44 bedrooms between them
Premier Inn Derby East	Derby	Budget	Full refurbishment completed June 2016
Holiday Inn Express Derby Pride Park	Derby	Budget	Soft refurbishment completed May 2016
Holiday Inn Nottingham Derby	Sandiacre	3 star	Bedroom refurbishment 2015/16
Novotel Nottingham Derby	Long Eaton	4 star	£3.5 refurbishment
Ringwood Hall Hotel	Chesterfield	3 star	New owners March 2016. Bedroom refurbishment 2016. New spa opened September 2016.
New Bath Hotel & Spa	Matlock Bath	Boutique	Reopened as a boutique hotel in September 2016 following a complete refurbishment under new owners.

Best Western Lee Wood Hotel	Buxton	4 star	Upgraded to 4 stars
Palace Hotel	Buxton	4 star	Added 40 bedrooms
Kedleston Country House	Kedleston	Boutique	Reopened in 2015 with a first phase of 5 bedrooms
Crowne Plaza Nottingham	Nottingham	4 star	£3.2m bedroom refurbishment 2016 + £1.1m upgrade to leisure club
Park Plaza Nottingham	Nottingham	4 star	Bedroom and restaurant refurbishment
Lace Market Hotel	Nottingham	Boutique	Reopened October 2015 following a £600k refurbishment by new owners
St James Hotel	Nottingham	Boutique	Reopened June 2014 as a boutique hotel following a £2m refurbishment under new owners. Formerly the Rutland Square Hotel.
Walton Hotel	Nottingham	Boutique	Refurbished as a boutique hotel in 2015
Mercure Nottingham City Centre	Nottingham	Boutique	Reopened as a boutique hotel in 2011. Formerly The George Hotel.
Premier Inn Nottingham City Centre (Chapel Bar) (Rebranding)	Nottingham	Budget	Rebranded August 2015 -formerly Holiday Inn Express
Roomzzz Nottingham (Rebranding)	Nottingham	Aparthotel	Opened January 2015 following a £3m refurbishment - formerly The Welbeck Hotel
Ramada Nottingham City Centre (Rebranding)	Nottingham	3 star	Formerly Days Hotel
Bentinck Hotel	Nottingham	Lower grade	Hotel refurbished 2013 under new owners
Village Hotel Club	Chilwell	3 star	£3m refurbishment 2016
Doubletree by Hilton Nottingham Gateway (Rebranding)	Cinderhill	4 star	£5.5m refurbishment. Formerly the Nottingham Gateway
Mansfield Manor (Rebranding)	Mansfield	n/a	Refurbishment completed 2012. Formerly the Portland Hall Hotel
Clumber Park Hotel	Worksop	3 star	28 bedrooms refurbished + public areas and spa
Ye Olde Bell	Barnby Moor	4 star	Full refurbishment

3. HOTEL CLOSURES

Hotel	Location	Standard	No. Rooms	Comments
St Peter's Quarter Hotel	Derby	Lower grade		
La Gondola	Derby	Lower grade	20	
Rangemoor Park Hotel	Derby			
Chesterfield Hotel	Chesterfield	3 star	73	Closed 2015
Green Man & Black's Head Royal Hotel	Ashbourne	Lower grade	17	
Moss Cottage Hotel	Ripley	Lower grade		Sold to property developer in 2014
The Paddock Hotel	Melbourne	Lower grade		
Swans Hotel	West Bridgford	3 star	30	Converted to residential apartments
Rufford Hotel	West Bridgford	Lower grade		Converted to flats
Midland Hotel	Mansfield	Lower grade		
Dukeries Park Hotel	Worksop	Lower grade	11	
Best Western Leicester North	Upper Broughton	3 star	54	

4. HOTELS FOR SALE

Hotel	Location	Standard	No. Rooms	Comments
Chesterfield Hotel	Chesterfield	3 star	73	The selling agents for the hotel reported that they have a potential buyer that is interested in reopening the hotel
Sandpiper Hotel	Sheepbridge	Lower grade	24	
The Gallery Hotel	West Bridgford	Lower grade	16	
Sun Inn	Eastwood	Lower grade	15	
Clumber Park Hotel	Worksop	3 star		

5. INN DEVELOPMENTS

Establishment	Location	Standard	Details of Project
The Boot	Repton	Boutique	Reopened February 2016 following refurbishment
The Farmhouse at Mackworth	Mackworth	Boutique	Upgraded to a boutique inn by the Revere Pub Company
The Black Bull	Blidworth	n/a	Opened 4 guest bedrooms in 2015
The Blacksmiths	Clayworth	Boutique	Refurbished as a boutique inn

6. HOLIDAY LODGE PARK DEVELOPMENTS

Establishment	Location	Details of Project
Darwin Forest Country Park	Two Dales	26 new VIP lodges added in 2016 + bar and restaurant extension and new activity den.
Hoe Grange Holidays	Brassington	Added two lodges in 2010/11 + two pods in 2016
Ashby Woulds Luxury Lodges	Overseal	Opened 2014 (20 lodges)
Mercia Marina	Wilmington	Added 8 lodges in 2015
Forest Holidays Sherwood Forest	Sherwood Pines	Opened 2012. Added 17 lodges in 2014
The Sherwood Hideaway	Thoresby	Opened 2010 (24 lodges). Added 6 lodges in 2015.

7. CARAVAN & CAMPING SITE DEVELOPMENTS

Site	Location	Details of Project
Longnor Wood Holiday Park	Longnor	£160k upgrading programme
Greenhills Holiday Park	Bakewell	13 static caravans added 2010
Rivendale Caravan & Leisure Park	Alsop-en-le-Dale	£100k improvement programme
Lickpenny Caravan Park	Tansley	Tarmacked site roads
Springwood Fisheries	Melbourne	Added 6 camping pods in 2014
Sherwood Forest Holiday Park	Kings Clipstone	New toilet and shower block, additional electric hook ups, new lighting and faster broadband
Smeaton Lakes	Newark	Site improvements and pitch upgrading
Teversal Camping & Caravanning Club Site	Teversal	Safari tent added 2010. Camping cabin added 2011. Six static caravans added 2016.

8. CARAVAN & CAMPING SITE CLOSURES

Site	Location	Comments
Elvaston Castle Country Park Caravan Club Site	Elvaston	Closed 2012

9. GROUP & YOUTH ACCOMMODATION DEVELOPMENTS

Establishment	Location	Bedspaces	Details of Project
Mount Cook Adventure Centre	Middleton-by-Wirksworth		Opened July 2016
YHA Castleton Losehill Hall	Castleton		Opened 2012
YHA Hartington Hall	Hartington		£250k refurbishment
YHA Edale	Edale		£250k refurbishment
Thornbridge Manor	Great Longstone		£180k improvement programme 2012/13
Igloo Hybrid Hostel	Nottingham		Opened July 2015

10. HOSTEL CLOSURES

Hostel	Location	Comment
YHA Crowden	Crowden, Glossop	Now operated as the Crowden Outdoor Education Centre by Rotherham Borough Council
YHA Bretton	Hope Valley	
Abney Camping Barn	Abney, Derbyshire Dales	

APPENDIX 5

D2N2 VISITOR ACCOMMODATION STRATEGY
SURVEY OF SMALL ACCOMMODATION BUSINESSES
SURVEY RESULTS - DERBYSHIRE

1. Purpose of the Survey

The purpose of the survey of owners of small accommodation businesses was to provide an insight into the current strength of demand and markets for different types of small visitor accommodation business in the D2N2 area, evidence of times when there may be shortages of accommodation (because existing accommodation businesses are fully booked), and an understanding of the aspirations of the current owners of small visitor accommodation establishments to expand, develop and upgrade their premises.

2. Methodology and Sample

The survey was undertaken through a CATI (computer assisted telephone interview) survey of a random sample of 100 B&Bs and guest houses, inns and pub accommodation businesses, self-catering establishments, touring caravan and camping sites, and hostels and camping barns. The survey sample was broken down by type of visitor accommodation business as follows:

TABLE 1: SURVEY SAMPLE

Type of Accommodation Business	Number of Completed Interviews
B&Bs and Guest Houses	31
Inns	13
Self-Catering	35
Caravan and Camping Sites	15
Hostels/Camping Barns	6
Total Interviews	**100**

3. Length of Time Accommodation Businesses Have Been Established

The majority of the accommodation businesses interviewed are well established businesses that have been operating for at least 3 years.

TABLE 2: LENGTH OF TIME ACCOMMODATION BUSINESSES HAVE BEEN ESTABLISHED

Type of Accommodation Business	% of Accommodation Businesses Interviewed	
	Operating for Under 3 Years	Operating for More Than 3 Years
B&Bs and Guest Houses	19	81
Inns/ Pub Accommodation	15	85
Self-Catering	9	91
Caravan and Camping Sites	13	87
Hostel/Camping Barn	0	100

4. Seasonal Operation of Accommodation Businesses

Perhaps unsurprisingly a majority of the touring caravan and camping sites interviewed were seasonal operations. A significant minority (40%) are however open all year and 22% are planning to extend their opening season in the next 2 years. A third of hostels and camping barns were also seasonal operations. The other types of visitor accommodation business interviewed mainly open all year.

TABLE 3: SEASONAL OPERATION OF ACCOMMODATION BUSINESSES

Type of Accommodation Business	% of Accommodation Businesses Interviewed	
	Operating on a Seasonal Basis	Open All Year
B&Bs and Guest Houses	13	87
Inns/ Pub Accommodation	0	100
Self-Catering	3	97
Caravan and Camping Sites	60	40
Hostel/Camping Barn	33	67

5. Recent and Planned Investment

5.1. Expansion in the Last 3 Years

A third of the pub accommodation businesses interviewed and 40% of caravan and camping sites reported that they have expanded in the last 3 years: a number of inns have opened additional guest bedrooms, and several touring caravan and camping site have increased their number of pitches and/or added camping pods and ready pitched tents. Very few guest houses and B&Bs, and none of the self-catering businesses, hostels or camping barn operations that we interviewed have expanded however.

TABLE 4: ACCOMMODATION BUSINESS EXPANSION IN THE LAST 3 YEARS

Type of Accommodation Business	% of Accommodation Businesses Interviewed	
	Expanded in the Last 3 Years	Not Expanded in the Last 3 Years
B&Bs and Guest Houses	6	94
Inns/ Pub Accommodation	31	69
Self-Catering	0	100
Caravan and Camping Sites	40	60
Hostel/Camping Barn	0	100

5.2. Planned Investment in the Next 2 Years

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

- Pub accommodation businesses adding new guest bedrooms, self-catering units, a bunkhouse and glamping units;
- Self-catering establishments adding new letting units;
- Touring caravan and camping site operators upgrading toilet and shower blocks, improving their environmental sustainability, and adding camping pods and glamping units.

TABLE 5: ACCOMMODATION BUSINESS INVESTMENT PLANS IN THE NEXT 2 YEARS

Type of Accommodation Business	% of Accommodation Businesses Interviewed	
	Investment Planned in the Next 2 Years	No Investment Planned in the Next 2 Years
B&Bs and Guest Houses	3	97
Inns/ Pub Accommodation	38	62
Self-Catering	14	86
Caravan and Camping Sites	67	33
Hostel/Camping Barn	33	67

5.3. Barriers to Investment

40% of the accommodation businesses that are planning investment identified some form of barrier to them being able to progress their plans. Getting finance was identified as the most significant barrier. Securing planning permission was also identified as a barrier by some accommodation businesses.

TABLE 6: BARRIERS TO EXPANSION, DEVELOPMENT AND UPGRADING PLANS

Type of Accommodation Business	% of Accommodation Businesses Planning Investment Citing This Barrier	
	Getting Planning Permission	Financing the Project
B&Bs and Guest Houses	100	0
Inns/ Pub Accommodation	0	40
Self-Catering	40	40
Caravan and Camping Sites	10	20
Hostel/Camping Barn	0	50

6. Occupancy Levels, Trends and Future Prospects

6.1. 2015 Occupancy Levels

Occupancy levels were strong in 2015 for the pub accommodation businesses interviewed (with 93% of them reporting an average annual room occupancy of over 50%).

Occupancy performance was also good for B&Bs and guest houses and self-catering establishments, with 77% and 78% of these types of business reporting average annual room occupancies in excess of 50%. As a comparison for B&Bs and guest houses, the England Occupancy Survey shows a national average annual room occupancy for B&Bs in 2015 of 53%, and 55% for guest houses. The findings of our survey suggest that Derbyshire guest houses and B&Bs traded above these levels of occupancy in 2015.

Pitch occupancies reported for Derbyshire caravan and camping sites are not quite as strong (with 60% of interviewed operators reporting an average annual occupancy of over 50%). This type of accommodation has a higher proportion of seasonally operating businesses however, which achieve lower average annual pitch occupancies.

Hostels and camping barns achieve relatively low levels of occupancy. Only 17% of those interviewed reported an average annual occupancy of over 50%. Such accommodation predominantly operates on a seasonal basis however.

TABLE 7: OCCUPANCY LEVELS 2015

Type of Accommodation Business	% of Accommodation Businesses Interviewed Reporting This Occupancy Level					
	Above 70%	61-70%	51-60%	41-50%	31-40%	Under 30%
B&Bs and Guest Houses	35	10	32	16	11	0
Inns/ Pub Accommodation	54	31	8	8	6	0
Self-Catering	23	29	26	14	10	0
Caravan and Camping Sites	20	20	20	20	20	0
Hostel/Camping Barn	0	0	17	33	50	0

6.2. Occupancy Trends 2013-2015

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

TABLE 8: OCCUPANCY TRENDS 2013-2015

Type of Accommodation Business	% of Accommodation Businesses Interviewed Reporting a Change in Occupancy in the Last 3 Years			
	An Increase	No Change	A Decrease	Don't Know
B&Bs and Guest Houses	32	42	13	13
Inns/ Pub Accommodation	69	15	8	8
Self-Catering	23	57	20	0
Caravan and Camping Sites	60	27	7	7
Hostel/Camping Barn	17	67	0	17

6.3. Future Prospects

Looking forward pub accommodation operators are particularly optimistic about the prospects for growth in their occupancy levels in the next 3 years. A number of B&Bs and guest houses, touring caravan and camping site owners and hostel and camping barn operators, some self-catering accommodation providers also see potential to increase their occupancies.

TABLE 9: OCCUPANCY PROSPECTS 2016 -2019

Type of Accommodation Business	% of Accommodation Businesses Interviewed Expecting a Change in Occupancy in the Next 3 Years			
	An Increase	No Change	A Decrease	Don't Know
B&Bs and Guest Houses	35	42	6	16
Inns/ Pub Accommodation	62	31	0	8
Self-Catering	26	49	3	23
Caravan and Camping Sites	47	40	0	13
Hostel/Camping Barn	50	33	17	0

6.4. Reasons for Changes in Occupancy Performance

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

- A new business, so demand still building;
- Increased/ improved marketing, particularly in terms of internet marketing and the use of online travel agents such as booking.com and LateRooms;
- Increased business through Facebook;
- Good weather;
- The improved economic outlook;
- Growing demand for short breaks;
- The growth of the staycation market and increased demand from overseas tourists, particularly in the wake of the EU Referendum result and the subsequent drop in the value of sterling
- Upgrading/ an improved product;
- Good reviews on Tripadvisor;
- Repeat business;
- The introduction of seasonal tourer pitches (for one caravan and camping site)
- The introduction of camping pods at caravan and camping sites.

Reasons cited for decreases in occupancy levels were:

- Taking less business as nearing retirement or due to illness or personal circumstances;
- A drop in European visitors (for one B&B);
- More competition in terms of self-catering accommodation;
- Disruption to the market in June 2016 as a result of the EU Referendum;
- A drop in business from Alton Towers as a result of the Smiler accident in 2015.

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

The survey findings show clear evidence of frequent shortages of all forms of visitor accommodation, other than hostels and camping barns, at weekends (Friday and Saturday nights) between April and October and during the week in the peak summer months (June to early September). Some pub accommodation businesses and a few B&Bs and guest houses and self-catering properties also often trade at full capacity during the winter months, both at weekends and during the week. The majority of hostels and camping barns are frequently fully booked at weekends in the winter. Most self-catering businesses and caravan and camping sites have spare capacity during the winter however.

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

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

Type of Accommodation Business	% of Accommodation Businesses Interviewed Trading at Full Capacity				
	Every Weekend	Most Weekends	Some Weekends	Not Many weekends	No Weekends
B&Bs and Guest Houses	42	52	6	0	0
Inns/ Pub Accommodation	69	31	0	0	0
Self-Catering	20	54	17	0	9
Caravan and Camping Sites	27	47	27	0	0
Hostel/Camping Barn	0	50	33	17	0

TABLE 11: WEEKEND (FRIDAY/SATURDAY) OCCUPANCY NOVEMBER - MARCH

Type of Accommodation Business	% of Accommodation Businesses Interviewed Trading at Full Capacity				
	Every Weekend	Most Weekends	Some Weekends	Not Many weekends	No Weekends
B&Bs and Guest Houses	10	23	42	0	0
Inns/ Pub Accommodation	23	46	31	0	0
Self-Catering	3	17	34	23	23
Caravan and Camping Sites	0	13	13	7	67
Hostel/Camping Barn	0	67	0	0	33

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

Type of Accommodation Business	% of Accommodation Businesses Interviewed Trading at Full Capacity				
	Most of the Time	Quite Often	Occasionally	Not Very Often	Not At All
B&Bs and Guest Houses	35	55	10	0	0
Inns/ Pub Accommodation	62	38	7	0	0
Self-Catering	57	20	14	6	3
Caravan and Camping Sites	33	13	7	40	7
Hostel/Camping Barn	0	17	50	33	0

TABLE 14: MIDWEEK OCCUPANCY - WINTER MONTHS

Type of Accommodation Business	% of Accommodation Businesses Interviewed Trading at Full Capacity				
	Most of the Time	Quite Often	Occasionally	Not Very Often	Not At All
B&Bs and Guest Houses	0	13	35	39	13
Inns/ Pub Accommodation	23	23	46	8	0
Self-Catering	0	14	23	40	23
Caravan and Camping Sites	0	0	13	13	73
Hostel/Camping Barn	0	0	17	33	50

8. Key Markets and Their Future Growth Potential

8.1. Key Markets for Derbyshire Accommodation Businesses

Tables 15-19 overleaf provide a breakdown of the importance of different visitor markets for each type of accommodation. Key conclusions from these tables are as follows:

- The key markets for all types of small visitor accommodation business in Derbyshire are people coming for short breaks, walkers and those coming to take part in outdoor activities. People coming for a walking break and to participate in outdoor activities are the primary market for caravan and camping sites and hostels and camping barns. These are also likely to be key markets for accommodation businesses in the Derbyshire Peak District.
- The next most important markets are people coming for a particular event or festival and people attending weddings and family parties. Events that were identified as generating good business for accommodation establishments were Chatsworth Country Fair, Chatsworth Horse Trials, Chatsworth Festival, Christmas at Chatsworth, the Eroica Britannia Cycling Festival, Buxton Festival, The Big Session in Buxton, Bakewell Show, Bakewell Flower Show, Y Not Festival, Download Festival, Wirksworth Arts Festival, Matlock Victorian Weekend, Edale Festival, Hayfield Show, Ashbourne Sheep Fair, Ashbourne Show, climbing events at Stanage, Hillhead Quarry Exhibition, events at Alton Towers.
- People staying for a longer holiday or a week or more are an important market for a proportion of B&Bs and guest houses, inns, self-catering properties and caravan and camping sites.
- Overseas tourists are an important market for serviced accommodation businesses (B&Bs, guest houses and inns) but of less importance for self-catering properties, caravan and camping sites and hostels and camping barns.
- Business visitors and contractors are an important source of business for B&Bs, guest houses and inns, but a minor market for other types of accommodation.

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

Visitor Market	% of Accommodation Businesses Interviewed Indicating This Rating			
	Very Important	Quite Important	Slightly Important	Not At All Important
People coming to stay for a relaxing short break	87	13	0	0
People coming for a few days of walking	71	19	6	3
People coming to undertake outdoor activities	61	26	6	6
People coming for a longer holiday (1 week +)	26	23	29	23
People coming for a particular event or festival	39	39	19	3
Overseas tourists	29	55	10	6
People attending weddings and family parties	35	35	13	16
Business visitors	26	29	23	23
Contractors and workmen	23	16	26	35

TABLE 16: KEY MARKETS FOR INNS & PUB ACCOMMODATION

Visitor Market	% of Accommodation Businesses Interviewed Indicating This Rating			
	Very Important	Quite Important	Slightly Important	Not At All Important
People coming to stay for a relaxing short break	54	46	0	0
People coming for a few days of walking	62	31	0	8
People coming to undertake outdoor activities	46	31	15	8
People coming for a longer holiday (1 week +)	15	23	38	23
People coming for a particular event or festival	54	23	8	15
Overseas tourists	15	31	46	8
People attending weddings and family parties	54	31	0	15
Business visitors	46	31	15	8
Contractors and workmen	23	31	23	23

TABLE 17: KEY MARKETS FOR SELF-CATERING ACCOMMODATION BUSINESSES

Visitor Market	% of Accommodation Businesses Interviewed Indicating This Rating			
	Very Important	Quite Important	Slightly Important	Not At All Important
People coming to stay for a relaxing short break	43	37	17	3
People coming for a few days of walking	57	34	9	0
People coming to undertake outdoor activities	37	31	23	9
People coming for a longer holiday (1 week +)	20	31	34	14
People coming for a particular event or festival	17	43	20	20
Overseas tourists	3	23	54	20
People attending weddings and family parties	14	34	34	17
Business visitors	6	6	34	54
Contractors and workmen	0	6	14	80

TABLE 18: KEY MARKETS FOR TOURING CARAVAN & CAMPING SITES

Visitor Market	% of Accommodation Businesses Interviewed Indicating This Rating			
	Very Important	Quite Important	Slightly Important	Not At All Important
People coming to stay for a relaxing short break	80	7	13	0
People coming for a few days of walking	87	7	7	0
People coming to undertake outdoor activities	73	27	0	0
People coming for a longer holiday (1 week +)	27	33	20	20
People coming for a particular event or festival	27	40	33	0
Overseas tourists	7	33	47	13
People attending weddings and family parties	7	33	47	13
Business visitors	7	0	7	87
Contractors and workmen	0	7	13	80

TABLE 19: KEY MARKETS FOR HOSTELS & CAMPING BARNS

Visitor Market	% of Accommodation Businesses Interviewed Indicating This Rating			
	Very Important	Quite Important	Slightly Important	Not At All Important
People coming to stay for a relaxing short break	67	33	0	0
People coming for a few days of walking	100	0	0	0
People coming to undertake outdoor activities	100	0	0	0
People coming for a longer holiday (1 week +)	0	33	17	50
People coming for a particular event or festival	17	33	17	33
Overseas tourists	17	17	67	0
People attending weddings and family parties	33	33	17	0
Business visitors	0	0	17	83
Contractors and workmen	0	0	17	83

8.2. Potential Growth Markets for the Future

The markets seen as offering the strongest growth potential for small accommodation businesses in Derbyshire are people coming for short breaks, walkers, and those coming to take part in outdoor activities. These latter two markets are seen as offering particularly strong growth potential for caravan and camping sites and hostels and camping barns. People coming for events and festivals and attending weddings and family parties are also seen as growth markets for all types of accommodation. The Chatsworth RHS Show was identified as a major new event for 2017 that is already generating bookings for accommodation businesses. Caravan and camping site operators see potential to increase demand for long holidays. Some B&Bs and guest houses and caravan and camping site operators identified overseas tourists as a growth market. Business visitors and contractors are identified as offering growth potential for some B&Bs and guest houses and inns. These are not seen as growth markets for other types of accommodation however.

TABLE 20: GROWTH MARKETS FOR SMALL DERBYSHIRE ACCOMMODATION BUSINESSES

Visitor Market	% of Accommodation Businesses Interviewed Identifying This Market as Offering Growth Potential				
	B&Bs/ Guest Houses	Inns/ Pub Accom	Self-Catering Businesses	Touring Caravan & Camping Sites	Hostels & Camping Barns
People coming to stay for a relaxing short break	58	69	29	93	67
People coming for a few days of walking	55	46	29	73	100
People coming to undertake outdoor activities	35	38	26	87	83
People coming for a longer holiday (1 week +)	16	8	17	47	17
People coming for a particular event or festival	39	38	11	47	33
Overseas tourists	35	8	9	40	17
People attending weddings and family parties	16	31	29	27	33
Business visitors	26	31	9	13	17
Contractors and workmen	19	23	3	13	0

APPENDIX 6

D2N2 VISITOR ACCOMMODATION STRATEGY
SURVEY OF SMALL ACCOMMODATION BUSINESSES
SURVEY RESULTS – NOTTINGHAMSHIRE

1. Purpose of the Survey

The purpose of the survey of owners of small accommodation businesses was to provide an insight into the current strength of demand and markets for different types of small visitor accommodation business in the D2N2 area, evidence of times when there may be shortages of accommodation (because existing accommodation businesses are fully booked), and an understanding of the aspirations of the current owners of small visitor accommodation establishments to expand, develop and upgrade their premises.

2. Methodology and Sample

The survey was undertaken through a CATI (computer assisted telephone interview) survey of a random sample of 64 B&Bs and guest houses, inns and pub accommodation businesses, self-catering establishments and touring caravan and camping sites. The survey sample was broken down by type of visitor accommodation business as follows:

TABLE 1: SURVEY SAMPLE

Type of Accommodation Business	Number of Completed Interviews
B&Bs and Guest Houses	25
Inns	15
Self-Catering	15
Caravan and Camping Sites	9
Total Interviews	**64**

3. Length of Time Accommodation Businesses Have Been Established

The majority of the accommodation businesses interviewed are well established businesses that have been operating for at least 3 years. A number were newer businesses that had opened in the last 3 years.

TABLE 2: LENGTH OF TIME ACCOMMODATION BUSINESSES HAVE BEEN ESTABLISHED

Type of Accommodation Business	% of Accommodation Businesses Interviewed	
	Operating for Under 3 Years	Operating for More Than 3 Years
B&Bs and Guest Houses	4	96
Inns/ Pub Accommodation	20	80
Self-Catering	27	73
Caravan and Camping Sites	11	89

4. Seasonal Operation of Accommodation Businesses

Perhaps unsurprisingly a number of the touring caravan and camping sites interviewed were seasonal operations. A majority (56%) were however open all year and a quarter of seasonal sites are planning to extend their opening season in the next 2 years. All of the other types of visitor accommodation business interviewed were open all year.

TABLE 3: SEASONAL OPERATION OF ACCOMMODATION BUSINESSES

Type of Accommodation Business	% of Accommodation Businesses Interviewed	
	Operating on a Seasonal Basis	Open All Year
B&Bs and Guest Houses	0	100
Inns/ Pub Accommodation	0	100
Self-Catering	0	100
Caravan and Camping Sites	44	56

5. Recent and Planned Investment

5.1. Expansion in the Last 3 Years

Very few of the small accommodation businesses that were interviewed in Nottinghamshire have expended in the last 3 years. Two B&Bs had added bedrooms, two self-catering properties had expended, and one caravan and camping site had added new pitches.

TABLE 4: ACCOMMODATION BUSINESS EXPANSION IN THE LAST 3 YEARS

Type of Accommodation Business	% of Accommodation Businesses Interviewed	
	Expanded in the Last 3 Years	Not Expanded in the Last 3 Years
B&Bs and Guest Houses	8	92
Inns/ Pub Accommodation	0	100
Self-Catering	13	87
Caravan and Camping Sites	11	89

5.2. Planned Investment in the Next 2 Years

A number of the inns that were interviewed in Nottinghamshire have plans to open additional bedrooms in the next 2 years. One self-catering operator indicated that they are looking at another two self-catering barn conversions, and three caravan and camping sites are planning improvements in terms of more hard standing pitches, upgrading a toilet and shower block, and adding more pitches. Only one B&B had any planned investment. This was in terms of refurbishment.

TABLE 5: ACCOMMODATION BUSINESS INVESTMENT PLANS IN THE NEXT 2 YEARS

Type of Accommodation Business	% of Accommodation Businesses Interviewed	
	Investment Planned in the Next 2 Years	No Investment Planned in the Next 2 Years
B&Bs and Guest Houses	4	96
Inns/ Pub Accommodation	40	60
Self-Catering	20	80
Caravan and Camping Sites	33	67

5.3. Barriers to Investment

Two thirds of the accommodation businesses that are planning investment identified some form of barrier to them being able to progress their plans. Getting finance and securing planning permission were identified as the most common barriers.

TABLE 6: BARRIERS TO EXPANSION, DEVELOPMENT AND UPGRADING PLANS

Type of Accommodation Business	% of Accommodation Businesses Planning Investment Citing This Barrier	
	Getting Planning Permission	Financing the Project
B&Bs and Guest Houses	0	100
Inns/ Pub Accommodation	50	33
Self-Catering	33	33
Caravan and Camping Sites	33	0

6. Occupancy Levels, Trends and Future Prospects

6.1. 2015 Occupancy Levels

2015 occupancy performance for the interviewed accommodation businesses was strongest for caravan and camping sites, with 77% of the sites interviewed reporting an average annual pitch occupancy of over 50%. This is much higher than in Derbyshire, where only 60% of sites reported an annual pitch occupancy of over 50%.

Occupancy performance for Nottinghamshire B&Bs and guest houses was not as strong as in Derbyshire, and was more variable. 72% of the B&Bs and guest houses interviewed in Nottinghamshire reported an average annual room occupancy of over 50% (compared to 77% in Derbyshire). A higher percentage of Nottinghamshire B&Bs and guest houses achieved an annual room occupancy of over 60% however (64% compared to 45% in Derbyshire) but more B&Bs and guest houses in Nottinghamshire traded at an annual room occupancy of under 30% (8% of the interviewed B&Bs and guest houses in Nottinghamshire but none in Derbyshire). While we have not been able to calculate an average annual room occupancy figure for Nottinghamshire's B&B and guest house sector, our survey findings suggest that many of the county's B&Bs and guest houses are trading at occupancy levels that are well above the national averages (53% for B&Bs and 55% for guest houses in 2015). Some are trading at much lower levels of occupancy however.

Occupancies achieved by inns and pub accommodation establishments in Nottinghamshire are well below the levels achieved in Derbyshire, and are much more variable. 60% of the inns and pub accommodation businesses interviewed in Nottinghamshire achieved an average annual room occupancy of more than 50% (compared to 93% in Derbyshire), and 13% reported an annual room occupancy of under 30% (while no inns did so in Derbyshire).

The performance of small self-catering accommodation businesses in Nottinghamshire was also lower than in Derbyshire. 67% of the self-catering establishments interviewed in Nottinghamshire reported an average annual unit occupancy of over 50% (compared to 78% in Derbyshire). 13% of the self-catering businesses interviewed in Nottinghamshire achieved an annual unit occupancy of below 30% in 2015. None of the Derbyshire self-catering businesses that took part in the survey reported such a low occupancy level.

TABLE 7: OCCUPANCY LEVELS 2015

Type of Accommodation Business	% of Accommodation Businesses Interviewed Reporting This Occupancy Level					
	Above 70%	61-70%	51-60%	41-50%	31-40%	Under 30%
B&Bs and Guest Houses	24	40	8	16	4	8
Inns/ Pub Accommodation	40	13	7	13	13	13
Self-Catering	20	27	20	13	7	13
Caravan and Camping Sites	33	22	22	11	0	0

6.2. Occupancy Trends 2013-2015

Occupancy levels have generally increased or stayed the same for the Nottinghamshire B&Bs and guest houses, and inns and pub accommodation establishments that took part in the survey, although a fifth reported a fall in occupancy over the last three years. The picture is more mixed for self-catering businesses and caravan and camping sites. While occupancy levels have increased, or stayed the same for over half of the self-catering establishments interviewed, they have declined for at least a third. As many caravan and camping sites reported a drop in occupancy as reported an increase.

TABLE 8: OCCUPANCY TRENDS 2013-2015

Type of Accommodation Business	% of Accommodation Businesses Interviewed Reporting a Change in Occupancy in the Last 3 Years			
	An Increase	No Change	A Decrease	Don't Know
B&Bs and Guest Houses	32	40	28	0
Inns/ Pub Accommodation	67	7	20	7
Self-Catering	40	13	33	13
Caravan and Camping Sites	44	0	44	11

6.3. Future Prospects

Looking forward pub accommodation and caravan and camping site operators are the most optimistic about the prospects for growth in their occupancy levels in the next 3 years. A majority of such businesses expect to see no change however. Just over a quarter of the B&Bs and guest houses that were interviewed expect to see an increase in trade, while just under half of them do not anticipate any change. Only 7% of self-catering businesses indicated that they expect to see an improvement in their occupancy levels going forward: most do not expect to see much in the way of change. In overall terms, small accommodation businesses in Nottinghamshire are not as positive about the future as their counterparts in Derbyshire, with fewer operators expecting to see an increase in trade and more anticipating a downturn.

TABLE 9: OCCUPANCY PROSPECTS 2016 -2019

Type of Accommodation Business	% of Accommodation Businesses Interviewed Expecting a Change in Occupancy in the Next 3 Years			
	An Increase	No Change	A Decrease	Don't Know
B&Bs and Guest Houses	28	48	12	12
Inns/ Pub Accommodation	47	27	7	20
Self-Catering	7	53	13	27
Caravan and Camping Sites	44	56	0	0

6.4. Reasons for Changes in Occupancy Performance

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

- A new business, so demand still building;
- Increased bedroom capacity;
- Increased/ improved marketing, particularly in terms of internet marketing and the use of online travel agents such as booking.com and LateRooms;
- Growing demand for short breaks and staycations;
- Upgrading/ an improved product;
- Repeat business;
- Reduced competition/ competitors closed;
- More local events that have generated business.

Reasons cited for decreases in occupancy levels were:

- Taking less business as nearing retirement or due to illness or personal circumstances;
- More competition;
- Disruption to the market in June 2016 as a result of the EU Referendum;
- A drop in contractor business following a power station closure.

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

The survey findings show clear evidence of frequent shortages of all forms of visitor accommodation at weekends (Friday and Saturday nights) between April and October and during the week in the peak summer months (June to early September), especially in terms of B&B/guest house accommodation, pub accommodation and self-catering, but less so in terms of caravanning and camping. Some small accommodation businesses also often trade at full capacity during the winter months, particularly during the week, but many have spare capacity during the winter.

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

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

Type of Accommodation Business	% of Accommodation Businesses Interviewed Trading at Full Capacity				
	Every Weekend	Most Weekends	Some Weekends	Not Many weekends	No Weekends
B&Bs and Guest Houses	32	44	24	0	0
Inns/ Pub Accommodation	20	47	13	13	7
Self-Catering	7	80	7	7	0
Caravan and Camping Sites	33	56	11	0	0

TABLE 11: WEEKEND (FRIDAY/SATURDAY) OCCUPANCY NOVEMBER - MARCH

Type of Accommodation Business	% of Accommodation Businesses Interviewed Trading at Full Capacity				
	Every Weekend	Most Weekends	Some Weekends	Not Many weekends	No Weekends
B&Bs and Guest Houses	8	28	36	24	4
Inns/ Pub Accommodation	0	20	40	27	13
Self-Catering	0	20	47	20	13
Caravan and Camping Sites	0	22	22	11	44

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

Type of Accommodation Business	% of Accommodation Businesses Interviewed Trading at Full Capacity				
	Most of the Time	Quite Often	Occasionally	Not Very Often	Not At All
B&Bs and Guest Houses	28	44	24	4	0
Inns/ Pub Accommodation	47	27	13	13	0
Self-Catering	27	53	7	13	0
Caravan and Camping Sites	0	33	33	22	11

TABLE 14: MIDWEEK OCCUPANCY - WINTER MONTHS

Type of Accommodation Business	% of Accommodation Businesses Interviewed Trading at Full Capacity				
	Most of the Time	Quite Often	Occasionally	Not Very Often	Not At All
B&Bs and Guest Houses	12	40	24	16	8
Inns/ Pub Accommodation	27	13	33	13	13
Self-Catering	0	40	33	13	13
Caravan and Camping Sites	11	0	11	11	56

8. Key Markets and Their Future Growth Potential

8.1. Key Markets for Nottinghamshire Accommodation Businesses

Tables 15-19 overleaf provide a breakdown of the importance of different visitor markets for each type of accommodation in Nottinghamshire. Key conclusions from these tables are as follows:

- People attending weddings and family parties are the key market for B&Bs and guest houses and inns, an important market for self-catering businesses, and a secondary source of business for caravan and camping sites.
- People coming for a particular event or festival are another key market for B&Bs and guest houses and self-catering properties, and a secondary source of trade for inns and caravan and camping sites. Events that generate good business for the county's accommodation industry are the Newark Antiques Fairs, Robin Hood Festival, Lincoln Christmas Market, other events at Newark Showground, Cricket matches at Trent Bridge, Sherwood Pines music concerts, Southwell Folk Festival, Southwell Music Festival, Bramley Apple Festival in Southwell, Earth & Fire Ceramic Fair at Rufford, Newark Blues Festival, events at Clumber Park, Doncaster Races and fishing competitions.
- Business visitors and contactors are a key source of demand for inns. Business visitors are also an important market for B&Bs and guest houses.
- People coming for short breaks are an important market for B&Bs and guest houses, self-catering establishments and caravan and camping sites, but a less important market for many inns and pub accommodation establishments. Short break demand is not as strong in Nottinghamshire as it is in Derbyshire.
- Long holidays are a strong market for self-catering properties and caravan and camping sites.
- Overseas tourists are an important market for self-catering businesses, but of lesser importance for other types of accommodation.

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

Visitor Market	% of Accommodation Businesses Interviewed Indicating This Rating			
	Very Important	Quite Important	Slightly Important	Not At All Important
People coming to stay for a short break	44	48	4	4
People coming for a longer holiday (1 week +)	16	16	20	48
People stopping off en route to other destinations	52	36	8	4
People coming for a particular event or festival	60	32	8	0
Overseas tourists	24	28	36	12
People attending weddings and family parties	72	24	4	0
Business visitors	48	28	16	8
Contractors and workmen	20	32	32	16

TABLE 16: KEY MARKETS FOR INNS & PUB ACCOMMODATION

Visitor Market	% of Accommodation Businesses Interviewed Indicating This Rating			
	Very Important	Quite Important	Slightly Important	Not At All Important
People coming to stay for a short break	33	13	53	0
People coming for a longer holiday (1 week +)	20	0	13	67
People stopping off en route to other destinations	53	27	20	0
People coming for a particular event or festival	27	33	40	0
Overseas tourists	13	20	60	7
People attending weddings and family parties	67	13	20	0
Business visitors	67	13	20	0
Contractors and workmen	67	13	20	0

TABLE 17: KEY MARKETS FOR SELF-CATERING ACCOMMODATION BUSINESSES

Visitor Market	% of Accommodation Businesses Interviewed Indicating This Rating			
	Very Important	Quite Important	Slightly Important	Not At All Important
People coming to stay for a short break	53	33	7	7
People coming for a longer holiday (1 week +)	47	33	20	0
People stopping off en route to other destinations	13	33	13	40
People coming for a particular event or festival	53	20	27	0
Overseas tourists	47	47	7	0
People attending weddings and family parties	40	47	7	7
Business visitors	33	40	13	13
Contractors and workmen	27	20	27	27

TABLE 18: KEY MARKETS FOR TOURING CARAVAN & CAMPING SITES

Visitor Market	% of Accommodation Businesses Interviewed Indicating This Rating			
	Very Important	Quite Important	Slightly Important	Not At All Important
People coming to stay for a short break	78	22	0	0
People coming for a longer holiday (1 week +)	44	22	11	22
People stopping off en route to other destinations	33	56	0	11
People coming for a particular event or festival	22	44	11	22
Overseas tourists	11	22	33	33
People attending weddings and family parties	22	33	44	0
Business visitors	11	0	33	56
Contractors and workmen	11	11	33	44

8.2. Potential Growth Markets for the Future

The markets seen as offering the strongest growth potential for small accommodation businesses in Nottinghamshire are people attending weddings and family parties; event and festival visitors (particularly for inns, self-catering and caravan and camping sites); the short breaks market (again particularly for inns, self-catering and caravan and camping sites); and people stopping off en-route to other destinations (especially for inns and caravan and camping sites). Long holidays are seen as offering growth potential for self-catering and caravan and camping sites. Business visitors and contractors are identified as key growth markets by inns and to a lesser extent B&Bs and guest houses. Self-catering businesses identified overseas tourists as a strong potential growth market.

TABLE 19: GROWTH MARKETS FOR SMALL NOTTINGHAMSHIRE ACCOMMODATION BUSINESSES

Visitor Market	% of Accommodation Businesses Interviewed Identifying This Market as Offering Growth Potential			
	B&Bs/ Guest Houses	Inns/ Pub Accom	Self-Catering Businesses	Touring Caravan & Camping Sites
People coming to stay for a short break	32	53	60	67
People coming for a longer holiday (1 week +)	12	20	53	67
People stopping off en route to other destinations	32	53	13	67
People coming for a particular event or festival	28	53	47	78
Overseas tourists	36	20	73	44
People attending weddings and family parties	48	53	60	78
Business visitors	44	73	27	33
Contractors and workmen	36	73	20	33

9. Where Staying Visitors Go

The most popular places that staying visitors go were identified by the interviewed accommodation businesses as Sherwood Forest, Newark and Lincoln, followed by Nottingham and Southwell. Few staying visitors appear to visit Mansfield, Retford or Worksop.

TABLE 20: WHERE STAYING VISITORS GO

Location	% of Visitors That Go to Each Location			
	Most of Them	Some of Them	A Few of Them	None of Them
Sherwood Forest	31	27	25	16
Nottingham	14	34	31	19
Mansfield	5	8	25	61
Newark	38	25	17	19
Southwell	17	34	23	23
Lincoln	22	38	20	19
Retford	8	17	20	53
Worksop	6	5	25	63

APPENDIX 7

D2N2 VISITOR ACCOMMODATION STRATEGY
SURVEY OF LARGER VISITOR ACCOMMODATION BUSINESSES
KEY FINDINGS

1. Introduction

This appendix summarises the key findings of our survey of larger visitor accommodation businesses across the D2N2 area, listed at the end of the appendix. The findings are reported by type of accommodation, with analysis by location where this has been possible.

2. Hotels

2.1. Derby City Centre

3/4 Star Hotels

Room occupancies are strong in 2016 for Derby city centre 3/4 star hotels, but achieved room rates[1] and revpar[2] figures are significantly below national averages. There is very little difference in achieved room rate performance between the city's 4 star and 3 star hotels.

Table1
DERBY CITY CENTRE 3/4 STAR HOTEL PERFORMANCE 2015-2016

Notes

Standard of Hotel	Average Annual Room Occupancy %		Average Annual Achieved Room Rate £		Average Annual Revpar £	
	2015	2016	2015	2016	2015	2016
UK Provincial 3/4 Star Chain Hotels[1]	**74.9**	**n/a**	**80.51**	**n/a**	**60.33**	**n/a**
Derby City Centre 3/4 Star Hotels[2]	71.0	75.8	55.57	57.88	39.39	43.85

1. Source: Hotstats
2. Source: STR Global + Hotel Solutions Sample: Cathedral Quarter Hotel, Hallmark Derby Midland, Pentahotel Derby, Hallmark Mickleover Court, Holiday Inn Derby Riverlights, Best Western The Stuart, Hallmark Inn Derby, Jurys Inn Derby, Holiday Inn Express Derby Pride Park. The figures quoted are the twelve month average to September 2016.

[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.

3/4 star hotel occupancies have increased substantially in 2016 for a number of reasons. Demand from Rolls Royce has been very strong as a result of a major project that the company is progressing. The Hampton by Hilton and Days Hotel were both closed in the first part of the year for conversion to the Premier Inn Derby Riverlights and Travelodge Derby Cricket Ground. This boosted occupancies for the city's other hotels in the first half of the year. The drop in sterling following the EU Referendum result has boosted Derby's manufacturing sector, which in turn has boosted hotel demand from manufacturing companies in the city. These factors may not be repeated and sustained in 2017, so hotel occupancies may drop back again. Despite the significant improvement in hotel occupancies in 2016, achieved room rates for the city's 3/4 star hotels have only increased marginally.

Midweek occupancies are very high for Derby city centre hotels due to strong corporate demand. The city's 3/4 star hotels consistently fill and turn business away on Tuesday and Wednesday nights. Monday and Thursday occupancies are not as strong however, and room rates are lower on these nights.

Table 2
DERBY CITY CENTRE 3/4 STARHOTELS
WEEKDAY/ WEEKEND OCCUPANCIES – 2016

Average Annual Room Occupancy %			
Mon-Thurs	**Friday**	**Saturday**	**Sunday**
81.1	64.0	82.5	40.2

Source: STR Global + Hotel Solutions

Corporate room rates are relatively low in Derby for two reasons. Firstly, the Derby corporate market is highly competitive, with the city's hotels all competing largely on price to secure a share of available demand. Secondly, it is dominated by a few large companies that are able to command low room rates from the city's hotels because of the volumes of business that they can place with them. A significant proportion of corporate business in Derby is project-related and often long-stay, with corporate guests returning weekly over an extended period.

Derby city centre 3/4 star hotels attract very little residential conference demand.

Midweek leisure demand is minimal in Derby, other than some midweek group tour business that a number of hotels take in the summer to compensate for the downturn in corporate demand at this time of year.

Weekend demand is more challenging for Derby 3/4 star hotels. They achieve high occupancies on Saturday nights but at very low room rates. Friday and Sunday night occupancies and room rates are much lower. Key weekend markets are people attending weddings and family parties in the city or visiting friends and relatives for the weekend. Derby city centre 3/4 star hotels attract some rate-driven weekend break stays, primarily from families visiting Alton Towers and to a lesser extent older couples visiting Chatsworth or the Peak District. Alton Towers business has reduced significantly following the Smiler crash in 2015. Group tours are a further weekend market for Derby hotels. This is low rated business.

The Download Festival and World and British Superbike Championships at Donington Park generate strong demand for hotel accommodation in Derby. Events in the city also generate some bedroom business for the city's hotels.

Budget Hotels

Occupancies are very strong for outer Derby budget hotels. They consistently achieve very high midweek and Saturday night occupancies, and regularly turn away significant levels of business on these nights for much of the year. Friday occupancies are also reasonably strong and Sunday occupancies are fairly good (around 55%). The outer Derby budget hotels primarily serve a very local corporate market, contractor business, and local demand from people visiting friends and relatives or attending weddings and other family occasions.

Table 3
DERBY BUDGET HOTEL PERFORMANCE 2016

Average Annual Room Occupancy %	Average Annual Achieved Room Rate £	Average Annual Revpar £
75.3	48.83	36.76

Source : Hotel Solutions
Sample: Premier Inn Derby Cathedral Quarter, Premier Inn Derby West, Premier Inn Derby East, Premier Inn Derby North West, Premier Inn Derby South, Travelodge Derby Pride Park NB The sample does not include the Premier Inn Derby Riverlights and Travelodge Derby Cricket Ground that opened in 2016

Occupancies are currently lower for Derby city centre budget hotels, where the market is still adjusting to the opening of the Premier Inn Derby Riverlights and Travelodge Derby Cricket Ground in 2016. These hotels are however already filling and turning business away on Tuesday and Wednesday nights, and achieving high Saturday night occupancies. Midweek demand for city centre budget hotels is a mix of corporate and contractor business. In addition to people attending weddings and family parties and visiting friends and relatives, city centre budget hotels also attract some demand from clubbers staying over after a night out in the city centre, and occasional demand from football supporters and people attending cycling events and concerts at Derby Arena.

2.2. Chesterfield

Budget Hotels

Chesterfield budget hotels achieved very high levels of room occupancy in 2016. Occupancies increased in 2015 following the closure of the Chesterfield Hotel. Midweek occupancies are very high as a result of a mix of local corporate and contractor business. The town's budget hotels consistently fill and turn away substantial business on Tuesday and Wednesday nights, frequently also deny business on Monday nights, and occasionally turn business down on Thursday nights. Chesterfield's budget hotels are also achieving high Friday and Saturday night occupancies and regularly deny weekend business, particularly on Saturday nights. Weekend markets are primarily people attending weddings and other family events and people visiting friends and relatives. Town centre budget hotels also attract some demand from people staying over after a night out in the town.

Table 4
CHESTERFIELD BUDGET HOTEL PERFORMANCE 2016

Average Annual Room Occupancy %	Average Annual Achieved Room Rate £	Average Annual Revpar £
83.1	49.86	41.41

Source: Hotel Solutions
Sample: Premier Inn Chesterfield North, Premier Inn Chesterfield West, Ibis Chesterfield North, Travelodge Chesterfield

3/4 Star Hotels

The 3/4 star hotel market does not appear to be as strong in Chesterfield. 3/4 star hotel occupancies are much lower than for budget hotels and achieved room rates appear to be well below the national average. Performance varies between hotels. One trades well during the week, attracting strong corporate demand from Chesterfield and to some extent also Sheffield companies, but struggles to attract business at weekends. Another has focused more on leisure markets and attracts strong weekend and midweek weddings business, some midweek and weekend leisure break business, and an element of midweek corporate trade. Residential conferences are a minor market for both hotels.

There is some evidence of people staying in Chesterfield hotels (both budget and 3/4 star hotels) to visit Chatsworth and the Peak District. This appears to be a minor market for the town's hotels however. The East Midlands Designer Outlet complex at South Normanton is another draw for short break stays in Chesterfield.

2.3. Derbyshire Peak District

3/4 Star Hotels/ Country House Hotels

The hotel market in the Derbyshire Peak District is largely leisure driven. 3/4 star and country house hotels achieve high occupancies and room rates between April and October. They consistently fill and turn business away at weekends during these months and can sometimes also deny midweek business at this time of year. Winter occupancies are lower and demand is more price driven. Weekend demand remains strong but room rates are lower. Midweek occupancies are generally lower in the winter, particularly for more rural hotels that are less able to attract corporate business.

The key market for 3/4 star and country house hotels in the Derbyshire Peak District is people coming for short breaks. Key draws are Chatsworth, Haddon Hall, Bakewell and walking. Events at Chatsworth and other events such as the Eroica Britannia cycling festival, Bakewell Show and Buxton Festival are also key drivers of short break business. Short break guests tend to be emptynester and retired couples, with some younger couples at weekends.

Derbyshire Peak District 3/4 star and country house hotels also attract weddings business both at weekends and increasingly during the week. A number of hotels concentrate on this market at weekends, while others are more focused on weekend break trade. Family celebrations are a further weekend market.

Derbyshire Peak District 3/4 star and country house hotels attract some midweek corporate business. Corporate demand is stronger for hotels that are located closer to Chesterfield and Sheffield.

Few Peak District hotels have good conference facilities or sufficient bedroom availability to attract residential conferences. We believe that there could be scope for hotels with good conferences facilities to develop this market through attracting business from companies located in the major cities and urban areas that surround the Peak District.

Overseas visitors are a further market. Demand is growing from Chinese visitors coming to visit Chatsworth.

Budget Hotels

The new Premier Inn in Matlock that opened in August 2016 has quickly achieved high levels of occupancy and is already consistently filling and turning business away, both at weekends and during the week. The Ashbourne Travelodge is also trading strongly but occupancies are not as strong for the Glossop Travelodge.

2.4. Buxton

3/4 Star Hotels

Buxton 3/4 star hotels are generally achieving high occupancies and room rates. Hotel performance is stronger here than in other parts of the Derbyshire Peak District due to the corporate demand that there is for hotel accommodation in Buxton. The town's hotels attract strong leisure demand. They are usually fully booked at high room rates and consistently turn business away at weekends. Weekend demand is more rate driven in the winter. Weekend breaks are the key market. Key draws are Buxton Opera House, Chatsworth and the surrounding parts of the Peak District. Another weekend market is family celebrations. Buxton 3/4 star hotels also attract strong midweek break business between April and October and achieve high midweek occupancies and room rates during these months. Midweek break business is more offer driven in the winter. Leisure break guests tend to be emptynesters and retired couples. Weekend break guests can be a little younger. Buxton hotels also attract some overseas tourists. Coach breaks are a key market for The Palace Hotel. There is clearly a shortage of hotel accommodation in Buxton at weekends and during the week in the summer, particularly for the Buxton Festival. The Gilbert & Sullivan Festival used to be a key driver of business for the town's hotels in August, before it relocated to Harrogate. Buxton hotels have not yet fully replaced this lost business.

Buxton 3/4 star hotels also attract good corporate demand from Buxton and High Peak companies. They attract some residential conference business, but this is not a key market for most hotels. The Hillhead quarry exhibition generates significant demand for hotel accommodation in Buxton when it is held in June.

Budget Hotels

The new Premier Inn that opened in Buxton in March 2016 has quickly established itself in the marketplace. It is already achieving high occupancies and consistently filling and turning business away.

2.5. Amber Valley

Budget hotels in Ripley and Alfreton are trading at very high levels of occupancy (80%+). They are achieving high midweek and Friday and Saturday occupancies, and consistently filling and turning business away throughout the year.

2.6. Nottingham City Centre

3/4 Star Hotels

Room occupancies are currently strong for Nottingham city centre 3/4 star hotels, and broadly in line with the national average. Achieved room rates and revpar figures are significantly below national averages however. There is a more significant differential in achieved room rate performance between the city's 4 star and 3 star hotels than there is in Derby.

Table 5
NOTTINGHAM CITY CENTRE 3/4 STAR HOTEL PERFORMANCE 2015-2016

Standard of Hotel	Average Annual Room Occupancy %		Average Annual Achieved Room Rate £		Average Annual Revpar £	
	2015	2016	2015	2016	2015	2016
UK Provincial 3/4 Star Chain Hotels[1]	**74.9**	**n/a**	**80.51**	**n/a**	**60.33**	**n/a**
Nottingham City Centre 3/4 Star Hotels[2]	74.5	74.4	60.32	62.16	44.92	46.27
Nottingham City Centre 4 star Hotels[3]	75.1	75.0	66.95	69.06	50.27	51.80
Nottingham City Centre 3 star Hotels[4]	73.9	73.9	54.29	55.49	40.12	41.01

Notes
1. Source: Hotstats
2. Source: STR Global + Hotel Solutions Sample: Hilton Nottingham, Crowne Plaza Nottingham, Park Plaza Nottingham, St James Hotel, Lace Market Hotel, Ramada Nottingham, Jurys Inn Nottingham, Park Inn by Radisson Nottingham, Best Western Westminster Hotel, Holiday Inn Nottingham
3. Source: Hotel Solutions
4. Source: STR Global

Midweek occupancies are currently strong for Nottingham city centre 3/4 star hotels. All hotels consistently fill and turn business away on Tuesday and Wednesday nights, and some also frequently decline business on Monday nights. Thursday occupancies are not as strong however.

Table 6
NOTTINGHAM CITY CENTRE 3/4 STARHOTELS
WEEKDAY/ WEEKEND OCCUPANCIES – 2016

Standard of Hotel	Average Annual Room Occupancy %			
	Mon-Thurs	Friday	Saturday	Sunday
Nottingham City Centre 3/4 Star Hotels	79.9	71.4	91.4	40.5
Nottingham City Centre 4 star Hotels	82.2	72.0	95.6	39.3
Nottingham City Centre 3 star Hotels	78.3	70.9	88.5	41.3

Source: STR Global + Hotel Solutions

Corporate demand from Nottingham companies is the key midweek market for city centre hotels. Corporate rates are relatively low in Nottingham for two key reasons. The corporate market is very competitive, with all of the city's hotels competing primarily on price for a share of demand. The Nottingham corporate market is also dominated by a small number of very large companies that are able to command low room rates from the city's hotels because of the volumes of business that they are placing with them.

Residential conferences are a minor market for most city centre 3/4 star hotels. This is a stronger market for the Crowne Plaza, which has good conference facilities. The Nottingham Conference Centre generates some midweek business for surrounding hotels.

Nottingham 3/4 star hotels attract some midweek leisure break and group tour business in the summer months, when corporate demand reduces. This tends to be very low-rated business. Coach breaks are a key market for the Britannia Nottingham Hotel. University graduations are a further source of midweek business in the summer.

Saturday occupancies and room rates are high. City centre 3/4star hotels generally fill and turn business away on Saturday nights for much of the year. Friday occupancies are not as strong and Sunday occupancies are low. Friday and Sunday room rates are low.

Weekend demand is primarily single night stays from event visitors coming to Nottingham for concerts, theatre shows and sporting events (cricket, rowing, football, tennis, archery, ice hockey and triathlon). People staying over after a night out in the city and stag and hen parties are key weekend markets for 3 star hotels. Nottingham city centre 3/4 star hotels attract some weekend city break stays, with people coming primarily for shopping and the city's nightlife. Nottingham's heritage attractions are also a draw but city break visitors tend not to visit Sherwood Forest and other parts of Nottinghamshire. A number of city centre hotels also attract some weekend weddings business and coach breaks are a key weekend market for some 3 star hotels.

Budget Hotels

Occupancies are very strong for some suburban Nottingham budget hotels. They consistently achieve very high midweek and Saturday night occupancies, and regularly turn away significant levels of business on these nights for much of the year. Friday occupancies are also strong and Sunday occupancies are fairly good (around 50-55%). The suburban Nottingham budget hotels primarily serve a very local corporate market, contractor business, local demand from people visiting friends and relatives or attending weddings and other family occasions, and business from major events in the city.

Table 7
NOTTINGHAM CITY CENTRE BUDGET HOTEL PERFORMANCE 2016

Average Annual Room Occupancy %	Average Annual Achieved Room Rate £	Average Annual Revpar £
72.6	51.67	37.51

Source : Hotel Solutions
Sample: Premier Inn Nottingham City Centre (Chapel Bar), Premier Inn Nottingham City Centre (Goldsmith Street), Premier Inn Nottingham Arena, Premier Inn Nottingham Castle Marina, Travelodge Nottingham Central, Ibis Nottingham Centre

Occupancies are not as strong for Nottingham city centre budget hotels. They achieve high occupancies and room rates on Friday and Saturday nights: most city centre budget hotels consistently fill and turn business away on these nights for much of the year. Key weekend markets are clubbers, stag and hen parties, and event visitors coming for sporting events and concerts and events at the Motorpoint Arena. Midweek occupancies are not as strong for city centre budget hotels and midweek room rates are lower. Tuesday and Wednesday occupancies are stronger and hotels sporadically fill and turn business away on these nights. Monday and Thursday occupancies are lower and denials infrequent. Midweek demand is a mix of corporate and contractor business. The midweek budget hotel market in Nottingham city centre is clearly very competitive.

2.7. M1 Corridor J25-27

In overall terms, the 3/4 star hotels in the J25-27 M1 Corridor are trading at relatively low occupancies and achieved room rates, although performance varies according to hotel brand and hotel quality. Some of the hotels here are in need of investment, and not trading as strongly as they might with a better product.

Table 8
M1 CORRIDOR J25-27 3/4 STAR HOTEL PERFORMANCE 2015-2016

Standard of Hotel	Average Annual Room Occupancy %		Average Annual Achieved Room Rate £		Average Annual Revpar £	
	2015	2016	2015	2016	2015	2016
UK Provincial 3/4 Star Chain Hotels[1]	**74.9**	**n/a**	**80.51**	**n/a**	**60.33**	**n/a**
M1 Corridor J25-27 Hotels[2]	69.4	72.3	57.44	60.00	39.88	43.39

Notes
1. Source: Hotstats
2. Source: Hotel Solutions Sample: Novotel Nottingham-Derby, Holiday Inn Nottingham-Derby, Risley Hall Hotel, Nottingham Belfry, Village Hotel Club Nottingham, Eastwood Hall Hotel, Dakota Nottingham

Midweek occupancies are generally strong, particularly on Tuesday and Wednesday nights, when hotels will often fill and turn business away. Monday and Thursday night occupancies are lower for some hotels, but others also trade well on these nights. Hotels are typically serving corporate demand from a local business park. They also pick up overspill corporate business from Nottingham, Derby and the East Midlands Airport, and transient corporate demand from the M1. Some hotels here also attract residential conferences. This is the main source of business for one hotel. Residential conference demand is a mix of business from local companies and footloose business that is attracted because of the central location of hotels and their ease of access from the M1.

Saturday occupancies are generally strong but room rates are low. Friday and Sunday occupancies are low and business on these nights is very price driven. Weekend markets are group tours and offer-driven weekend breaks, primarily staying to visit Alton Towers, the Peak District and Nottingham; overspill business from Nottingham events and the Download Festival at Donington Park; weddings business; some Park & Fly demand related to East Midlands Airport; and demand from people visiting friends and relatives.

2.8. Mansfield/Ashfield A38 Corridor

Hotels in the Mansfield/Ashfield A38 Corridor are currently achieving very high occupancies. Achieved room rates are low overall however, due to the quality of The Derbyshire Hotel and the dominance of budget hotel provision here. Midweek occupancies are very strong. Hotels are consistently filling and turning away significant business on Tuesday and Wednesday nights, frequently on Monday nights, and often on Thursday nights. Midweek demand is a mix of corporate business from the business parks in the A38 corridor and contactor demand.

Table 9
MANSFIELD/ ASHFIELD A38 CORRIDOR HOTEL PERFORMANCE 2016

Average Annual Room Occupancy %	Average Annual Achieved Room Rate £	Average Annual Revpar £
80.9	53.55	43.32

Source: Hotel Solutions
Sample: The Derbyshire, Premier Inn Mansfield, Travelodge Mansfield

Saturday occupancies are high, with hotels in the A38 corridor generally filling and turning business away on Saturday nights between April and October. Friday occupancies are also strong. Key weekend markets are people coming for weddings and family parties and people visiting friends and relatives in the local area. Other weekend markets are visiting sport teams, pre-visit stays for people taking a break at the Center Parcs Sherwood Forest holiday village, and hospital visitors. One hotel is successfully targeting weekend break business through online travel agents and deals sites and take some weekend group tours. Key selling points are Chatsworth, the Peak District and the East Midlands Designer Outlet.

2.9. North Nottinghamshire (Worksop/Retford)

3/4 star hotels in North Nottinghamshire are trading strongly during the week, catering for local corporate demand. Hotels are generally filling and turning business away on Tuesday and Wednesday nights, and often also on Monday nights. Thursday occupancies are lower. Some local companies that responded to a straw poll survey of North Notts Envoys that was undertaken alongside our research indicated frequent difficulties in securing the hotel bedrooms that they need in the area.

Table 10
NORTH NOTTINGHAMSHIRE 3/4 STAR HOTEL PERFORMANCE 2015-2016

Standard of Hotel	Average Annual Room Occupancy %		Average Annual Achieved Room Rate £		Average Annual Revpar £	
	2015	2016	2015	2016	2015	2016
UK Provincial 3/4 Star Chain Hotels[1]	**74.9**	**n/a**	**80.51**	**n/a**	**60.33**	**n/a**
North Nottinghamshire 3/4 Star Hotels	66.2	70.2	65.92	68.43	43.66	48.05

Notes
1. Source: Hotstats
2. Source: Hotel Solutions Sample: Best Western West Retford Hotel, Ye Olde Bell, Clumber Park Hotel

Weekend demand is not as strong for North Nottinghamshire 3/4 star hotels. Saturday occupancies are generally high as a result of weddings business. Friday and Sunday occupancies are generally lower, although one hotel achieves high Friday occupancies during the weddings season between April and October. Spa breaks are a good weekend market for one hotel. Weekend leisure break business is otherwise minimal. One hotel takes weekend coach tour groups to help boost Friday and Sunday occupancies. This is very low-rated business. Key selling points for tours are York, Lincoln, Lincoln Christmas Market and Chatsworth. In terms of other events, Doncaster Races, the Osberton Horse Trials and events at Clumber Park generate weekend business for North Nottinghamshire Hotels.

The Worksop Travelodge is trading at high levels of occupancy.

2.10. Newark & Sherwood

There is strong demand for budget hotel accommodation in Newark and evidence of frequent shortages of this type of hotel accommodation in the town. 3 star hotels do not appear to be performing as well however. The town's hotel market appears to have declined in the last 2 years, with the closure of the Flowserve plant at Balderton and the loss of a number of major events at Newark Showground. Midweek demand is a mix of local corporate and contractor business. The six antiques fairs at Newark Showground also generate good midweek business for the town's hotels. People attending weddings and family parties are the key weekend market for Newark's hotels. Events and festivals in the town and some events at Newark Showground also generate weekend business. People staying overnight before a break at the Center Parcs Sherwood Forest holiday village are a further market. Newark's hotels do not appear to attract leisure break business.

There is some local corporate demand for hotel accommodation in Southwell. Wedding parties are the key source of weekend business here. A few fixtures at Southwell Racecourse also generate some hotel stays and there is some demand for midweek and weekend leisure breaks, with Southwell Minster a key draw.

2.11. Rushcliffe

The small hotels in Ruddington and Bingham cater for a local corporate market during the week and weekend demand from wedding parties and people visiting friends and relatives. Rowing, water sports and triathlon events at Holme Pierrepont, cricket matches at Trent Bridge, and major concerts and events at the Motorpoint Arena also generate weekend demand for some hotels. While we did not interview any of the remaining hotels in West Bridgford, we would expect them to be catering for similar markets.

2.12. Golf Hotels

Golf hotels in the D2N2 area are currently trading well, particularly in terms of achieved room rates, which are more in line with the national 3/4 star chain hotel averages and higher than the rates achieved by other 3/4 star hotels in the D2N2 area. Weekend demand is strong. Golf hotels consistently fill and turn business away on Saturday nights as a result of a combination of weddings business and golf break demand. Friday occupancies are also strong and golf hotels can achieve high Sunday night occupancies through discounted Sunday driver golf break packages and golf group business. Weddings are a key market for golf hotels and can block out smaller hotels for weekend golf break business. Football and cricket teams are a further weekend market for one golf hotel.

Midweek occupancies are not as high as for city centre hotels. Tuesday and Wednesday occupancies are stronger and hotels generally fill on these nights and turn business away during peak corporate months. Monday and Thursday night occupancies are lower. Golf hotels pick up some local corporate business and larger golf hotels with good conference facilities trade well in the residential conference market. This market has generally reduced in recent years as companies have developed their own in-house meeting and training facilities, although there have been some signs of recovery in the past two years. Golf hotels also attract some midweek golf break and golf group business and some midweek weddings.

2.13. Adult Only Hotels

We did not interview Warner Leisure Hotels' Thoresby Hall Hotel. We have however seen reports that the company is currently running at a 95% occupancy, catering for the over 50s adult only leisure breaks market.

3. Holiday Cottage Complexes (Derbyshire Peak District)

The holiday cottage complexes that we spoke to in the Derbyshire Peak District are all trading strongly at weekends, during the week between April and September, and over the Christmas and New Year period. They are consistently fully booked and frequently turn business away at these times. Midweek demand and prices are lower in the shoulder season and winter months. Demand is predominantly for short breaks, and this market has grown. There is also demand for full week stays during school holiday periods. Holiday cottage complexes attract strong demand from family and friend get togethers that will take a number, and often all, of a complex's cottages. Holiday cottage complexes that can provide function and meeting spaces are also attracting demand for weddings and corporate events. Higher quality complexes are generally achieving the highest levels of occupancy and price. There is a niche market for purpose-designed wheelchair accessible self-catering properties.

4. Holiday Lodge Parks

Our survey of D2N2 holiday lodge parks and smaller holiday lodge developments shows strong demand for this type of accommodation in the Derbyshire Peak District and Sherwood Forest, both for rental and ownership, and a smaller but growing market in The National Forest (South Derbyshire). Existing holiday lodge parks are achieving high levels of occupancy (75-92% per year) for rental lodges. They are frequently fully booked and turn business away at weekends and during school holiday periods. Demand is predominantly for short breaks both at weekends and during the week. There is a strong local market for weekend lodge breaks. There is also some demand for full week stays during school holiday periods, and this market is growing. Key markets are families, and couples for romantic breaks. Holiday lodge complexes in the area also attract strong demand for family and friend get togethers and celebrations because of the area's central location in the country. They also attract some demand from wedding parties and overseas tourists. The appeal of a holiday lodge break is about getting away from it all for a relaxing break in the countryside. Customers are typically interested in outdoor activities such as walking, cycling and mountain biking. They will also visit local attractions. Lodge breaks are particularly popular for dog owners. The strongest demand is for lodges with hot tubs (which are particularly popular out of season and in the winter) and high-end lodges. The increasing supply of holiday lodges in the D2N2 area has increased price competition, suggesting a need to be cautious about encouraging too much additional supply.

5. Center Parcs Sherwood Forest Holiday Village

Center Parcs' Annual Review 2015/16 reports that the company's holiday villages achieved an annual occupancy of 97.7% and an average daily rate of £167.31 (net of VAT). 96% of customers rated their break as excellent or good.

6. Caravan & Camping Sites

Demand for caravanning and camping is strong but highly seasonal. Large caravan and camping sites across Derbyshire and Nottinghamshire trade strongly during the summer. They are generally full and turn business away at weekends between June and September and consistently fill and deny business during school holiday periods. Midweek pitch occupancies are lower (typically around 40-50%) and more variable however. Weekend demand remains strong in the shoulder season months and sites can fill and turn business away if the weekend weather is good. Midweek pitch occupancies are low in the shoulder season however. There is still some weekend demand from caravanners and motorhomers in the winter for hard standing pitches, but midweek demand is minimal. Some sites attract strong demand over the Christmas and New Year period. Sites with camping pods attract strong weekend demand for this type of accommodation throughout the year. Demand for camping is much more seasonal and restricted primarily to the summer months.

Demand for caravanning and camping is mainly for short breaks. Weekend demand is very local, predominantly coming from Nottingham, Sheffield, Doncaster, Derby, Lincoln and Stoke-on-Trent and their surrounding areas. A lot of weekend customers are regulars that frequently visit caravan and camping sites. Demand is often very last minute and weather dependant. Families are the key market at weekends and during school holidays. Retired couples are the main market during the week. A lot of customers are dog owners. Caravan and camping sites also attract some demand for longer holidays and some demand from UK and overseas tourers that will stop off en-route to other destinations. Key overseas customer nationalities are the Dutch, Germans, Italians, French, Spanish, Swiss, Danes and Australians. Caravan and camping sites across the two counties also attract good demand for family and friend get togethers and celebrations.

Key motivations for caravanning and camping stays are to do with peace and quiet and relaxation. Many customers will spend most of their stay on site. They are also likely to take part in outdoor activities such as walking, cycling and fishing. They may also visit local attractions, events and market towns, but are less inclined to venture into Nottingham and Derby. Families staying at some sites in the Derbyshire Peak District come mainly to visit Alton Towers, although this demand has reduced in 2015 and 2016 following the Smiler crash.

Many caravan and camping sites operators reported increasing demand as a result of growing caravan and motorhome ownership, the increased popularity of camping, the growth of the staycation and short break markets, and increasing demand from the over 50s. Many sites have also seen a lengthening of the season as a result of the improving quality of caravans and motorhomes, and/or as a result of their development of more hard standing pitches, heated toilet and shower blocks, and the introduction of camping pods. Customers are becoming increasingly demanding. They all now require electric hook up points and Wi-Fi, and are increasingly looking for hard standing pitches, even for camping (so that they can park their cars alongside their tents).

There is strong demand for seasonal tourer pitches (where touring caravan owners leave their caravan on a site for the season to use as and when they want to). Sites that offer such pitches are generally fully booked and some have waiting lists for seasonal pitches.

Sites that offer static caravan pitches achieve high demand for caravan holiday home ownership. They usually have a very low turnover of owners, and do not generally have any problems in filling any plots that become vacant. Caravan holiday home sales reduced during the recession but have recovered strongly in 2015 and 2016.

Demand for caravanning and camping is strongest in the Derbyshire Peak District, Sherwood Forest and around Newark. Sites in the National Forest (South Derbyshire) generally trade at lower levels of pitch occupancy.

7. Camping Pods

All of the holiday parks and caravan and camping sites that we spoke to that have camping pods reported very strong weekend and summer demand for this type of accommodation. Their pods consistently sell out at weekends throughout the year, and achieve high midweek occupancies in the summer. Demand is generally from young couples and families. Weekend demand is relatively local.

8. Youth Hostels and Outdoor Education Centres

Youth hostels and outdoor education centres in the Derbyshire Peak District attract strong midweek demand from primary and secondary schools between March and mid-July and in September and October. Most centres are fully booked with school groups from surrounding counties at these times.

Hostels and centres also attract strong weekend demand from a variety of different types of group including youth groups, scout and guide groups, National Citizen Service (NCS) groups, family and friend get togethers and celebrations (a strong market for exclusive hire), walking groups, cycling groups, fell runners, stag and hen parties and weddings. They also attract weekend demand from individual families, couples and singles. Most hostels and centres are fully booked at weekends between April and September and attract strong weekend demand throughout the winter from October to March.

Midweek periods during the winter are much quieter. Hostels and outdoor education centres attract some demand from youth groups at these times, and some better quality hostels have attracted corporate groups.

Youth hostels and outdoor education centres in the Derbyshire Peak District are generally seeing improvements in their occupancy levels as a result of better marketing and investment delivering improved guest satisfaction.

LARGER ACCOMMODATION BUSINESSES INTERVIEWED

Accommodation Business	Location	Face-to-Face/ Telephone
Hotels		
Breadsall Priory Marriott Hotel & Country Club	Breadsall	F
Morley Hayes	Morley	T
Cathedral Quarter Hotel	Derby	F
Holiday Inn Derby Riverlights	Derby	F
Pentahotel Derby	Derby	T
Holiday Inn Express Derby Pride Park	Derby	T
Premier Inn Derby East	Derby	F
Casa Hotel	Chesterfield	T
Ringwood Hall Hotel	Chesterfield	F
Ibis Chesterfield Centre	Chesterfield	T
Premier Inn Chesterfield North	Chesterfield	T
Ibis Chesterfield North	Balborough	F
Risley Hall Hotel	Risley	F
Holiday Inn Nottingham Derby	Sandiacre	F
Novotel Nottingham Derby	Long Eaton	F
Peak Edge Hotel	Ashover	F
The Cavendish Hotel	Baslow	F
New Bath Hotel & Spa	Matlock Bath	F
Hassop Hall Hotel	Hassop	T
Rutland Arms Hotel	Bakewell	F
Monsal Head Hotel	Monsal Head	T
Riverside House Hotel	Ashford-in-the-Water	T
Best Western Lee Wood Hotel	Buxton	F
The Old Hall Hotel	Buxton	F
Portland Hotel	Buxton	F
Crowne Plaza Nottingham	Nottingham	F
Hilton Nottingham	Nottingham	F
Park Plaza Nottingham	Nottingham	F
Lace Market Hotel	Nottingham	F
St James Hotel	Nottingham	F
Premier Inn Nottingham Centre (Chapel Bar)	Nottingham	T
Ibis Nottingham Centre	Nottingham	T
The Nottingham Belfry	Nuthall	T
Eastwood Hall	Eastwood	F
Village Hotel Club Nottingham	Chilwell	F
Dakota Nottingham	Hucknall	F
Best Wester Plus West Retford Hotel	Retford	F
Ye Olde Bell	Barnby Moor	F
Clumber Park Hotel	Worksop	F
Saracen's Head Hotel	Southwell	F
Millgate House Hotel	Newark	T
Premier Inn Newark	Newark	F
The Derbyshire	South Normanton	F
Premier Inn Mansfield	South Normanton	T

Travelodge Mansfield	Sutton-in-Ashfield	F
Mansfield Manor	Mansfield	T
Bingham Townhouse	Bingham	F
The Residence at The Nottinghamshire	Cotgrave	F
Country Cottage Hotel	Ruddington	F
Serviced Apartments		
Premier Suites	Nottingham	F
Holiday Cottage Complexes/ Operators/ Agencies		
Gainsborough Retreats	Carsington	F
Derbyshire Country House	Alport	F
Derbyshire Country Cottages		F
Hoe Grange Holidays	Brassington	F
Dunham House/ Diamond House	North Nottinghamshire	F
Holiday Lodge Parks		
Pinelodge Holidays	Two Dales	T
Beechwood Park	Elvaston	T
Forest Lodges at Rosliston Forest Centre	Rosliston	F
Mercia Marina	Wilmington	F
Forest Holidays Sherwood Forest	Sherwood Pines	F
Sherwood Hideaway	Thoresby	F
Holiday Parks		
Greenhills Holiday Park	Bakewell	F
Longnor Wood Holiday Park	Longnor	T
Callow Top Holiday Park	Ashbourne	F
Ashbourne Heights	Ashbourne	F
Rivendale Caravan & leisure Park	Alsop-en-le-Dale	F
Shardlow Marina	Shardlow	T
Touring Caravan and Camping Sites		
Lickpenny Caravan Park	Tansley	F
Laneside Caravan Park	Hope	T
Golden Valley Caravan & Camping Park	Ripley	T
Beehive Farm Woodland Lakes	Rosliston	T
Clumber Park Caravan Club Site	Clumber Park	F
Clumber Park Campsite	Clumber Park	F
Sherwood Forest Holiday Park	Kings Clipstone	F
Smeaton's Lakes	Newark	F
Teversal Camping & Caravanning Club Site	Teversal	F
Wedding Venues with Accommodation		
Hodsock Priory	Hodsock	F
Group & Youth Accommodation		
Thornbridge Outdoors	Great Longstone	F
Mount Cook Adventure Centre	Middleton	F
YHA Regional Manager		F

APPENDIX 8

D2N2 – KEY DRIVERS OF GROWTH IN DEMAND FOR HOTEL & VISITOR ACCOMMODATION

Nottingham

The Nottingham Growth Plan – launched in July 2012 – sets out a 10 year economic strategy for Nottingham that builds on the city's competitive advantage in the life sciences, digital content and cleantech sectors. The strategy has three key strands (fostering enterprise, supporting a high quality workforce, and developing 21st century infrastructure) and, within these strands, 12 programme areas and 42 individual projects. The Plan is underpinned by a £60 million City Deal, designed to transform Nottingham's economy and create wealth right across its communities. It sets out a series of measures for driving the city's economy forward, utilising Nottingham's strengths, including its world-renowned universities, central and cost-effective location, good transport and quality of life.

Four main areas of focus for regeneration have been identified within the City, each with key schemes that will make major contributions to delivering this growth (see figure overleaf). These are:

- **City Centre North** – an established area with civic, university and shopping uses; significant recent investment in Nottingham Trent University student union, student flats, event space and offices; and a £40m up-grade of the Victoria Centre. Key projects include:
    - A £110m scheme to redevelop the Guildhall as a luxury hotel and surrounding areas for grade A office space and student accommodation;
    - The Royal Transformation Project, a £3m investment in the Royal Theatre and Concert Hall to extend its opening and uses.

- **Southern Gateway** – transformation of the southern approach to the city, to deliver a thriving retail, leisure and education destination underpinned by a new business district and excellent transport links, including the creation of a £60m world class transport hub at the station. Key projects include:

    - The £150m redevelopment of the Broadmarsh Shopping Centre to greatly expand Nottingham's retail offer and assist the development of the visitor economy;
    - A major £24m refurbishment and improvement programme at Nottingham Castle to create a world class tourism attraction, part funded by HLF;
    - A landmark mixed use development scheme at Unity Square, with 30,000 sqm of Grade A office space and plans for a hotel in the heart of the emerging business district, in a prime gateway position facing the station entrance.

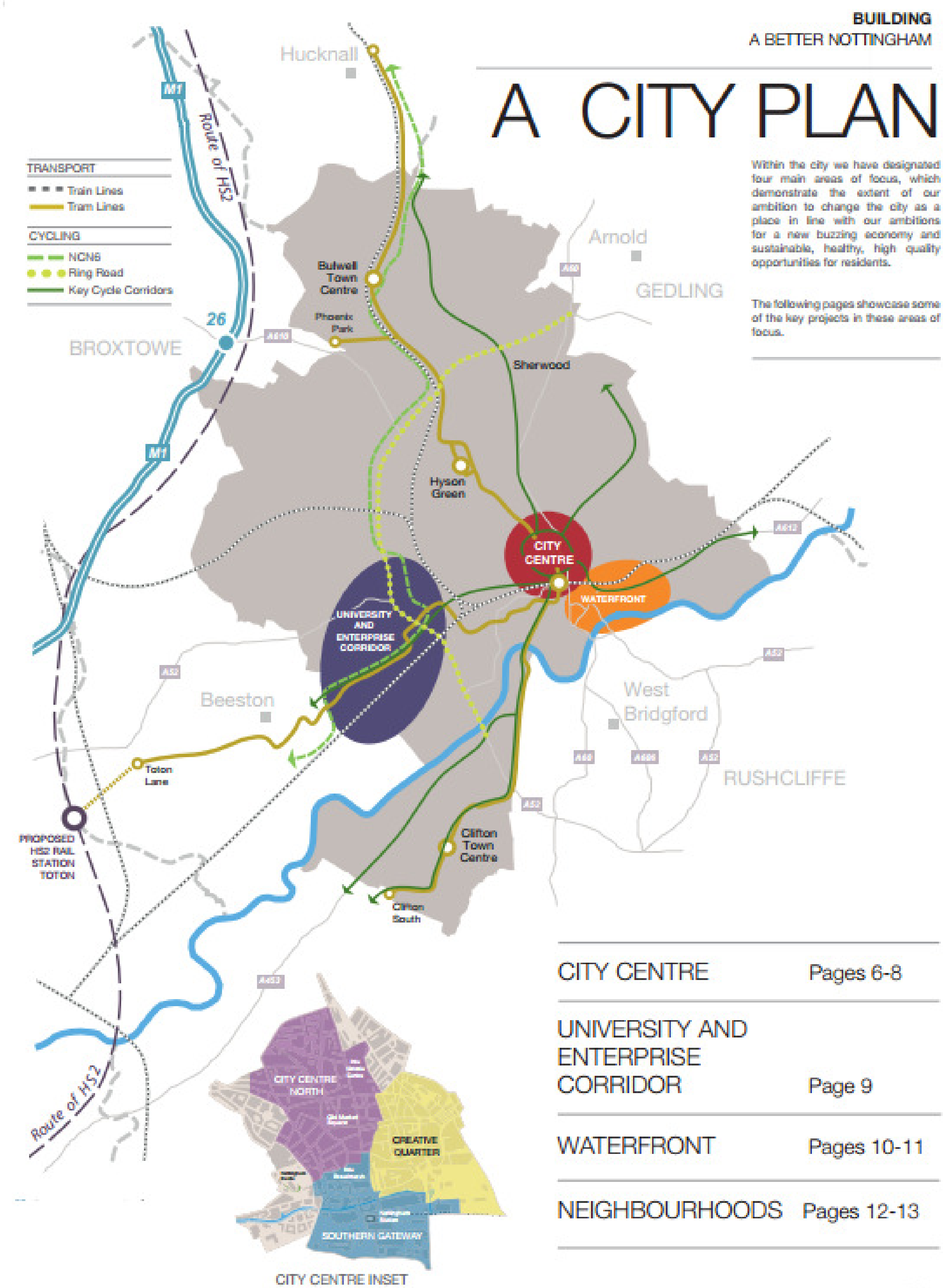
- **Creative Quarter** - this has been the flagship Nottingham City Deal project, supporting D2N2's priority sectors of creative industries and life sciences and driving the new Nottingham economy with dynamic businesses, creative outlets for music and art, and a variety of cafes and restaurants. Significant recent investment includes the establishment of the Antenna Media Centre, the £2.5m National Videogame Arcade and research hub, and BioCity. Key projects include:

    - The proposed 1500 capacity convention centre that builds on the success and linkage to the Nottingham Ice Centre that is an established sports and concert destination. The scheme involves the development of a 7 acre site adjacent to the Ice Centre to provide a world class venue for national and international events and conferences, incorporating a 5 star hotel, apartments and associated car parking;
    - The expansion of Bio-City, the UK's largest bio-science innovation and incubation cluster, with a new 50,000 sqft building for bio-science companies.

- **The Waterfront** – one of the largest development areas in the city, split between a southern area for housing, a central area for '@energy City', and a northern mixed use area linking to the Creative Quarter. The key project of interest to creating demand for hotels here is the development of the **Boots Island site**, a 10ha strategic development site close to the city centre, previously occupied by Boots. A mixed use development is proposed here, including bio-science expansion, offices and residential.

Beyond the City Centre, key developments include:

- **The University and Enterprise Corridor** – Nottingham's centre for life sciences and innovative industries, tied in with the University of Nottingham and Queens Medical Centre as well as Walgreens Boots Alliance. This area will be boosted by improved connectivity via tram, and in time High Speed Rail. The development of four key sites within the Enterprise Zone is identified as vital to support technology-intensive companies that will define D2N2's international reputation; support will open up these sites for development, and also make a case for the extension of the existing D2N2 Enterprise Zone focused around Nottingham University. Key projects include:
    - **MediCity** on the Boots Campus, refurbishing the Boots building as a health and beauty innovation centre; new advanced technology centre for Nottingham Trent University at the Boots site for global healthcare product development ; Confetti Digital and Creative Training Centre.
    - **Nottingham Science Park**, providing 35,000 sqm of business accommodation, initial occupiers specializing in University based industries with an emphasis on clean technologies. Commercial space for life science businesses and bio-med sectors is also available here.
    - **Imperial Tobacco** – a 45ha site vacant in 2017 with potential to expand the Boots Campus.
    - **University of Nottingham Innovation Park**, a major extension to the University of Nottingham campus, with state of the art buildings providing space for cutting edge businesses and research.


BUILDING
A BETTER NOTTINGHAM
A CITY PLAN
Within the city we have designated four main areas of focus, which demonstrate the extent of our ambition to change the city as a place in line with our ambitions for a new buzzing economy and sustainable, healthy, high quality opportunities for residents.
The following pages showcase some of the key projects in these areas of focus.
TRANSPORT
Train Lines
Tram Lines
CYCLING
NCN6
Ring Road
Key Cycle Corridors
Hucknall
Arnold
GEDLING
BROXTOWE
M1
Route of HS2
26
Bulwell Town Centre
Phoenix Park
Sherwood
Hyson Green
CITY CENTRE
WATERFRONT
UNIVERSITY AND ENTERPRISE CORRIDOR
Beeston
West Bridgford
RUSHCLIFFE
Toton Lane
PROPOSED HS2 RAIL STATION TOTON
Clifton Town Centre
Clifton South
CITY CENTRE NORTH
CREATIVE QUARTER
SOUTHERN GATEWAY
CITY CENTRE INSET
CITY CENTRE Pages 6-8
UNIVERSITY AND ENTERPRISE CORRIDOR Page 9
WATERFRONT Pages 10-11
NEIGHBOURHOODS Pages 12-13

- Further development at **NG2**, an established modern business park served by the expanding tram network, where key businesses such as Experian and Speedo are already based. The final phase of development here is proposed to include further offices and potentially a hotel.

- **Beeston Town Centre** – there are proposals for Phase 2 of the Beeston Town Centre redevelopment, following the completion of the tram works which connects Beeston to the city and provides access to serve the neighbouring University campus and the Boots headquarters. The vision is for a mixed use cinema-led night-time economy development, which could include a hotel.

- **HS2 Rail Station at Toton** – Toton has been confirmed as the proposed location for the East Midlands Hub, which will serve both high speed rail services and local/regional rail services, and be connected to the tram system. The site is located close to junction 25 of the M1, between Nottingham and Derby. A 5 year construction programme is proposed, with services expected to run from 2032.

- **East Midlands Gateway** – this is a proposed Strategic Rail Freight Interchange next to East Midlands Airport that will accommodate up to 6 million sqft of new distribution and storage buildings. The rail freight terminal will have a direct connection with the National Freight Network.

Derby

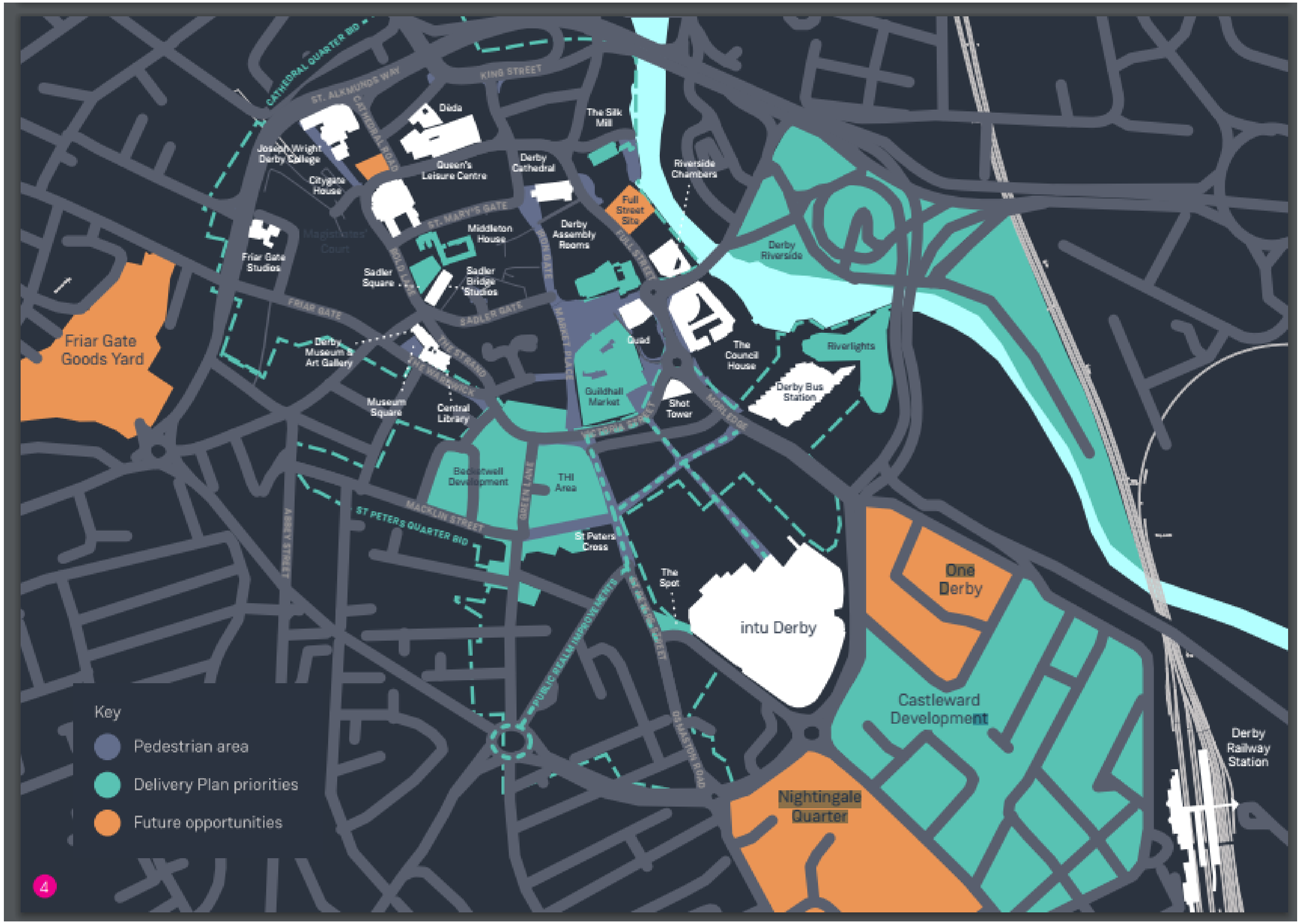
Derby's 15-year Masterplan, launched in July 2016, looks to create 1900 new homes, 4000 jobs and attract £3.5bn of investment by 2030. It positions Derby as the UK's number 1 hi-tech city, at the heart of the country's aerospace, rail and automotive sectors, operating in global markets, with an expanding network of advanced technology businesses and professional services and an emerging creative sector. In terms of leisure appeal, its offer centres around the Derwent Valley Mills World Heritage Site and an active cultural and events programme. The Masterplan sets out a vision and ambitions for the city centre – to create a cultural, retail and leisure destination with a successful central business district and a thriving market for city centre living – with key regeneration opportunity identified, and priority projects for delivery within the next 5 years.

Below we detail some of these key schemes, with particular focus on those that have the ability to drive business and leisure tourism demand for hotels and other forms of visitor accommodation in and around the city. The plan overleaf shows the location of the main sites.

- **Assembly Rooms Performance Venue** - the key focus of the Delivery Plan for the next 5 years is the 3000-capacity performance and events venue in the city centre, on the site of the Assembly Rooms that were destroyed by fire. This will capitalize on the identified growth opportunity for the evening and night time economy. The venue will lead the economic regeneration of the city and is seen as the catalyst for further investment in the retail, leisure and office sectors. Initial feasibility work and business case preparation is underway, the options being a concert and comedy venue costing £20m, or a theatre and musical venue, at a cost of £50m. The value of the total scheme is £115m. An up-scale hotel is being considered as an option for the wider site.

- Other key city centre schemes likely to come forward in the early stages of the Masterplan delivery include **Becketwell** and **Riverlights Two**, both for retail, leisure and residential, plus the next phase of **Castleward**, a 38-acre site close to the station that will create an urban village that will on completion have 800 homes, a school and retail.

DERBY CITY CENTRE MASTERPLAN – KEY SITES



- **World Heritage Site regeneration** is also up for early delivery, including the renovation of the Silk Mill to create a new national museum and visitor attraction, the Museum of Making, and small start up workshops. The scheme has secured funding from the Heritage Lottery Fund, Arts Council and Local Growth Fund.

- **Cultural Events Programme** – an active events programme has been key to the growth of Derby's cultural offer. As part of the Delivery Plan, Derby Live will lead a partnership initiative to grow a sustainable, diverse and vibrant programme of events to bring increasing numbers of visitors to the city.

- **ICC Women's Cricket World Cup 2017** – Derby is one of the five host cities for the ICC Women's World Cup 2017 in England and Wales. The city will host eight matches in June and July.

Outside the city centre, business park development is planned which will also have the potential to drive additional corporate demand.

- **Infinity Park, Derby** - a flagship scheme, building on Derby's position as one of the UK's key centres of advanced manufacturing, with a focus on automotive, rail and aerospace industries and their supply chains. Infrastructure works being supported through the Local Growth Fund will accelerate delivery and open up Phase 2 of the Innovation Hub to provide world class innovation employment space, IT, business and technology support to attract suppliers to key businesses such as Rolls Royce, Bombardier and Toyota, and securing £196m of investment in Infinity Park. Hotel uses are planned in as part of the overall scheme.

- **Derby Triangle** – a 50-acre extension of Pride Park being developed by St Modwen that will deliver over 750,000 sq ft of business accommodation in office, warehouse, industrial and leisure space being proposed. It is anticipated 3000 jobs will be created on completion. A start on site is scheduled for Spring 2017.

Derby & Nottingham Metropolitan Strategy 2030

There is an ambition for Derby and Nottingham to work more closely together, recognizing the potential strength of the combined population and resources of the two cities, to establish national presence and international reputation. The shape this closer co-operation might take is still being sketched out, but an initial Metropolitan Strategy Action Plan covering the period 2016-2019 has been produced to begin putting a framework in place. The Metro Strategy ambitions include to promote Derby and Nottingham world-wide to attract new investment, support businesses to innovate, diversify and find new markets, increase productivity and strengthen supply chains, as well as develop talent and improve accessibility.

Nottinghamshire

Business tourism demand drivers:

- **Worksop** - the development of the 55 acre Vesuvius site by Commercial Estates Group for mixed use, employment, retail and leisure uses, together with a further 36.5ha of land earmarked for employment development.
- **Thoresby Colliery** – to be developed by Harworth, with current Masterplanning including a 350 acre country park, a 25 acre business park (250,000 sq ft of employment space), a retirement village and residential development (800 dwellings).
- **Retford –** an outline planning application has been submitted for an 11ha employment site on North Road with office, industrial and distribution uses, alongside 196 houses and a possible hotel and pub restaurant. Icon Aerospace Technology, one of Retford's largest employers has plans for major expansion following its selection for the government's Sharing in Growth programme to help firms to compete for increased aerospace business.
- **Symmetry Park, A1 J34** - db symmetry are to develop a major distribution park on this 48 acre site, which has consent for 721,000 sq ft of employment space.
- **Droversdale –** a scheme by developers Harworth to develop a new community on the 107 acre site of the former Harworth Colliery, with 1,700 new homes and 825,000 sq ft of employment space.

- **Stockwell Gate North, Mansfield** – Mansfield District Council is currently marketing this site in Mansfield town centre for a retail-led mixed-use development that will create a new gateway to the town centre. Its construction will generate contractor demand for hotel accommodation in Mansfield.

- **Mansfield and Ashfield Business Parks –** there are a number of business parks around Mansfield and Ashfield and served by the MARR that are the focus of major development, albeit they are at different stages. These include Ransom Wood Business Park (70 acre office park), Berry Hill (urban extension and hi-tech innovation park), Summit Park (45 acre industrial and logistics park) and Castlewood Business Park (B1, B2, B8 with 820,000 sq ft already built out). A number of these could accommodate a hotel.

- **Newark urban extension and employment site** - the new southern link road being supported through the Local Growth Fund will open up 39ha of land to the south of the town for development for employment and residential uses.

- A series of major **infrastructure works and transport improvements** to un-lock key sites for both business development and major urban extensions, that will also generate contractor demand, including:
  - Newark Southern Link Road
  - Harworth access road
  - A57/A60 junction Worksop
  - A46 corridor projects, Rushcliffe
  - Mansfield urban extension/Sherwood Growth Corridor highway improvements

Leisure tourism demand drivers:

- **A new visitor centre for Sherwood Forest**, to be developed by an RSPB-led consortium that will design and build the new centre and manage it and Sherwood Forest Country Park and National Nature Reserve from 2018. The consortium also includes the Sherwood Forest Trust, Continuum Attractions and Thoresby Estate. The new visitor centre will represent an investment of £5.3m, and will include welcome and orientation spaces, a café, retail outlet, recreational space and cycling hub.

- **Clumber Park Revitalised** – the National Trust has launched a 10-year investment framework for Clumber Park that includes the revitalisation of the Pleasure Grounds; a waterfront playfield and woodland experience; improved signage, orientation and interpretation; and an extended calendar of events and activities.

- **Thoresby Colliery Country Park** – Harworth's plans for Thoresby Colliery include the restoration of the spoil heap to provide a 350 acre country park with a zip wire course, Extreme Segway track, mountain bike trail, cycle hire, abseiling and a viewing platform.

- **Pilgrim Fathers 2020** – the 400th anniversary of the sailing of the Mayflower presents an opportunity to promote the area around Scrooby, Babworth and Sturton–le-Steeple to attract visitors to commemorate the event, which will also be celebrated in the USA and the Netherlands, and raise the profile of this part of Nottinghamshire. Whilst this is a niche offer, it will provide an impetus to develop a wider Christian heritage offer and work with partners to increase capacity and further develop the product.

- **Wedding venue development** – the development of new wedding venues presents an opportunity for hotels and other forms of visitor accommodation in the surrounding area to accommodate demand from wedding guests. An example is Hazel Gap Wedding Barn at Budby, near Newark.

Derbyshire

Business tourism demand drivers:

- **Chesterfield regeneration schemes** – Chesterfield is the focus of a number of major developments that will drive new demand for hotel accommodation. These include Chesterfield Waterside, a high quality mixed use development on 16ha on the edge of the town centre and adjacent to the river and canal. This £340m regeneration scheme will commence with the £75m development of Basin Square, a 55,000 sqm development delivering 310 apartments, 3000 sqm of offices, an 84 bedroom hotel with restaurants uses and associated parking. A second site at Elder Way (now under construction) involves the redevelopment of the former Co-op site in the town centre to deliver a Premier Inn, new restaurant and gym as part of a leisure and eating quarter.

- **Egstow Park –** is a 204 acre brownfield development site (the former Biwater Pipeworks) at Clay Cross in North East Derbyshire. Developer St Modwen is progressing a mixed-use regional regeneration scheme for the site, comprising 980 homes, 270,000 sq ft of employment space that is expected to create 1,000 new jobs, a local centre to include a food store, and possibly a hotel. Marston's is currently on site with the development of a family pub restaurant.

- **Riverside Business Park, Bakewell** – this is a 3 acre brownfield site being developed by Litton Properties for a mixed commercial development incorporating a hotel, to be operated by Premier Inn, with restaurant and leisure. Access and infrastructure works to enable the development are being supported by the Local Growth Fund. The scheme will create 300 jobs.

- **Markham Vale** is a 200-acre employment and distribution park located either side of junction 29a on the M1.

- The regeneration/remediation of the **Coalite site at Bolsover** for commercial business park and housing development, creating 1500 jobs, supported by £7m of funding from Derbyshire County Council and the D2N2 LEP.
- The Growth Strategy for High Peak identified the **A6 Growth Corridor** (Chapel-en-le-Frith, Hayfield, New Mills and Whaley Bridge) as a high growth enterprise corridor for advance manufacturing, bio-pharma, aggregates and logistics industries.

- **Infrastructure programmes** include:

    - New access routes to facilitate development at Ashbourne, Bakewell Riverside, Fairfield Link Buxton
    - Link road/regeneration route, Markham Vale Enterprise Zone
    - Access works, Rolls Royce business and residential development, Hucknall
    - Swadlincote regeneration route - New A511 link route between Swadlincote and Woodville to unlock land at Tollgate Park for commercial and residential development
    - A52 Derby Pride Park junction improvement
    - A61 Chesterfield junction improvement
    - Strategic Flood Defense Scheme along the Derwent.

Leisure tourism demand drivers:

- **Peak Resort**[4] – this is a £400m integrated year round leisure, health, sport and education resort to be developed on the Birchall Estate at Unstone outside Chesterfield. The proposal includes a mixture of accommodation and facilities – a luxury hotel to be developed with US company Grand Heritage, 250 woodland lodges and 'hobbit homes', 600 apartments, a Medi-Spa, a University campus for hospitality, wellness and sport, indoor water sports, adventure and other leisure facilities, 300 acres of parkland with walking and cycling trails. Work is due to start on site in 2017, and on completion should deliver 1300 new jobs.

- **Gulliver's Valley Resort** – Gulliver's Theme Parks is currently progressing plans to develop a new family theme park and resort on the Pit House West site at Rother Valley. The resort will include a range of themed areas and rides, an indoor waterplay zone, a themed hotel, woodland lodges and treehouses, an indoor climbing wall, nature trails, a woodland adventure centre, and education and ecology centre. While it will include on-site accommodation, the scale and profile of the resort will provide opportunities for hotels and other accommodation businesses in Chesterfield, North East Derbyshire and Bolsover to develop family break packages. Full planning permission for the project was granted in October 2016.
- **Buxton Crescent and Thermal Spa** – the £50m redevelopment and restoration of The Crescent and Thermal Spa at Buxton marks a step change for the town and a real opportunity to change its market positioning and put the town back on the national and international map as a leading spa town. The project will create in excess of 140 permanent jobs, 350 construction related jobs and many more permanent jobs indirectly through new spa-related businesses resulting in a boost to the local economy by over £4.5 million. The Crescent and Thermal Spa heritage experience and development of the Pump Room will also provide new indoor attraction for visitors, schools, tour groups and tourists. The 80 bedroom 5 star hotel will take up most of The Crescent and will incorporate the Assembly Rooms and a thermal natural mineral water spa in the Natural Baths. The project will also feature 6 retail units in the front ground floor. The project has been supported by HLF (£23.8m) and D2N2 (£2m).

[4] Source: http://www.chesterfield.co.uk/developments/peak-resort/

- **Peak cycling initiatives** – cycling is an important attractor for the Peak District, and a series of initiatives are set to boost the potential of cycling's associated markets. These include the development and promotion of new routes, further development of cycling events such as the Peak Cycle Tour and Eroica Britannia, and support for cyclist welcome training and facilities, which combined have the potential to develop the area as a world class destination for cycling.

- **RHS at Chatsworth** – the Royal Horticultural Society is to partner with Chatsworth for a new annual flower show from 2017. The event is expected to attract over 90,000 visitors in its first year. The RHS identify the core market as 45-65 years old, and a similar up-market, affluent demographic profile to those that attend the Chelsea and Hampton Court Flower Shows, presenting a real opportunity to maximize the benefits these visitors can bring, and a need to provide a quality accommodation offer to match.

- **C W Sellors Jewellery Design Centre, Carsington** – Ashbourne-based jeweler C W Sellors is progressing plans for a jewellery design centre near Carsington Water. The centre will offer exhibitions of British and worldwide gemstones, jewellery workshop visits and retail areas. It will provide a major new visitor attraction in the Derbyshire Peak District.

- There is potential for Belper to develop as a key visitor destination in the **Derwent Valley Mills World Heritage Site**, particularly give the regeneration of the North and East Mills. Cromford is also developing as a key focal point for visits to the World Heritage Site since the opening of the new WHS Gateway Visitor Centre in March 2016

APPENDIX 9

NATIONAL TOURISM FORECASTS, MARKET TRENDS & INFLUENCES

Forecasts for UK tourism growth are favourable. Research undertaken by Deloitte and Oxford Economics for VisitBritain in 2013[5] projects an average annual growth in domestic tourism in the UK of 3% and a 6% per annum growth in inbound tourism

A number of factors affecting future tourism trends over the next five to ten years have been articulated by VisitEngland and others. Those most relevant to demand for visitor accommodation in the D2N2 area include the following:

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

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

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

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

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

- Mobile devices (smart phones and tablets) are increasingly being used as the first primary tool for holiday searches and bookings. Wireless access on holiday and information in the right format will be key. Bookings will be more 'last minute'.

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

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

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

- **Growing interest in outdoor activities** and cheaper and more widely available outdoor equipment and clothing and bikes are fueling growth in activity holidays and breaks.

- **Touring caravan and motorhome ownership** is steadily increasing, and Caravan Club and Camping and Caravanning Club membership is growing. More and more people are getting into caravan and motorhome holidays and breaks.

- **Camping has a cooler image,** tents are much easier and quicker to erect, and camping equipment is cheaper and more widely available. Demand for camping holidays has increased.

- **Increasing interest in health and wellbeing** is fueling interest in spa breaks.

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

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

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

- **Business tourism is slowly recovering.** The number of business events held in the UK increased slightly in 2015, and was at its highest level since 2008.

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

- **Inbound tourism to the UK continues to grow.** The greatest volumetric growth is set to be in traditional markets including the USA and Western Europe but the fastest relative growth from China and other emerging markets, such as UAE, India, Brazil and South Korea, due to the increasing wealth of consumers in these countries. VisitBritain figures show a new record for inbound tourism to the UK in 2015, with total visits increasing to 35.8m, the sixth consecutive year of growth. 2016 looks set to be another record year. The UK welcomed its highest ever number of inbound tourists in August and the total number of inbound visits to the UK from January to August reached a record 25m. China moved into the top 10 most valuable inbound markets for the UK in 2015. Tourist visits from China rose by 46% to 270,000. A new streamlined visa service introduced in August 2014 and the opening of new visa application centres in Chinese cities has made it easier for Chinese people to come to the UK. There could be a reduction in demand from near European markets with the slowdown in the Eurozone economy and the possible impact of Brexit. It must also be recognised that London is likely to be the main beneficiary of inbound tourism growth, especially from long-haul markets. The UK Government, in its new Tourism Action Plan launched in August 2016, is however very focused on spreading the benefits across the UK and there are opportunities for all parts of the country to see growth in near overseas tourist markets. The South East, South West, West Midlands and North East all saw a faster rate of growth in international visits than London in 2015. Inbound tourism can however be vulnerable to major crises. London hotels, for example saw a significant fall in occupancy levels in November 2015 following the Paris terrorist attacks. It would only take a major terrorist attack in London or another major city for there to be a significant drop in overseas tourist visits to the UK.

APPENDIX 10

D2N2 VISITOR ACCOMMODATION PROPOSALS & SITES

TYPE/DISTRICT	PROPOSAL[1]	POTENTIAL SITE[2]	REFUSALS	CHANGE OF USE	PEAK PARK
DERBYSHIRE					
HOTEL					
AMBER VALLEY	Denby Pottery	Belper East Mill			
		Fuchs			
		Shipley Lakeside			
BOLSOVER	Van Dyk Hotel expansion	Markham Vale			
	Premier Inn Mansfield, South Normanton – extension				
	Derbyshire Hotel, South Normanton – extension				

[1] With planning or firmly proposed in a development scheme

[2] Includes sites that have outline planning permission for a hotel or visitor accommodation development project; sites that are currently being marketed for accommodation development; sites where accommodation development is known to be under consideration; sites put forward by local authorities (Hotel Solutions has viewed a proportion of these sites and discounted any that we do not think have potential for hotel or visitor accommodation development); other potential sites that Hotel Solutions has identified through our research and fieldwork

TYPE/DISTRICT	PROPOSAL[1]	POTENTIAL SITE[2]	REFUSALS	CHANGE OF USE	PEAK PARK
CHESTERFIELD	Premier Inn, Elder Way (under construction)	Chesterfield Waterside			
	Basil Close				
	Basin Square				
	Chesterfield Hotel – possible reopening under new owners				
DERBY	School House aparthotel	Infinity Park			
	Lodge Lane aparthotel	Performance Venue			
		Derby Triangle			
		Land & Buildings at Victoria Street (Debenhams building)			
		Old Post Office			
		Middleton House			
		Riverlights			
		Becketwell			
		One Derby			
		N Riverside			
		Friargate			
		Allestree Hall			

TYPE/DISTRICT	PROPOSAL[1]	POTENTIAL SITE[2]	REFUSALS	CHANGE OF USE	PEAK PARK
DERBYSHIRE DALES	Cavendish Hotel – conversion of coach house to four additional bedrooms				Y
	Premier Inn, Bakewell Riverside				Y
	Wye House, Bakewell				Y
			Pisani Stone Works, Cromford - Refused 51 R hotel		
				Station Hotel, Ashbourne	
				Red Lion Wirksworth	
				Miraj Hotel Ashbourne	
				Horseshoe Hotel Matlock	
				Red House Hotel Darley Dale	
EREWASH	Ibis, Long Eaton				
HIGH PEAK	Crescent Hotel, Buxton (under construction)	Buxton bottling plant		Bennetson Hall Dove Holes	
	Buckingham, Buxton				
	George Hotel Buxton				
	Old Hall Hotel, Buxton – refurbishment				
	Marquis of Granby, Bamford				Y
	Palace Hotel Buxton (3 applications)				

TYPE/DISTRICT	PROPOSAL[1]	POTENTIAL SITE[2]	REFUSALS	CHANGE OF USE	PEAK PARK
NORTH EAST DERBYSHIRE		Egstow Park, Clay Cross			
SOUTH DERBYSHIRE	Melbourne Liberal Club	Swadlincote Golf Centre			
	Melbourne View Hotel				
				Keepers Cottage Lodge, Burton	
				Station Rd Melbourne	
				Lady in Grey Shardlow	
				Bretby Hotel & Conference Centre	
PUB ACCOMMODATION					
DERBYSHIRE DALES	George Hotel Tideswell				Y
	Druid Inn, Birchover				Y
HIGH PEAK	Lamb Inn, Chinley				Y
NORTH EAST DERBYSHIRE	Plough Inn, Brackenfield				
	Horse & Jockey, Brackenfield				
B&B/GUEST HOUSE					
AMBER VALLEY		The Gardens, Shipley Country Park			
DERBYSHIRE DALES	Upper Hurst, Hathersage				Y
	Innisfree, Eyam				Y

TYPE/DISTRICT	PROPOSAL[1]	POTENTIAL SITE[2]	REFUSALS	CHANGE OF USE	PEAK PARK
HIGH PEAK	Speedwell House, Castleton				Y
	Bray Cottage, Moorfield				Y
SOUTH DERBYSHIRE	The Old Rectory, Egginton				
SELF-CATERING					
AMBER VALLEY		Shipley Country Park			
DERBYSHIRE DALES	69 planning applications in Peak Park	Wharf Shed, High Peak Junction	15 refused in Peak Park	The Park Yeavley	69 in Peak Park
	c. 60 other approvals		Hardhurst Barn, Wirksworth		
	Stydd Farm, Hulland				
	Hallowgate Farm, Frogatt				Y
	Birchwood Moor Farm				
	Hopton				
	The Barn, Bonsall				
	Filling Station, Rowsley				
HIGH PEAK	22 schemes in Peak Park		1 refused in Peak Park		22 in Peak Park
NORTH EAST DERBYSHIRE	White Horse, Woolley Moor				
SOUTH DERBYSHIRE	Cockshunt Lane, Melbourne			Windle Hill Ashbourne	
	Hobbits Hall, Overseal			Highfields House Farm, Barrow on Trent	
	The Cottages, Melbourne				

TYPE/DISTRICT	PROPOSAL[1]	POTENTIAL SITE[2]	REFUSALS	CHANGE OF USE	PEAK PARK
	Broadstone, Ticknall				
	Limberstitch Farm, Hatton Fields				
	Robinsons House, Swadlincote				
	Hill Lodge, Barrow				
	Clovermead Common, Findern				
	Hall Croft Farm, Hilton				
	Maidensley Farm. Foston				
	Park Farm, Botany Bay				
CARAVAN & CAMPING SITES					
AMBER VALLEY		Shaw Wood			
		Shipley Country Park			
BOLSOVER		Pleasley Pit Country Park			
		Poulter Country Park			
DERBYSHIRE DALES	Barn Farm, Birchover				Y
	Broadmeadow Farm, Alport				Y
	Knotlow Farm, Flagg				Y
	Duke of York, Flagg				Y

TYPE/DISTRICT	PROPOSAL[1]	POTENTIAL SITE[2]	REFUSALS	CHANGE OF USE	PEAK PARK
	CCC Youlgreave				Y
	Royal Oak, Hurdlow				Y
	Pomeroy Caravan & Camping Park				Y
	Bull'It'thorn, Flagg				Y
	Far Ditch Farm, Chelmorton				Y
	Porridge Lane, Farm, Biggin				Y
	Lancashire Gliding Club				Y
	Lower Greenfield Caravan Site, Youlgreave				Y
	Stoneacre Farm, Biggin				Y
	Greenhills, Bakewell				Y
	Miners Standard, Winster				Y
	Tagg Lane, Monyash				Y
	Rivendale Holiday Park				
	Windmill Lane, Caravan Park, Snelston				
	Ashbourne C&CC site, Bradley				
	Blackbrook Lodge Farm, Turnditch				
	Blackwall Plantation CC site, Kirk Ireton				
	The Ketch, Kniverton				
	Carsington Fields, Kirk Ireton				

TYPE/DISTRICT	PROPOSAL[1]	POTENTIAL SITE[2]	REFUSALS	CHANGE OF USE	PEAK PARK
	Packhorse Farm, Tansley				
	Brosterfield, Stoney Middleton				Y
	North Lees Camp Site, Hathersage				Y
		Highoredish, Matlock			
			Underhill Farm, Sterndale		Y
HIGH PEAK	CCC site Crowden	Grin Low, Buxton			Y
		Victory Quarry, Dove Holes			
NORTH EAST DERBYSHIRE	Land opposite Scotland Nurseries	Grassmoor Country Park			
	Mill Farm, Barlow				
SOUTH DERBYSHIRE	Springwood Fisheries	Elvaston Castle (+ camping pods, lodges)			
	Sutton Lane, Hatton Fields				
	Shortheath Farm, Overseal				
	Hill Farm, Barrow				
	Hills Lane, Stanton by Bridge				
	Hay Lane Farm, Foston				
	Dovesite Caravan Park, Melbourne				

TYPE/DISTRICT	PROPOSAL[1]	POTENTIAL SITE[2]	REFUSALS	CHANGE OF USE	PEAK PARK
GLAMPING					
CHESTERFIELD	Brampton Hall, Old Brampton				
DERBYSHIRE DALES	New Hanson Grange, Newton Grange		The Lodge, Tideswell		Y
	Riddings Park Farm. Kniveton				Y
HIGH PEAK	Oaker Farm, Hope				Y
SOUTH DERBYSHIRE	Sutton Lane, Hatton Fields				
HOLIDAY PARKS					
DERBYSHIRE DALES	Callow Top Holiday Park, Sandybrook				
	Rivendale Caravan & Leisure Park				
HIGH PEAK	Millbridge Farm, Castleton				Y
SOUTH DERBYSHIRE	Weston Hill Chalet Park	Repton Quarry, Willington			
HOLIDAY VILLAGES/ RESORTS					
CHESTERFIELD	Peak Resort				
HOLIDAY LODGE PARKS					
CHESTERFIELD			Fox & Goose Inn, Wigley		

TYPE/DISTRICT	PROPOSAL[1]	POTENTIAL SITE[2]	REFUSALS	CHANGE OF USE	PEAK PARK
DERBYSHIRE DALES		Chatsworth Estate	Longwall Bank Wood, Whatstandwell		
		Haddon Estate (Shining Bank Quarry, Haddon House Farm)			
HIGH PEAK		Goyt Valley (Forestry Commission)			
HOLIDAY LODGES					
AMBER VALLEY	Crich Lane, Belper				
DERBYSHIRE DALES	Nether Mill Farm, Sturston		Shiningford Farm, Carsington		
			Stydd Farm, Hulland		
			The Woodyard, Matlock		
NORTH EAST DERBYSHIRE	Peak Edge Hotel				
SOUTH DERBYSHIRE	Mercia Marina	Stenson Marina			
	Gunby Hill, Netherseal				
	Repton Rd, Swadlincote				
	Forest View, Melbourne				
	Springwood Fisheries				

TYPE/DISTRICT	PROPOSAL[1]	POTENTIAL SITE[2]	REFUSALS	CHANGE OF USE	PEAK PARK
	Ticknall Rd, Swadlincote				
	Burton Heath Lane, Hilton				
	Cropper, Ashbourne				
YOUTH & GROUP					
DERBYSHIRE DALES	Barn Farm Birchover	The Wharf, High Peak Junction	Old Post House, Darley Dale		Y
	Rock Mill, Stoney Middleton				Y
	Stoke Farm, Grindleford				Y
	The Barn, Bradwell				Y
	Peak District Holiday Barn, Wardlow				Y
	Victoria Hall, Cressbrook				Y
HIGH PEAK	Ollerbrook Farm				Y
	Chinley Moor House, Hayfield				Y
	Hollowford Centre, Castleton				Y
	Millers Dale Station				Y
SOUTH DERBYSHIRE	Pike Lane, Stenson				
RESIDENTIAL CONFERENCE CENTRE					
AMBER VALLEY	Hayes Conference Centre				

TYPE/DISTRICT	PROPOSAL[1]	POTENTIAL SITE[2]	REFUSALS	CHANGE OF USE	PEAK PARK
NOTTINGHAMSHIRE					
HOTEL					
ASHFIELD		Castlewood Business Park			
		Summit Park			
		Top Wighay Farm, Hucknall			
BASSETLAW	Ye Old Bell, Barnby Moor - spa	North Road, Retford		Langold Hotel	
		Retford Road, Worksop		Queens Hotel, Retford	
		Vesuvius, Worksop			
		Symmetry Park, Blyth			
BROXTOWE		Beeston Town Centre Phase 2			
		University & Enterprise Corridor			
GEDLING	Lakeside Restaurant & Spa	Teal Close, Netherfield		Grove Hotel, Daybrook	
				Station Hotel, Newstead	

TYPE/DISTRICT	PROPOSAL[1]	POTENTIAL SITE[2]	REFUSALS	CHANGE OF USE	PEAK PARK
MANSFIELD		Stockwell Gate North			
		Stockwell Gate South			
		Former Brewery site			
		Ransom Wood Business Park			
		Berry Hill			
		Land south of Caudwell Road			
		Midland Hotel – currently on the market			
NEWARK & SHERWOOD	Kelham Hall	Newark Southern Link Road – could open up a site for a pub restaurant with adjacent lodge			
	The Ram (boutique hotel)	County Council Depot, Newark			
	Travelodge (site of former Robin Hood Hotel)	Brownhills, Newark			
		Newark Showground			
		Chapel Farm, Wellow			
		Upton Hall			
		Eden Hall (previous proposal to add bedrooms)			

TYPE/DISTRICT	PROPOSAL[1]	POTENTIAL SITE[2]	REFUSALS	CHANGE OF USE	PEAK PARK
NOTTINGHAM	The Guildhall	University & Enterprise Corridor		Park Hotel	
	Unity Square	Sheriffs Lodge			
	NG2	Boots Island Site			
	Clarence Hotel – extension	Meadow Lane			
	Doubletree by Hilton Nottingham Gateway – extension	County House			
		Convention Centre			
RUSHCLIFFE	Bridgford Hall serviced apartments	Rushcliffe Borough Council offices		Swans Hotel, West Bridgford	
		CLASP site		County Hotel, West Bridgford	
		Gamston Urban Extension			
PUB ACCOMMODATION					
BASSETLAW	The Lock Keeper, Worksop			Newcastle Arms, Tuxford	
	King William IV, Worksop				
	Huntsman Inn, Retford				
	Railway Inn, South Leverton				
RUSHCLIFFE	Trent Bridge Inn				

TYPE/DISTRICT	PROPOSAL[1]	POTENTIAL SITE[2]	REFUSALS	CHANGE OF USE	PEAK PARK
B&B/ GUEST HOUSE					
NEWARK & SHERWOOD		Rufford Abbey Mill			
SELF-CATERING					
BASSETLAW	Home Farm, Retford				
	Carbyrtin Grange. Worksop				
	Red Roofs, East Markham				
	The Granary, Askham				
	Pusto Hill Farm, Everton				
	White Lion, Retford				
GEDLING	Bulcote Lodge Farm, Burton Joyce		Ricket Lane, Ravenshead		
	Newstead Abbey				
	Fairview Farm Stud, Ravenshead				
	Robin Hood Terrace, Ravenshead				
	Flat Hanson House, Linton				

TYPE/DISTRICT	PROPOSAL[1]	POTENTIAL SITE[2]	REFUSALS	CHANGE OF USE	PEAK PARK
NEWARK & SHERWOOD	Deer Barn. Thorseby	Rufford Mill Cottages			
	Wallrudding Farm				
	Haywood Oaks Farm				
	Grange Farm, Gainsborough Road				
	Church Street, Edwinstowe				
	Trent Valley Equestrian Centre				
RUSHCLIFFE	Grange Leys, Costock				
	Fosse Paddock, Cropwell Bishop				
	Landcroft Lane, Sutton Bonnington				
	Bottom House Farm, Langar				
CARAVAN & CAMPING SITES					
BASSETLAW	Clumber Lane Camp Site, Clumber Park		Marnham Fishing Lakes		
	Haxey Quays, Misterton				

TYPE/DISTRICT	PROPOSAL[1]	POTENTIAL SITE[2]	REFUSALS	CHANGE OF USE	PEAK PARK
NEWARK & SHERWOOD	Lindens Farm, Sutton-on-Trent		Forestry Holdings, Edwinstowe		
			Lurcher Farm, Farnsfield		
			Boat Lane Caravan Site, Bleasby		
			Rayfields Farm, Caunton		
RUSHCLIFFE	Janson Coarse Fishery, Redmile				
	Holme Pierrepont Camping & caravanning Club Site				
GLAMPING					
BASSETLAW	Bramley Cottage, Hayton				
GEDLING		Bestwood Country Park			
HOLIDAY PARKS					
BASSETLAW			Manor House Caravan Park, Church Laneham		

TYPE/DISTRICT	PROPOSAL[1]	POTENTIAL SITE[2]	REFUSALS	CHANGE OF USE	PEAK PARK
HOLIDAY LODGE PARKS					
BASSETLAW		Land East of Clumber Lane End Farm, Worksop (planning permission for 129 lodges)			
NEWARK & SHERWOOD	Sherwood Hideaway (permission to go up to 170 lodges)				
	Kilvington Lakes				
	Lound Hall Estate, Bothamsall				
	Center Parcs (multiple applications)				
RUSHCLIFFE	Janson Coarse Fishery				
HOLIDAY LODGES					
BASSETLAW	Eel Pie Farm, Retford				
GEDLING	Goosedale Farm, Bestwood				

TYPE/DISTRICT	PROPOSAL[1]	POTENTIAL SITE[2]	REFUSALS	CHANGE OF USE	PEAK PARK
PROJECTS WITH MULTIPLE TYPES OF ACCOMMODATION					
BASSETLAW	Sundown Adventureland (Touring caravan and camping site, camping pods, holiday lodges)	Welbeck Estate			
	Pear Tree Farm, Beckingham (holiday lodges, touring caravans)	Hodsock Priory			
	Hallcroft Coarse Fisheries, Retford (holiday lodges, static caravans, touring caravan pitches)	Clumber Park			
		Thoresby Estate			
		Thoresby Colliery (Country Park)			
NEWARK & SHERWOOD		Sherwood Forest Country Park			
		Rufford Country Park			
RUSHCLIFFE	Costock Caravan Services, East Leake				

APPENDIX 11

D2N2 - SIGNIFICANT HOTEL & VISITOR ACCOMMODATION DEVELOPMENT PROJECTS

1. NEW HOTELS

PROPOSAL	DETAIL OF SCHEME	CURRENT STATUS
Derbyshire Peak District		
The Buxton Crescent Hotel and Thermal Spa	Redevelopment of The Crescent into an 80-bedroom 5 star hotel with a thermal spa, banqueting facilities, Pump Room visitor centre and 6 small retail units. The project is being progressed by the Trevor Osborne Property Group, with funding support from High Peak Borough Council, Derbyshire County Council and HLF. The hotel will be operated by leading European spa hotel operator Danubius Hotels.	Worked commenced in May 2016. The hotel is due to open in the first quarter of 2019.
George Hotel & George Mansions, Buxton	The Trevor Osborne Group and CP Holdings acquired this property in 2007 with a view to eventually incorporating it into the Buxton Spa Quarter.	Under review
Marquis of Granby site, Bamford	Extant planning permission for an 80-90-bedroom hotel with conference and leisure facilities	
Premier Inn Bakewell	The Litton Property Group is planning to develop a 72-bedroom Premier Inn budget hotel at the Riverside Business Park in Bakewell.	Permission granted on appeal in October 2016
Derby		
Infinity Park	The masterplan for the Infinity Park business park includes sites for a 40,000 sq ft hotel and 21,000 sq ft hotel	
Chesterfield		
Premier Inn, Elder Way	Proposed 89-bedroom hotel and restaurant	Due to open in 2018
Basil Close	Proposed 86-bedroom hotel with bar, restaurant and meeting room.	Full planning permission granted January 2016
Basin Square, Chesterfield Waterside	A hotel is proposed as part of the Basin Square scheme, the first phase of the Chesterfield Waterside regeneration project.	Enabling works commenced in September 2016. An application for the layout and scale of the scheme submitted in March 2016 is currently awaiting a decision
Chesterfield Waterside	The Chesterfield Waterside scheme includes outline planning permission for a second hotel.	Outline permission granted in 2009

Elsewhere in Derbyshire		
Denby Pottery	Proposed 80-bedroom hotel as part of the expansion of the pottery's shopping village complex	Planning permission granted in August 2012 has now lapsed
Ibis Budget, Long Eaton	Proposed 80-bedroom adjacent to the Novotel Nottingham-Derby	Full planning permission granted 2015
Markham Vale	The outline planning permission for Markham Vale includes provision for a hotel	A hotel site is currently being marketed at Markham Vale
Nottingham		
The Guildhall	Proposed £100m conversion to a conference centre, 4 star hotel and offices	Nottingham City Council appointed Miller Birch as their preferred bidder for the site in March 2016
Unity Square	160-bedroom hotel proposed alongside Grade A offices and retail and leisure uses around a new public square	The site was sold to Sladen Estates and Peveril Securities in 2015
ng2 Business Park	The outline permission for the business park includes a proposal for a full-service hotel	Outline permission
Nottinghamshire		
Kelham Hall	Plans are being developed to convert Kelham Hall into a luxury hotel and spa once Newark & Sherwood District Council vacate the building in 2017/18 to move into their new offices in Newark	Hotel scheme currently being worked up
Travelodge Newark	Proposed redevelopment of the former Robin Hood Hotel in Newark town centre to provide a new 64-bedroom Travelodge budget hotel	Planning application submitted June 2016, awaiting decision.
The Ram, Newark	Proposed boutique hotel bedrooms above the recently refurbished pub and restaurant.	
North Road, Retford	100-bedroom hotel proposed as part of an urban extension to the north of Retford with housing and employment uses	
The Lock Keeper, Worksop	Proposed 39-bedroom Marston's Lodge budget hotel adjacent to The Lock Keeper pub restaurant.	Full planning application submitted July 2016 – awaiting decision.

2. HOTEL EXTENSIONS & REFURBISHMENT PROGRAMMES

PROPOSAL	DETAIL OF SCHEME	CURRENT STATUS
Derbyshire Peak District		
The Cavendish Hotel, Baslow	Conversion of former coach house to provide 4 additional guest bedrooms	To be progressed in 2017
Old Hall Hotel, Buxton	This hotel is also owned by the Trevor Osborne Property Group and is managed by Danubius Hotels. It is being linked into The Crescent Hotel & Spa, with direct access to the hotel's spa, and will be upgraded to a 4 star or boutique standard.	The hotel will lose some of its meeting rooms in January 2017 for incorporation into The Crescent Hotel project. It will be upgraded in 2018/19 ready for when The Crescent Hotel opens.
Buckingham Hotel, Buxton	Proposed demolition of the existing hotel and replacement with a new high quality 110-bedroom hotel with ground floor restaurant and bar facilities. The proposed hotel will be designed to be as environmentally sustainable as possible. Guest bedrooms will include enclosed steam showers and infra-red sauna cabins.	Planning application submitted May 2016 awaiting a decision.
Chesterfield		
The Chesterfield Hotel	Closed hotel currently on the market	The selling agents indicated that they have received interest from prospective buyers that are interested in reopening the hotel.
Elsewhere in Derbyshire		
The Derbyshire, South Normanton	The hotel has planning permission for a 54-bedroom extension granted in October 2015	The current owners (Starwood Capital) have no plans currently to progress the extension.
Premier Inn Mansfield, South Normanton	20-bedroom extension	Planning permission granted February 2016
Hotel Van Dyk, Clowne	Proposed phased expansion of the hotel to take it up to 101 bedrooms, with additional conference and banqueting facilities, restaurant space and a leisure spa.	Outline planning permission granted in 2015.
Nottinghamshire		
Ye Olde Bell, Barnby Moor	The hotel is currently building a £3/4 million spa to help position is as a destination hotel to boost weekend trade.	Under construction. Due to open March 2017.
Doubletree by Hilton Nottingham Gateway	36-bedroom extension	Planning permission granted October 2016
Hilton Nottingham	Major refurbishment	Planned in the next 3 years

3. HOLIDAY VILLAGES, HOLIDAY PARKS & HOLIDAY LODGE PARKS/ HOLIDAY LODGE DEVELOPMENTS

PROPOSAL	DETAIL OF SCHEME	CURRENT STATUS
Derbyshire Peak District		
Rivendale Caravan Park	Consent for a spa complex	
Longnor Wood	Proposed addition of 12 luxury caravan holiday homes to be marketed through Hoseasons' Bouja boutique caravan breaks brand.	Currently seeking planning permission
Chesterfield		
Peak Resort	A major holiday resort that will include a 212-room aparthotel, 250 woodland lodges, a 26-room golf hotel, an 18-hole championship golf course, golf driving range, 120 hectares of parkland with walking and cycling trails, and indoor water sports, adventure and other leisure facilities	
Elsewhere in Derbyshire		
The Red Lion/ Peak Edge Hotel, Ashover	Proposed construction of 20 holiday lodges for rental	Full planning permission granted in May 2016
Nottinghamshire		
Kilvington Lakes	Proposed 5 star holiday resort with 34 eco lodges; an inn with 25 bedrooms; 15 luxury camping pods; a café, leisure complex with gym pool and spa; an conference and educational room; a watersports and activity hub; a swimming lake; children's play areas; bird hides; and walking trails, boardwalks and cycle paths.	Planning permission granted January 2015
Clumber Road, Worksop	Proposal for a holiday lodge park with 129 lodges and a central leisure complex.	Outline permission granted August 2015. The site is currently being marketed for sale.
The Sherwood Hideaway	The site has planning permission for 177 lodges, of which 30 have so far been developed.	
Sundown Adventureland	Proposal for 40 holiday lodges, 15 camping pods, 61 touring caravan pitches and 16 tent pitches on land adjoining Sundown Adventureland	Planning application submitted October 2016
Pear Tree Farm, Beckingham, Bassetlaw	17 holiday lodges and a touring caravan site proposed alongside the development of a new visitor attraction with craft units, a farm shop, farm animal enclosures and adventure play space	Full planning application submitted August 2016, awaiting decision.
Eel Pie Farm	Proposed development of 12 holiday lodges	Outline planning application submitted June 2016, awaiting decision.

4. CARAVAN & CAMPING SITE DEVELOPMENTS

PROPOSAL	DETAIL OF SCHEME	CURRENT STATUS
Derbyshire Peak District		
Greenhills Holiday Park, Bakewell	The site is currently converting 50 tent pitches to touring caravan pitches, to be ready for Easter 2017	Underway
Castleton Caravan Club Site	Major redevelopment planned for 2017, including more hard standing pitches and the introduction of fully serviced 'super' pitches.	Planning application submitted to the Peak District National Park in September 2016. Awaiting a decision.
Elsewhere in Derbyshire		
Elvaston Castle and Estate	The 10-year Vision & Plan for the Castle and Estate refers to the redevelopment of the former Caravan Club site for caravanning, camping and glamping.	Currently under review
Nottinghamshire		
Hallcroft Coarse Fisheries	Proposed 30-pitch touring caravan site with 5 holiday lodges and 12 caravan holiday homes.	Full planning permission granted June 2016

5. CAMPING PODS DEVELOPMENTS

PROPOSAL	DETAIL OF SCHEME	CURRENT STATUS
Derbyshire Peak District		
Mount Cook Adventure Centre	Adding 10 camping pods in 2017	
YHA	YHA is looking at adding camping pods to a number of its hostels in the Derbyshire Peak District	

APPENDIX 12

NATIONAL ACCOMMODATION DEVELOPMENT TRENDS

National Hotel Development Trends

National hotel development trends of relevance to Derbyshire and Nottinghamshire are as follows:

Budget Hotel Development

- The ongoing development of **Premier Inn and Travelodge budget hotels.** As the market leaders in the UK budget hotel sector Premier Inn and Travelodge have continued to open hotels apace across the UK. Travelodge opened 20 new hotels in the UK in 2016, with an investment value of £140 million, creating 450 new jobs and increasing the company's network to 543 hotels. New locations include further hotels in London, major towns and cities including Bristol, Glasgow, Milton Keynes, Oxford, Harrogate and Derby, seaside resorts and smaller towns. The company has identified 250 further locations where it would like to open new hotels. Premier Inn opened 37 new hotels in 2016, including hotels in Derby, Newcastle, Manchester, Cheltenham, Farnborough, Colchester, Exeter, Bristol, Buxton, Matlock, Cirencester, Farnham and Lewes. The company is aiming to increase to 900 hotels and 85,000 bedrooms by 2020. Both Travelodge and Premier Inn are now focusing on town and city centre or edge of town hotel development. They are no longer developing roadside hotels in the way that they were in the early 1990s.

- In terms of **other established budget hotel brands**, the French hotel company **Accor** has relaunched its budget hotel offer under three brands – Ibis, Ibis Budget (replacing Etap) and Ibis Styles as a budget boutique brand for franchised independent hotels. The company opened 4 Ibis Styles hotels in 2016 in Greenwich, Birmingham, Manchester, and at Heathrow Airport, together with Ibis hotels at London Canning Town and in Cambridge. An Ibis Budget hotel will open at London Luton Airport in 2017.

- A new entrant to the UK budget hotel market is the Malaysian budget hotel operator **Tune Hotels**. It has rapidly established itself in London and is now targeting other UK cities, so far opening in Liverpool, Newcastle and Edinburgh in 2015. It is aiming to open up to 25 new hotels in the UK by 2020, targeting major business cities such as London, Manchester, Birmingham and Leeds.

- At the **upper-tier budget/ limited service 3 star level**, the **Holiday Inn Express** and **Hampton by Hilton** brands have continued to develop, with new hotels opening or planned across the UK in locations such as Sheffield, York, Wakefield, Birmingham, Luton, Newcastle, Bournemouth, Wigan, Leigh, Bristol, Oxford, Bridgewater, Stockport, London Vauxhall Nine Elms, Canterbury, and Bristol, Stansted and Humberside Airports. Holiday Inn Express has recently unveiled its new generation hotel product that will feature the latest in-room smart technology, redesigned bedrooms with a flexible work/rest corner, and a new food and beverage concept. The first UK hotels to feature the new product are at London's Park Royal, Ealing, Grimsby and Portsmouth.

- In terms of other upper-tier budget brands, Wyndham's **Ramada Encore** brand has seen its UK presence diminish as a number of its franchised hotels have been sole and new owners have switched to other brands such as Ibis Styles, Pentahotel and Travelodge. London-based glh Hotel Group announced plans in 2015 for its new **Thistle Express** budget hotel concept. The first hotel will open under the brand in London, and the company has plans to open a further 10 hotels over the next 5 years.

- At the other end of the spectrum, **Easyhotel** has announced plans to significantly expand its super-budget hotel chain across the UK. It has identified 36 major towns and cities where it wants to have owned or franchised hotels. New Easyhotels opened in Liverpool, Birmingham and Manchester in 2016 and are planned for Ipswich, Reading and Leeds for 2017.

- A more recent trend has been the emergence of **budget boutique hotels** in major cities from companies such as Nadler Hotels (previously Base2Stay, which has hotels in London and Liverpool and is progressing plans to open a hotel in Manchester in 2019), Big Sleep (with hotels in Cheltenham, Eastbourne and Cardiff), Sleeperz (with hotels in Newcastle and Cardiff), Citizen M (with hotels in London and Glasgow) and Starwood Hotels' Aloft brand (which opened a second UK hotel in Liverpool in 2014 to add to its first property at London ExCeL, and has plans to open another two hotels in 2017 in Brighton and London). These are limited service hotels that feature contemporary interior design and a high-tech fit out. The German budget boutique hotel operator Motel One has entered the UK market, with new hotels in 2014 and 2015 in London, Edinburgh, Manchester and Newcastle. The company is due to open a second hotel in Manchester in 2017 and a new hotel in Glasgow in 2018. Other target locations include Liverpool and Birmingham. Marriott has announced plans to introduce its Moxy budget boutique hotel brand into the UK, with hotels announced for London, Heathrow, Edinburgh Airport, Aberdeen, York and Southampton. The French hotel company Accor is planning to launch its Mama Shelter and Jo & Joe budget boutique hotel brands in London. London-based Ennismore has announced plans to open 25 NoCo budget boutique hotels in key cities across the UK. Spanich hotel group Room Mate is planning to launch in the UK, with central London its first target.

- Another emerging trend in UK city centres is the development of **small format budget boutique hotels** which offer compact, sometimes windowless bedrooms that feature contemporary design and high tech features for a very affordable price. The small bedroom size allows highly economical hotel development which can be passed onto the customer in terms of lower room rates. Key brands that are developing these types of hotel are Hub by Premier Inn (which opened its first hotel in London's Covent Garden in November 2014, followed by a second London hotel in 2015 and plans for a further 13 hotels in London and Edinburgh); Z Hotels (which now has 8 hotels in London, Liverpool and Glasgow and a hotel under construction in Bath), QBic Hotels (which launched in London and has announced plans for a further 4 hotels in the capital and a possible roll out to other major cities such as Edinburgh, Glasgow and Manchester), Bloc Hotels (with hotels at Gatwick and in Birmingham city centre); and Yotel (which has hotels at Heathrow and Gatwick and plans for hotels in Manchester and London).

- These newer budget, budget boutique and small format budget boutique hotel companies will focus initially on London, major metropolitan cities and airport locations before looking at other towns and cities once they have a stronger market presence and hotel network in the UK.

4 Star Hotel Development

- 4 star hotel development in the UK has been focused on London and other major cities with 4 star brands Doubletree by Hilton, Hilton, Crowne Plaza, Hotel La Tour, INNSIDE by Melia, Pullman, Radisson Blu, Apex, Park Plaza and Novotel opening or building new hotels in cities such as Glasgow, Manchester, Birmingham, Liverpool, Newcastle, Leeds, Southampton, Bath and Cambridge.

Table 2
PROVINCIAL UK 4 STAR HOTEL DEVELOPMENT 2015-2017

Hotel Brand	Provincial UK Openings 2015-2017
Crowne Plaza	Newcastle Cambridge Manchester
Hilton	Southampton Leeds Cambridge
Doubletree by Hilton	Liverpool
Radisson Blu	Hull Birmingham Airport
Pullman	Liverpool
Novotel	Brentford London Canary Wharf
Park Plaza	Manchester
INNSIDE by Melia	Manchester Birmingham Glasgow
Park Regis	Birmingham
Hotel La Tour	Milton Park, Oxfordshire
Sandman	Gatwick Airport Aberdeen
Apex	Glasgow Bath
Harbour Hotels	Brighton Bristol
Maldron	Newcastle
O'Callaghan	Cambridge

- London-based hotel group glh launched a limited service 4 star hotel brand called 'every hotels' in 2014 through the rebranding of four of its Thistle branded hotels. It is looking to expand the brand to other UK cities through management contracts. Leonardo Hotels, the European arm of the Israeli Fattal Hotels Group, opened its first UK property at Heathrow Airport in March 2015, as the first stage in its plans to expand in the UK. The German Steigenberger hotel company is looking to introduce its InterCity Hotels

4 star brand into major UK cities. Other 4 star brands looking to enter the UK market are Louvre Hotel Group's Golden Tulip brand and the Portuguese hotel company Pestana Hotels. Accor Hotels will open a 313-bedroom Novotel at London's Canary Wharf in September 2017 and is planning to expand its 4 star Mercure brand in the UK through franchise agreements with existing hotels. This will start with the repositioning of the independently operated Chalon Court Hotel in St Helens under the Mercure brand in 2017. Luxury international hotel company Shangri-La Hotels & Resorts is looking at potential sites in London, Manchester and Birmingham for its 4 star Hotel Jen brand. The Malaysia-based St Giles Hotel Group has acquired a site near Birmingham New Street station and is currently applying for planning permission for a 400-bedroom 4 star hotel. It hope to start work on the hotel in 2017. Australian hotel company Staywell Hospitality launched its first European 4 star Park Regis hotel in Birmingham in March 2016. Irish hotel company O'Callaghan Hotels is currently developing the 155-bedroom 4 star Tamburlaine Hotel in Cambridge, due to open in 2017. Another Irish hotel company, Dalata is progressing plans for a 226-bedroom Maldron 4 star hotel in Newcastle-upon-Tyne, for a 2018 opening. Dorset-based Harbour Hotels opened new 4 star hotels in 2016 in Bristol and Brighton.

3 Star Hotel Development

- At the 3 star level Village Hotels opened three new hotels in Scotland in 2014/15, in Aberdeen, Edinburgh and Glasgow. The brand's new owners (KSL Capital Partners, who acquired the hotels from De Vere in 2014) are planning to invest in expanding the brand across Southern England. Planning permission was secured in December 2015 for a £21million, 153-bedroom Village hotel on the Lakeside North Harbour business park in Portsmouth. Plans have also been unveiled for a Village hotel in Basingstoke. Hilton opened a 3 star Hilton Garden Inn at Heathrow Airport in December 2014. A Hilton Garden Inn opened in Sunderland in 2016 and plans have been announced for Hilton Garden Inn hotels in Manchester. Doncaster and Hull. A new Holiday Inn opened in Manchester city centre in 2016 and a further Holiday Inn is planned for the city for 2018. Marriott is looking at rolling out its redefined Courtyard by Marriott midmarket brand in the UK, starting with the opening of a new hotel in Edinburgh city centre in 2016 and a hotel in Glasgow in 2017. Amaris Hospitality (the hotel division of the global private equity firm Lone Star Funds) has announced major expansion plans for the 3 star Jurys Inn brand following its acquisition by Lone Star in July 2015. Eight Amaris hotels were converted to the Jurys Inn brand in November 2015 and the company is looking to grow the Jurys Inn portfolio across the UK by targeting leasing opportunities as well as development sites.

Boutique Hotel Development

- A key trend in the last 20 years has been the development of boutique hotels through the upgrading and repositioning of existing hotels, the conversion of suitable, and sometimes unusual buildings, and in a few cases the development of new-build boutique hotels. These are high quality hotels that feature contemporary interior design and good food and service, often with quite a relaxed atmosphere. The first boutique hotel to open in the UK was the Hotel du Vin in Winchester in 1994. Hotel du Vin has gone on to open a further 16 hotels in locations such as Royal Tunbridge Wells, York, Cambridge, Brighton, Cheltenham, Henley-on-Thames and Newcastle. It was followed by other boutique hotel companies including Malmaison (which now has 15 hotels in major cities such as London, Manchester, Liverpool, Newcastle and Oxford); Abode Hotels (with hotels in Manchester, Glasgow, Chester, Canterbury and Exeter); and Myhotel (with two hotels in London and one in Brighton). The Malmaison and Hotel du Vin Group was acquired by Frasers Hospitality in June 2015. The new owners acquired 4 hotels in 2015 in Bristol, Exeter, Brighton and Cheltenham as part of its plans to expand the two brands. The Brighton and Cheltenham hotels have been converted to the Malmaison brand, while the Bristol and Exeter hotels have reopened as Hotel du Vin hotels. A new Hotel du Vin is also under development in Stratford-upon-Avon, with an opening scheduled for 2017. Plans have been unveiled for a 124-bedroom Malmaison hotel in the centre of York.

- Independent boutique hotels have also opened in many different types of location, including:

    - Historic towns and cities such as Bath, Shrewsbury, Royal Tunbridge Wells, Cambridge, Lincoln, Norwich and Oxford;
    - Market towns such as Cirencester, Ludlow, Romsey in Hampshire, Helmsley in North Yorkshire and Stamford in Lincolnshire;
    - Other towns and cities such as Luton, Peterborough, Leicester, Nottingham, Derby, Colchester, Ipswich and Farnborough;
    - Rural locations in terms of the development of boutique country house hotels

- International hotel chains have also launched boutique and lifestyle hotel brands in major UK cities. Leading the field in this has been IHG (InterContinental Hotels) with its Hotel Indigo brand, with hotels now open in Liverpool, Newcastle, Birmingham, Edinburgh, Glasgow, Brighton, York, Cardiff and London, and hotels planned for Oxford, Durham and Manchester. Accor Hotels launched its MGallery boutique brand in the UK in 2012, with hotels in London and bath. It added two new hotels in 2015 in Cheltenham and Windsor, through the repositioning of former Mercure branded hotels. The company acquired a 30% stake in the German boutique hotel chain 25hours Hotels in 2016, with a view to accelerating its global expansion, including bringing the concept to the UK. InterContinental Hotels Group (IHG) is currently looking at launching its Kimpton Hotels boutique brand in the UK as part of its European expansion plans.

- Liverpool-based hotel group Signature Living opened the luxury boutique 30 James Street Hotel and football themed boutique Shankly Hotel in Liverpool in 2015. The group is currently progressing plans for further hotels in Liverpool, a project to convert Preston's historic former Post Office into a 60-bedrrom luxury boutique hotel, and a scheme to transform Cardiff's former Coal Exchange building into a £35m, 200-bedroom luxury hotel.

Lifestyle Hotels

- Recent research[8] shows that the next generation of hotel guests will be looking for a different type of hotel experience than is currently available, with more emphasis on a relaxed atmosphere, distinctive style, design and service, public areas where guests can relax, congregate and interact and full connectivity in terms of Wi-Fi and bandwidth capabilities that enable guests to use multiple devices while away from the office or home. The major hotel companies are beginning to recognise these needs through the development of this new generation of design-led, technology-focused lifestyle hotels, as well as the development of some of the budget boutique and new small format budget boutique hotel products that are emerging.

- In terms of **lifestyle hotel brands**, Hilton launched the Canopy by Hilton lifestyle hotel brand in 2014, with plans for a UK roll out starting with London. Rezidor has announced plans to introduce its Radisson Red lifestyle hotel brand into the UK, with its first hotel planned for Glasgow. Luxury international hotel operator Hyatt opened its first UK Hyatt Place lifestyle hotel at Heathrow in 2015, and has ambitions to introduce the brand into major UK cities. It will open a second Hyatt Place at Heathrow Airport in 2017. Marriott launched its AC by Marriott lifestyle hotel brand in the UK in 2016, with new hotels in Birmingham and Manchester. The German 'neighbourhood lifestyle' hotel operator Pentahotels has rapidly expanded in the UK, with the opening of a new hotel in Warrington in 2013, and new hotels in 2014 in Birmingham, Derby, Inverness and Ipswich (through the conversion of former Ramada Encore branded hotels). It secured a site for a London hotel in 2016, and has more than 30 UK locations currently under scrutiny.

[8] 'A New Breed of Traveller: How Consumers are Driving Change in the Hotel Industry', HVS, November 2013

Themed Hotels

- Another trend in the UK hotel sector is the opening of themed hotels including:
  - Art-themed hotels
    - The Artist Residence hotel group opened its first hotel in Brighton in 2008. The concept is based on inviting local artists to decorate bedrooms in return for accommodation. The Brighton hotel was followed by a 10-bedroom Artist Residence in Penzance in 2010 and an 8-bedroom property in London in 2014. The group will open its fourth hotel in South Leigh in Oxfordshire in March 2017. This will be more of a pub restaurant with 12 individually designed guest rooms in the main pub building and converted outbuildings. All of the group's hotels feature curated collections of artwork.
    - The Laslett in London's Notting Hill (www.living-rooms.co.uk/hotel/the-laslett)is a 51-bedroom boutique hotel featuring a collection of artworks. It hosts exhibitions and installations from local photographers and artists in its lobby.
    - Wales' first contemporary art hotel opened in St David's, Pembrokeshire in January 2016. The 19-bedroom Twr y Felin Hotel (www.twryfelinhotel.com) features over 100 original artworks portraying the local area and a pop-up gallery by graffiti artist Pure Evil featuring spray-painted portraits of Welsh film and music icons.
    - The PPHE Hotel Group will open its first UK luxury lifestyle art'hotel hotels in London in 2019. The art'hotel London Battersea Power Station will feature a collection of artworks from some of the world's most exciting artists, while the art'otel London Hoxton (www.artotels.com/offers/2950479) will include an arts centre with an art gallery, space for video artists and photographic studios.
    - Green Rooms (http://greenrooms.london/#/home), the UK's first arts-led social enterprise hotel opened in Wood Green, London in April 2016. The hotel is aimed at artists visiting and working in London and looking for affordable accommodation. It offers 20 double bedrooms, two studio apartments and two 20-bed dormitories. The hotel incudes a multi-use gallery and workspace.
    - Edinburgh's Royal High School could be transformed into a multi-million-pound arts hotel. The latest plans for the building are for a high-end hotel with a public gallery space. Three international hotel operators are currently looking at the scheme.

- Football-themed hotels

  - GG Hospitality, headed by former footballers Gary Neville and Ryan Giggs, opened its first Hotel Football (http://hotelfootball.com) at Old Trafford, Manchester in February 2015, and is set to open a second site at a yet-to-be confirmed location.
  - The Shankly Hotel (http://shanklyhotel.com) featuring memorabilia honouring the former Liverpool FC manager Bill Shankly opened in Liverpool in 2015.

- Music-themed hotels

  - The Hard Days Night hotel (www.harddaysnighthotel.com) is a Beatles-themed boutique hotel in Liverpool.
  - Hard Rock Hotels will open its first UK music-themed hotel in London in 2018. The group is also working up plans for a hotel in Glasgow and is interested in opening hotels in other major UK cities, including Liverpool, Manchester and Birmingham.
  - The Convent at South Woodchester in Gloucestershire (http://theconvent.net) combines a live music venue with a 10-bedroom boutique hotel, music-themed bar restaurant and recording studios.

- Gamer-centric hotels

  - The German lifestyle hotel chain Pentahotels is to launch a new gamer-centric hotel product in 2017, with PentaPlayPads that will feature Sony Playstation4 consoles, table football and pinball machines. The design will be launched in Brussels, Liege and Paris in 2017 before being rolled out to all pentahotels worldwide by 2017.

- Food and drink-themed hotels

  - Scottish brewer Brewdog is progressing plans for a craft beer-themed hotel alongside its brewery in Aberdeen. The hotel's restaurant will focus on beer and food pairings and stays will include brewery tours.
  - London's Portobello Road Gin opened The Distillery gin-themed visitor centre and boutique hotel in December 2016. The property has three guest bedrooms, a gin bar, restaurant, gin museum and blending room.
  - The Chocolate Boutique Hotel in Bournemouth (www.thechocolateboutiquehotel.co.uk) is the UK's first chocolate themed hotel.

- Justice-themed hotels
  - The luxury boutique Courthouse Hotel (www.courthouse-hotel.com) opened in London's Shoreditch area in 2016. The hotel has been developed through the conversion of the former Great Marlborough Street Magistrates Court. The themes of crime, punishment and justice are embedded in the hotel's design, particularly in the bar.
- Social hotels
  - A boutique floating hotel opened at the King George V lock in the London Docklands in December 2016. The Good Hotel (www.goodhotellondon.com) is based on an ethos of helping the long-term unemployed to get back to work by offering extensive training in various jobs in the hospitality sector. The hotel is operated by Amsterdam-based Good Hotel Group. The London hotel is the group's third development and the company is looking to open another eight hotels across the world by 2020.

5 Star Hotel Development

- 5 star hotel development has focused on London, with a number of international 5 star brands having opened here in recent years or with hotels under development in the capital, including Shangri-La Hotels, Dorsett Hospitality International, Rosewood Hotels, InterContinental, Four Seasons, the US luxury hotel operator Thompson Hotels, Bulgari, Marriott International's Autograph Collection, Rezidor's new Quorvus Collection, and the Hong Kong-based hotel company The Harilela Group.

- Beyond London, it is only major cities like Manchester, Edinburgh and Glasgow, and the leading heritage cities of York, Bath, Chester and Oxford that are able to support 5 star hotels. The new Gainsborough Bath Spa hotel opened in Bath in 2015.The Osborne Group and Hungarian Danubius Hotels Group are currently developing The Crescent in Buxton as a luxury hotel and spa. An investment deal signed between Sheffield City Council and the Chinese construction company Guodong UK Ltd in July 2016 could result in the conversion of Sheffield's Central Library into a 5 star hotel.

Dual-Branded/ Two-in-One Hotels

- Two-in-one/dual-branded hotels, where customers are offered a choice of two hotel brands on the same site are set to become increasingly common in the UK. IHG opened a combined Holiday Inn and Staybridge Suites hotel within London's Westfield Stratford City shopping centre in 2012 and will open adjacent Crowne Plaza and Staybridge Suites hotels in Manchester in 2017 and dual-branded Holiday Inn/ Staybridge Suites and Crowne Plaza/Holiday Inn Express hotels at Heathrow Airport in 2018. Cycas Hospitality and Slough Urban Renewal are set to open a dual-branded Moxy budget boutique and Residence Inn extended-stay hotel in Slough in 2019. Accor Hotels has a campus of three hotels in Southampton – a Novotel, Ibis and Ibis Budget, all on the same site.

Serviced Apartments and Aparthotels

- Another significant trend in the UK hotel market has been the development of the serviced apartment and aparthotel sector in UK cities and business locations. There are two main models that have developed in the UK. The first is serviced apartment companies that manage and market residential apartments on behalf of their owners. This can range from the letting of individual apartments to whole floors and blocks of apartments in a residential complex. These companies tend to be local or regional operations. They often also work with national and international serviced apartment booking agencies such as Silverdoor, Citybase and ESA. The second model is purpose-built aparthotels or serviced apartment complexes that are being developed either by local independent operators; small, mainly regional serviced apartment companies (e.g. MAX Serviced Apartments, Go Native and Cotels); national serviced apartment and aparthotel companies (e.g. SACO, Staycity, Roomzzz, Premier Apartments, Go Native, Apple Apartments and the newly launched Room2, CitySuites, Locke and Urban Villa brands); international serviced apartment companies (e.g. Bridgestreet, Fraser Hospitality, Ascott and Cheval); and increasingly international hotel chains that are launching extended stay hotel products in the UK (e.g. IHG's Staybridge Suites, Accor's Adagio Aparthotel, Marriott's Residence Inn, Starwood's Element and Hyatt's Hyatt House brands). Serviced apartment companies and aparthotels generally trade at very high levels of occupancy. They primarily target long stay corporate demand and infill with weekend leisure business between corporate lets. This form of accommodation is becoming increasingly popular with both business and leisure guests as it provides more space, greater flexibility and usually good value for money. The sector is predicted to see substantial growth as UK customers begin to more fully understand the concept and how it can work for them. A report by The Association of Serviced Apartment Providers (ASAP) and Savills, published in December 2015 suggests that the UK serviced apartment sector is set to double in size over the next 2 years. It predicts growth of 122 per cent for national operators and 82 per cent for regional providers by the end of 2017, effectively doubling the total number of serviced apartment units across the UK.

- In terms of recent trends in the sector and future plans:
  - Staycity opened new aparthotels in Birmingham in February 2016 and York in July 2016, and has announced plans for aparthotels in London and Liverpool. Large cities in the UK continue to be a key target for the brand.
  - Roomzzz opened new aparthotels in Chester and Nottingham in 2015, London Stratford, Manchester, and Harrogate in 2016, and will open aparthotels in York and Liverpool in 2017.
  - Cotels opened a new serviced apartment operation in Luton in 2015.
  - The Serviced Apartment Company (SACO) doubled the size of its operation in 2016, with new properties in London, Edinburgh, Aberdeen and Farnborough. The company launched its new Locke lifestyle aparthotel brand in 2016 with the opening of its first property in London, the Leman Locke (www.lockeliving.com) and a second property due to open in Edinburgh in 2017. The company plans to target further UK and European cities for the expansion of the brand.
  - The Dublin-based Prem Group has launched two sub-brands alongside its Premier Apartments brand – Premier Suites and Premier Suites Plus. It is also expanding in Scotland, with the opening of a Premier Suites Plus in Glasgow, taking its UK portfolio to nine serviced apartment buildings.
  - Bridgestreet is set to launch its Mode Aparthotel by Bridgestreet brand in the UK in 2017, with openings targeted for London, Edinburgh, Glasgow, Leeds, Birmingham, Oxford and Cambridge over the next 3-4 years.
  - Starwood Hotels will introduce its Element extended stay brand to the UK in London's Tobacco Dock in 2017.
  - A new Staybridge Suites aparthotel will open in Manchester in 2017.
  - Accor Hotels opened a 146-apartment Adagio aparthotel in Edinburgh in December 2016.
  - Apple Apartments will open a 21-apartment aparthotel in Edinburgh in 2017.

- Urban Villa is progressing plans for a 105-apartment aparthotel with a casino, spa and gym in Preston.
- Serviced apartment group Ascott announced in November 2016 that it is to launch a new aparthotel brand in the UK targeted at Millennial travellers. Lyf aparthotels will feature communal spaces with film projection screens, table football, hammocks and giant ball pools. Customers will be able to check in and out online, and each property will be staffed by millennial-aged 'Lyf Guards'. The group is aiming to open 10,000 Lyf units by 2020, targeting city sites in the UK, Germany, France, Australia and Japan.
- Property group Lamington launched the new design-led Room 2 aparthotel brand in London in 2016 with a 16-apartment property. Further sites will open in 2017 and 2018, including a 71-apartment property in Southampton.
- CitySuites will launch its first luxury aparthotel in Manchester in 2017. The 17-storey property will include 244 studios and one and two-bedroom apartments, and on-site pool, gym and valet parking.

Sports Stadia Hotels

- Hotels have been developed or are planned for a number of sports stadia in the UK. A 4 star Marriott opened at Twickenham stadium in 2009; a 4 star Doubletree by Hilton hotel opened at the MK Dons football stadium in Milton Keynes in 2009; a 4 star Hilton opened at Hampshire County Cricket Club's Ageas Bowl cricket ground in Southampton in 2015; a 120-bedroom Premier Inn opened at Worcestershire County Cricket Club in 2014; Lancashire County Cricket Club is planning to develop a 150-bedroom Hilton Garden Inn at its Emirates Old Trafford ground in Manchester; a 141-bedroom Hilton Garden Inn opened at Sunderland FC's Stadium of Light in May 2016. There are also proposals for a hotel as part of the redevelopment of Edgbaston cricket ground; plans for a hotel as part of the development of Surrey County Cricket Club's Kia Oval stadium at Kennington in London; plans for a 150-bedroom Hampton by Hilton hotel at Durham County Cricket Club's ground at Chester-le-Street; proposals for a hotel as part of Southend United FC's new Fossetts Farm stadium; and plans for a 150-bedroom Hilton Garden Inn at Doncaster Racecourse. Scottish Rugby has unveiled plans to develop a hotel next to Murrayfield Stadium in Edinburgh. Ascot Racecourse is considering building a 150-bedroom hotel to cater for racegoers and tourists visiting Windsor. The Welsh Rugby Union has unveiled a strategic plan for the Millennium Stadium in Cardiff, which includes the development of a 100-bedrrom hotel and conference centre.

University Hotels and Conference Centres

- Another trend in UK cities has been the development of university hotels and conference centres. A number of major universities, such as Loughborough, Lancaster and Stirling have had hotels on their campuses for some time and others have recently developed, or are considering developing, hotels and conference centres, in some cases working with major hotel operators. In most cases universities are looking at hotel development to enable them to accommodate overseas students and business executives attending their growing short course programmes, or to enable them to target academic, association and research conferences both during term time and in vacation periods. Hotels on university campuses also cater for university visitors and in some cases trade in the local corporate and leisure tourist markets when they have spare bedroom capacity. The University of Nottingham opened the £20m, 202-bedroom 4 star Orchard Hotel adjacent to the East Midlands Conference Centre on its campus in November 2012. The University of Leicester opened the 123-bedroom College Court conference centre in 2013 and the University of Manchester is currently progressing the development of a 220-bedroom Crowne Plaza hotel and a 116-suite Staybridge Suites aparthotel as part of the £1bn development of its Manchester campus. The University of Edinburgh invested £1.6m in 2016 in the refurbishment of its Masson House guest accommodation complex. Other universities that have been looking at hotel development are the University of Kent at Canterbury, Keele University at Stoke-on-Trent, Sunderland University, and the University of Surrey in Guildford.

Rural Hotel Development

Hotel development trends in rural locations are as follows:

- At the top end of the market there has been activity in terms of the development of **luxury country house hotels**, including the opening of Lime Wood in the New Forest National Park and the soon to open Heckfield Place near Hook in Hampshire; the £30 million development of the Raithwaite Estate in North Yorkshire as a luxury hotel and spa; the 22-bedroom, 5 star Villa Levens country house hotel to the south of Kendal in Cumbria that opened in October 2015; the Barton Hall Hotel that opened in Northamptonshire in 2014; the opening of the Ellenborough Park Hotel & Spa near Cheltenham in 2011; the redevelopment in 2012 of Wood Norton Hall near Evesham as a country house hotel; the £30million development of The Cornwall Hotel, Spa and Estate at St Austell; and the opening of the Beaverbrook luxury country house hotel at Leatherhead in Surrey in 2016. Plans have also been unveiled for the development of new luxury country house hotels in West Yorkshire (involving the conversion of Bretton Hall near Wakefield); Wigan (the transformation of the Haigh Hall stately home into a luxury boutique hotel; Cheshire (the restoration and conversion of Doddington Hall near Nantwich into a 120-bedroom 5 star country house hotel); North Yorkshire (the conversion and extension of Grantley Hall near Harrogate into a 51 suite luxury hotel and spa); and Camberley, Surrey (the conversion of Minley Manor into a 5 star country house hotel and spa).

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

- English Lakes Hotels is currently investing £16m in the refurbishment and expansion of the Low Wood Bay Resort & Spa on Lake Windermere. The expansion includes another 32 suites and studio rooms (taking the hotel up to 133 rooms), a new restaurant, club lounge, outdoor leisure facilities and a spa, transforming the hotel into a major leisure resort. Planning permission for the scheme was unanimously approved by the Lake District National Park Authority in 2015.

- Another Place, a new collection of individual destination properties will launch its first hotel in the Lake District National Park in August 2017, through the conversion of the Rampsbeck Hotel at Watermillock on Ullswater into the Lake, a 40-bedroom luxury country house hotel. The hotel will be the first of a planned six Another Place properties over the next 10 years, including the redevelopment of the Royal William Yard in Plymouth into a boutique hotel as the companies next project.

- Recent years have also seen the development of a number of smaller **boutique country house hotels through** the conversion of country mansions, upgrading and repositioning of existing hotels, or development of redundant outbuildings at country house properties. Examples include:

    - The Cranleigh at Bowness-on-Windermere in the lake District (www.thecranleigh.com)
    - Thyme House, Southrop, Gloucestershire (www.thymeatsouthrop.co.uk)
    - The Coach House Hotel, Middleton Lodge, near Richmond, North Yorkshire (www.middletonlodge.co.uk)
    - Visit England's 'Best Small Hotel' 2014, The Old Rectory Hotel, Martinhoe, Exmoor National Park (www.oldrectoryhotel.co.uk)
    - The Clive at Bromfield, near Ludlow in Shropshire (www.theclive.co.uk)
    - Tuddenham Mill, near Newmarket in Suffolk (www.tuddenhammill.co.uk)
    - Forest Side in the Lake District (www.theforestside.com)

- Award winning hotelier Simon Rhatigan is launching Helmsley Hospitality in 2017 as a new group of country house boutique hotels. He and wine merchant Simon Kershaw have secured venture capital funding to but existing hotels to refurbish, as well as build new hotels. Rhatigan already has several sites in the pipeline in the north and south of England.

- A more recent trend has been the opening of **private house hotels.** These are small country house and town house hotels which operate on a very informal basis, with no set meal times or menus. Guests are made to feel as though they are in their own home. They are free to wander into the hotel kitchen at any time. The first of this need breed of private house was the 8-bedrrom Foxhill Manor on the Farncombe Estate in the Cotswolds, opening in 2014. The Eden Hotel Collection opened the 10-bedroom Arden House along similar lines in November 2016, describing the hotel as a 'home from home', reflecting this trend away from a structured hotel environment to one with 'a laid-back atmosphere, more fluidity and choice for guests'.

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

    - Blue Ivy Hotel in Colchester (http://blueivyhotel.co.uk):
    - Greyfriars in Colchester (http://greyfriarscolchester.co.uk/);
    - One Warwick Park in Royal Tunbridge Wells (www.onewarwickpark.co.uk);
    - The George Hotel at Cranbrook (www.thegeorgehotelkent.co.uk);
    - The George in Rye, East Sussex (www.thegeorgeinrye.com);
    - The Northgate in Bury St Edmunds (www.thenorthgate.com);
    - Timbrell's Yard in Bradford-on-Avon (www.timbrellsyard.com)

- Some **regional boutique hotel chains** that are focusing on market town and rural locations have also emerged e.g. The Pig boutique hotel company with five hotels in the New Forest, Southampton, Studland Bay in Dorset, near Bath, and at Honiton in Devon; Milsom Hotels, which has 4 boutique hotels in Suffolk and Essex; Hillbrooke Hotels, which operates 4 'quirky luxury' hotels in the New Forest, Berkshire and Lincolnshire; Wildsmith Hotels, which has three hotels in the Lake District, including the Forest Side hotel at Grasmere, which the company opened in 2016 following a £4m renovation; and Flat Cap Hotels in Cheshire, which has one hotel in Holmes Chapel and is currently developing its second property in Cheshire.

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

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

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

- A number of **theme parks and visitor attractions have opened on-site hotels and other types of accommodation**. Examples include Legoland Windsor, Alton Towers, Chessington World of Adventures, Thorpe Park, Drayton Manor Park at Tamworth and Gulliver's Kingdom in Warrington. The West Midland Safari Park was granted planning permission in 2013 for a £20 million 250-bedroom hotel, 1,000 seater conference centre and indoor waterpark. Chester Zoo has plans for a 150-bedroom hotel. Cornwall's Eden Project has unveiled plans for an £8.5m, 109-bedroom hotel. The YHA opened a youth hostel at the attraction in 2014. Longleat has announced plans for a new 240-bedroom hotel on the estate with a water park and conference facilities. Alton Towers has continued to develop its accommodation offer, with the opening of the Enchanted Village fairytale-themed holiday lodge and treehouse complex in 2015, and plans for a 76-bedroom CBeebies Land Hotel as its third hotel alongside the Alton Towers Hotel and Splash Landings waterpark hotel. The Imperial War Museum in Cambridgeshire is currently undertaking work to identify a site for a hotel to add to the museum's visitor offer. Other accommodation developments at attractions include two safari tent encampments at Port Lympne Wild Animal Park in Kent and Medieval glamping sites at Warwick Castle and Leeds Castle in Kent. North Yorkshire's Lightwater Valley theme park is currently developing a holiday village with 106 log cabins. Chessington World of Adventures in Surrey launched a new Explorer Glamping encampment of 30 bell tents in 2016.

Inns/ Pub Accommodation

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

- There has been a growth in the supply of **boutique inns** in terms of the conversion of pub premises to gastropubs with boutique guest bedrooms. Examples are:
    - No 5 Bridge Street, Winchester (www.idealcollection.co.uk/no5bridgestreet)
    - The Lion & Pheasant, Shrewsbury (www.lionandpheasant.co.uk)
    - The Grasshopper Inn at Moorhouse on the Surrey/Kent border near Westerham (www.grasshopperinn.co.uk)
    - The Five All, Filkins, Gloucestershire (www.thefiveallsfilkins.co.uk);
    - The Lord Crewe Arms, Blanchland, Northumberland (www.lordcrewearmsblanchland.co.uk _
    - The Packhorse Inn, Moulton, Suffolk (www.thepackhorseinn.com);
    - The Bell at Ramsbury, Wiltshire (www.thebellramsbury.com);
    - The Victoria, Holkham, Norfolk (www.holkham.co.uk/victoria);
    - Royal Oak, East Lavant, near Chichester, West Sussex (www.royaloakeastlavant.co.uk);
    - Cromwell Arms, Mainstone, near Romsey in Hampshire (www.thecromwellarms.com);
    - The Wild Rabbit, Kingham, Cotswolds (www.thewildrabbit.co.uk);
    - The Hand and Flowers at Marlow in Buckinghamshire (www.thehandandflowers.co.uk);
    - The Pheasant at Gestingthorpe in Suffolk (www.thepheasant.net);
    - The Plough, Kelmscott, Oxfordshire (www.theploughinnkelmscott.com);
    - Inn on the Square, Keswick, Cumbria (www.innonthesquare.co.uk);
    - Woolpack Inn at Warehorne, near Ashford in Kent (http://woolpackinnwarehorne.com) – Alastair Sawday's Pub with Rooms 2016/17;
    - Swan House, Beccles, Suffolk (http://swan-house.com);
    - The Royal Oak, Swallowcliffe, Wiltshire (www.royaloakswallowcliffe.com) – 2017 Good Hotel Guide Newcomer of the Year
    - Howard Arms, Ilmington, Warwickshire (www.howardarms.com)

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

  - London-based brewer Young's operates 20 hotels and inns in London, Surrey, Hertfordshire and Wiltshire, including a number of boutique properties. It acquired the boutique Lamb at Hindon in Wiltshire in 2014 as part of the expansion of its hotel portfolio, and reopened The Greyhound in Carshalton, Surrey as a boutique inn in 2016.
  - The Coaching Inn Group has grown from two to twelve sites since launching in 2007 as the Bulldog Hotel Group. It acquired three coaching inns in 2015, including two in North Yorkshire, and a further two properties in 2016 in Berkshire and Cambridgeshire. The group is planning to expand to 15 sites over the next 5 years after receiving a £20m investment from the Commer Group in January 2015.

- A number of **regional pub accommodation companies** have developed in some parts of the country, acquiring and upgrading inns with rooms e.g. Sussex Pub Group; Cotswolds Inns & Hotels; Cozy Pubs in Essex; The Agellus Collection in Suffolk; The Chestnut Group and Anglian Country Inns in East Anglia; the Peach Pub Company across the Midlands; Oakman Inns & Restaurants with pubs and inns across Oxfordshire and Hertfordshire; Bedfordshire-based Epic Pubs; Miller's Collection, with three inns in Hampshire and Berkshire; The Inn Collection in the North East; Town & Village Hotels, which has two hotels in North Yorkshire, one in County Durham and one in Cheshire; Draco Pub Co in Somerset; 16 Hospitality in the North West and North Wales; Provenance Inn & Hotels in North Yorkshire; Ramblinns in Kent; Stay Original in the South West; and London-based pub company Faucet Inns, which has opened boutique inns in Southampton and Surrey. Oakman Inns has announced a multi-million pound expansion with the acquisition of The Royal Foresters in Ascot, Berkshire, the expansion of its Akeman flagship site in Tring, Hertfordshire, and plans to convert a nursing home in Olney, Buckinghamshire into an Oakman Inn. The London-based pub company Distinct Group acquired the Cromwell Hotel in Stevenage in December 2015, which it intends to reposition as a boutique hotel and gastropub. Cheltenham-based Lucky Onion acquired the Wild Duck in the village of Ewen in Gloucestershire in November 2015 to add to its No 131 The Promenade boutique hotel in Cheltenham and 14-bedroom Wheatsheaf Inn gourmet pub-restaurant with rooms in Northleach. 16 Hospitality has identified 21 locations in the North West and North Wales where it would like to acquire properties.

Restaurants with Rooms

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

- The Marquis at Alkham in Kent www.themarquisatalkham.co.uk
- The Bakery at Tatsfield on the Surrey/Kent border near Westerham www.thebakeryrestaurant.com
- JSW Restaurant in Petersfield, Hampshire www.jswrestaurant.com
- Mr Underhill's, Ludlow, Shropshire www.mr-underhills.co.uk
- The Whitebrook, near Monmouth in Wales www.thewhitebrook.co.uk
- The County, Aycliffe Village, County Durham www.thecountyaycliffevillage.com
- The Painswick in the Cotswolds town of Painswick www.thepainswick.co.uk
- Reads Restaurant with Rooms, Faversham, Kent (www.reads.com)
- White Vine House, Rye, East Sussex (www.whitevinehouse.co.uk)
- La Fosse, Cranborne, Dorset www.la-fosse.com

Country House Wedding & Events Venues with Accommodation

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

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

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

- AmaZing Venues has opened Stanbrook Abbey in Worcestershire in 2015 as a wedding and events venue with 52 luxury bedrooms and a private bridal suite (www.amazingvenues.co.uk/venue/stanbrook-abbey). The company operates 5 other luxury wedding and events venues in Scotland, Wales and Hampshire (www.amazingvenues.co.uk)
- Clevedon Hall in Somerset opened as a wedding and events venue in November 2014 following a £2m makeover. It has 25 luxury bedrooms and suites (www.clevedonhall.co.uk).
- The former Mariners Hotel at Millbridge, near Frensham in Surrey has been converted into the Millbridge Court wedding venue, offering 7 boutique hotel bedrooms for the exclusive use of wedding parties (www.millbridgecourt.co.uk)
- The former Mannings Heath Hotel, near Horsham in West Sussex was converted into the Brookfield Barn wedding venue in 2015 (www.brookfieldbarn.co.uk). It has 7 boutique guest bedrooms for the use of wedding parties.
- The Percy Arms Hotel in Otterburn in Northumberland is currently being converted into a French chateau inspired wedding venue – Le Petit Chateau (http://le-petit-chateau.com). Once complete the venue will be able to accommodate weddings of up to 160 guests, and will offer 30 guest bedrooms.
- The Cooling Castle Barn wedding venue near Rochester in Kent offers 15 luxury bedrooms for the use of wedding parties (www.coolingcastlebarn.com/page/accommodation)

Guest Houses and B&Bs

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

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

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

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

An interesting development is the opening of the Dursdale Farmhouse art-themed B&B on the site of the Hauser & Wirth art gallery in Somerset. The property has 6 bedrooms and features unique artworks forme Hauser & Wirth's artists, including a specially commissioned painted mural in the dining room.

Holiday Cottages

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

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

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

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

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

Examples of luxury holiday cottage complexes with leisure facilities include:

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

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

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

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

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

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

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

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

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

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

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

Examples include:

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

Holiday Lodges/ Holiday Lodge Parks

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

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

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

- The Dream Lodge Group (www.thedreamlodgegroup.co.uk) – 7 sites in East Sussex, Essex, Norfolk, Suffolk, Cambridgeshire, Devon and Cornwall, and an eight under development in Berkshire.
- Forest Holidays – part of the Forestry Commission (www.forestholidays.co.uk/choose-a-cabin) – offers Golden Oak Cabins at 9 sites in Scotland, Wales, Gloucestershire, Hampshire and Nottinghamshire. Its most recent development has been a complex of 60 cabins in Blackwood Forest.).Planning permission was secured in October 2013 for a development of 78 forest cabins in Delamere Forest in Cheshire.
- Natural Retreats (www.naturalretreats.co.uk)has developed eco lodge parks in the Yorkshire Dales and North Scotland and luxury holiday home developments in Cornwall and North Wales.
- Darinian Leisure Resorts (www.darinian.co.uk) has two holiday lodge parks in Essex and the Yorkshire Dales offering luxury, contemporary lodges for rental and ownership.
- Lodge Retreats (www.lodge-retreats.co.uk), part of Bourne Leisure, has 4 holiday lodge parks in the Lake District, Northumberland, East Yorkshire and Devon.
- Lancashire-based holiday park operator Pure Leisure Group (www.pureleisuregroup.com) operates the South Lakeland Leisure Village holiday lodge park and two golf lodge developments in Cambridgeshire and East Yorkshire alongside 6 caravan holiday home parks in the Southern Lake District, Northamptonshire and East Anglia, some of which also offer holiday lodges for ownership or rental.

Examples of recent and current holiday lodge park developments include:

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

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

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

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


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

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


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

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


Holiday Villages and Resorts

The fifth UK Center Parcs holiday village opened at Woburn Forest in Bedfordshire in June 2014. It has 625 holiday villas, a 75-bedroom hotel, an indoor sub-tropical swimming complex, a choice of on-site restaurants, a spa and a wide range of indoor and outdoor leisure and sports facilities. Developed at a cost of £250 million it has been one of the largest ever leisure projects in the UK. Center Parcs was granted planning permission in February 2016 for its first holiday village in Ireland. The €233m holiday village will include 470 lodges, 30 apartments and over 100 indoor and outdoor activities.

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

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

- The Lightwater Valley theme park near Ripon in North Yorkshire secured planning permission in 2013 for the development of a log cabin resort with 106 holiday units.
- Planning permission was granted in 2013 for the development of the Penrhos Leisure Village on the site of the former Anglesey Aluminium works near Holyhead. The scheme includes the development of 815 holiday lodges and cottages on two separate sites, together with a 75-bedroom hotel, an indoor sub-tropical swimming complex, spa, water sports centre and restaurants.
- Cornwall Council has granted planning consent for the redevelopment of the abandoned Spirit of the West theme park at St Columb into a luxury holiday resort with 325 rental holiday homes and an indoor leisure village with swimming pool, gym, restaurants and cafes. The plans, which also include a self-catering training academy, are being progressed by the owners of the Retallack Resort & Spa near Padstow.
- Planning consent has been granted to redevelop the 84.5 acre former Cookswood Quarry in the Mendip Hills in Somerset into a holiday village with 143 holiday chalets, a swimming pool and spa complex, restaurant, recreational lake, sports facilities and play areas. The site is currently being marketed for sale.

- Forestry Commission Scotland and Highlands & Islands Enterprise are planning to develop a £25million holiday resort next to Ben Nevis that will comprise a 5 star hotel and spa, a bunkhouse, up to 50 holiday lodges and a campsite.
- Plans were unveiled in January 2015 for the development of a £450m all-weather holiday resort at the site of Loudon Castle in Galston, East Ayrshire. The project includes 450 luxury lodges, 12 glamping units and a large indoor leisure complex with a sub-tropical pool and various sports facilities.
- In Derbyshire, plans have been unveiled for the £400m Peak Resort year-round holiday resort to be developed on a reclaimed opencast mining site in Chesterfield on the edge of the Peak District National Park. The plans include 600 holiday apartments, a hotel, hostel units, 250 woodland lodges alongside an 18-hole golf course, golf academy, sports centre, spa, conference centre, indoor adventure sports park, covered lawn games arena and bike tracks.
- In the South Downs National Park plans were unveiled in July 2015 for a £104million eco resort on the 118-acre site of the disused Shoreham Cement Works, to the north of Shoreham-on-Sea in West Sussex. The proposals include 600 eco-friendly holiday pods, an eco-hotel and conference centre, and a range of leisure attractions including natural swimming ponds, a watersports lake, rock climbing, high ropes course, mountain biking trails, an outdoor amphitheatre and Indoor auditorium for live performances and music festivals, and a range of cafes and restaurants. Plans have subsequently been unveiled in April 2016 for the development of an eco-village on the site, with 2,200 homes, office space, restaurants, shops, a visitor centre for the National Park and a range of community facilities.
- North Yorkshire attraction Flamingo Land is currently progressing plans for a £30m family-orientated leisure resort in the Loch Lomond & Trossachs National Park. Scottish Enterprise named the operator as its preferred developer for the project in October 2016. The masterplan for the site includes holiday lodges, a boutique hotel, hostel, glamping pods and a range of family attractions and restaurants.

Treehouses

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

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

Holiday Parks

The market for caravan holiday home parks remained relatively robust during the economic downturn, with relatively few holiday parks going into administration compared to other elements of the visitor accommodation sector such as hotels. However, the Credit Crunch did affect the sales of holiday parks, as despite market interest prospective buyers had difficulty in securing finance. The improved market conditions over the last three years and positive outlook going forward, together with the return of key lenders and interest in the sector from new investors has seen a significant upturn in holiday park sales and investment in 2015 and so far in 2016. All of the major holiday park operators have acquired additional holiday parks and invested heavily in them and their existing sites. Many smaller holiday park operators have expanded and invested. Many independent holiday park operators have also invested in their sites but with more limited access to commercial funding, investment in the independent holiday park sector has generally been at a slower pace. Some of the key improvements and investments that have been made include:

- The replacement of caravan holiday homes (both for ownership and hire) with new, larger, higher quality caravan holiday homes that include such features as double glazing, central heating, en-suite bathrooms, large lounge areas and outdoor decking areas and verandahs.
- New and up-graded leisure facilities including indoor pools, entertainment centres, indoor and outdoor sports, children's play areas, club houses, bars and restaurants.
- Layout improvements with cul-de-sacs replacing long rows, and larger plots with direct access, landscaping and private patios, resulting in lower density parks. This can however create commercial challenges for holiday park operators as it reduces total capacity. Many holiday parks are looking to expand their footprint to compensate for this.
- The introduction of luxury lodges for sale and/or rental, which are of a very high specification, with contemporary design and the latest technology.
- Environmental improvements, with better screening, the development of wildlife areas, recycling schemes and the use of solar power. Over 600 holiday parks now have the David Bellamy Conservation Award for nature and environmental conservation management.
- The conversion of touring caravan and camping pitches to caravan holiday home plots, as this is usually much more profitable for holiday parks.
- The introduction of glamping units e.g. safari tents, canvas cottages, bell tents, vintage caravans, and camping pods.

Investment activity by leading holiday park operators has been as follows:

- Bourne Leisure spent £55m on its portfolio of 36 Haven holiday parks during winter 2015/16. This included enhanced pools and entertainment complexes, new food and drink outlets, landscaping and infrastructure works, and new accommodation units. Bourne Leisure acquired two holiday parks in East Yorkshire from Flamborough Holidays in April 2015. It reopened one of them as the Haven Thornwick Bay Holiday Park in March 2016, following a £10m investment, which included a refurbished swimming pool complex, new restaurant, an activity barn and new play park.
- Park Holidays acquired holiday parks in Suffolk and Kent in 2014 and 2015. It has invested heavily in 2015/16 in the refurbishment of clubhouses, new swimming pools, and new and upgraded accommodation units, including luxury lodges. It has also reopened the Landscove Holiday Park at Brixham in Devon, following a complete refurbishment.
- Park Resorts has acquired seven holiday parks in the Lake District, North West and Lincolnshire. It invested £20m in 2015 in new bars and restaurants at four parks, new entertainment complexes at two sites, improved layouts at a number of parks, and the introduction of glamping cottages at its two holiday parks on the Isle of Wight.
- Parkdean Holidays has introduced 11 new, extra-wide, top-of-the-range caravan holiday home models across its 23 UK holiday parks, and new lodge units at two parks.
- Park Resorts and Parkdean Holidays merged in 2015 to become the UK's largest holiday park operator with 73 holiday parks.
- Pontins was acquired by Britannia Hotels in 2011. The company has since embarked on a multi-million-pound refurbishment programme to raise the standard of accommodation at the group's 6 holiday parks.
- Bridge Leisure Management completed a management buyout of Bridge Leisure Parks in 2015, with the support of Phoenix Equity Partners, acquiring a holiday park in Scotland at the same time. It acquired another holiday park in 2015, bringing its total portfolio to 9 caravan holiday home and holiday lodge parks across the UK.
- Best of British Holiday Parks has converted 11 of its 50 holiday parks to 'adults-only' parks.
- Family-run Hoburne Holiday Parks has completed its largest ever investment programme ahead of the 2016 season. A total of £6million has been spent across all seven of its holidays parks, which are located across South West England. Improvements have included new-look entertainment and leisure complexes at

three parks, brand new accommodation units at three parks, and free Wi-Fi across all parks.

- Away Resorts acquired the Cosways Holiday Park in Essex in April 2015, bringing its total portfolio of holiday parks up to five. The company is backed by private equity investor LDC. As part of its long term plan to invest in the development of all of its holiday parks, it is currently implementing a 3-year, £12m improvement plan at its Tattershall Lakes Holiday Park in Lincolnshire, which includes new caravan holiday home pitches, a major expansion of the park's bar and restaurant, and the introduction of various leisure facilities including adventure golf, an indoor activity marquee, a toddlers play area, and an outdoor wet play area. Away Resorts is also investing in its Whitecliff Bay Holiday Park on the Isle of Wight, with the introduction of additional caravan holiday home pitches and glamping units, including canvas cottages, bell tents and 1970s caravans.
- Weymouth holiday park operator Waterside Holiday Group, has introduced a number of new, larger luxury caravan and lodge models at its three 5 star holiday parks. This has included the development of a complex of luxury cedar-clad lodges at its park at Osmington. The group also has planning permission for a village of safari tents at its Waterside Holiday Park.
- Bunn Leisure completed a £17m beach nourishment and breakwater development coastal protection scheme in 2014 to help protect its 4 holiday parks on the Selsey Peninsula and support further investment in their improvement.

Whilst some holiday parks have expanded in response to the growth in demand for holiday home ownership and rental over the last 20 years, many are constrained by land availability, the ability to secure planning permission and flood risk, although there are examples of more positive approaches being adopted provided that adequate flood mitigation and evacuation measures can be introduced.

Mirroring the trend in other types of accommodation the holiday park sector is starting to see the emergence of **boutique holiday parks.** The 5 star holiday park operator Park Leisure has opened what it is calling the UK's first boutique holiday park – Oyster Bay in North Cornwall. It offers luxury caravan and lodge holiday homes, together with an on-site spa and leisure suite and a range of personal services including a fleet of chauffeur driven Mercedes Benz cars to take guests to local beaches and attractions. The group acquired its 12th holiday park in 2015 in North Wales. Hoseasons launched its Bouja luxury caravan breaks brand in 2015. It features holiday parks that offer boutique-style caravan holiday homes in stunning settings, each with its own hot tubs and packed with gadgets. Launching with 6 sites in Devon, Wales and

Hampshire, the Bouja brand expanded to 11 locations in 2016. Hoseasons is looking to work with further holiday parks that want to work with it as Bouja branded holiday parks..

Watersports Holiday Parks

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

- Tallington Lakes, near Stamford in Lincolnshire is a 205-acre site providing a series of lakes for water sports including water skiing, jet skiing, wakeboarding, dinghy sailing, canoeing and fishing. Other facilities include a dry ski slope, off-road karting, a climbing tower, an outdoor swimming pool, a children’s adventure playground and a restaurant and bar. Mature trees surround the site. In terms of accommodation, the site offers a range of 2 and 3-bedroom lakeside mobile homes to buy or rent and a touring caravan and camping site with 83 pitches. The park is currently developing a number of new luxury 2 and 3 bedroom lakeside lodges for sale and rental.
- Away Resorts' Tattershall Lakes Country Park is a 350-acre site set in woods located at Tattershall in Lincolnshire. The site has a 60-acre lake for water skiing and wake boarding and 4 fishing lakes. Other facilities include an 18-hole golf course, and indoor swimming pool, gym and spa, and a restaurant and bar. The park has around 200 privately owned static caravans, park homes and Swiss style log cabins and a small number of log cabins for rental. The park is gradually shifting over to park homes and log cabins as the demand for these types of unit increases and demand for static caravans reduces. More recently the site has added a canvas village of luxury bell tents.
- The Watermark Club at the Cotswold Water Park near Cirencester is the UK’s largest holiday lodge development. It comprises over 400 privately owned New England style lakeside holiday lodges around 6 lakes that have gradually been developed over the last 20 years. Each lake is unique and the holiday homes are individually designed and furnished. They range from one to four-bedroom holiday homes and lodges in a

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

Touring Caravan and Camping Sites

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

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

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

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

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

The Caravan Club is firmly committed to boosting its green credentials with a number of policy initiatives across its sites network, including using biodegradable and environmentally-friendly products, building with timber from sustainable sources, shredding tree prunings on site to use as mulch, and using low-energy lighting. The Club has made a major commitment to eco-friendly caravanning through a £1.8 million investment in its Poolsbrook Country Park Club site near Chesterfield in Derbyshire, including trialling a whole range of energy and water efficient technologies such as solar panels and photovoltaic cells, wind turbines, rain water harvesting and grey water recycling, geothermal energy and heat recovery ventilation systems, for possible roll out to other sites. The Club also has 43 sites that have signed up to its Boosting Biodiversity programme.
The other key development trend in the sector has been the **lengthening of the season** with many site operators now wanting to operate over a longer period and increasing numbers of sites looking to stay open throughout the year. The higher specifications of today's touring caravans and motor homes is resulting in growing numbers of owners wanting to use their caravans and motor homes throughout the year. Sites are increasingly investing in hard standing pitches to enable them to cater for this demand. Planning restrictions have not necessarily kept pace with this market demand, underpinned by concerns about permanent residential use and visual impact in the winter.

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

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

Camping Pods

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

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

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

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


Glamping

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

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

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

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

- **Lantern & Larks** (www.lanternandlarks.co.uk) operates in a similar way to Feather Down Farms in terms of supplying land owners with luxury safari tents and managing sales and marketing and bookings on their behalf. The company currently has 4 sites in the Forest of Bowland, Rutland, Somerset and the Suffolk Coast. It is looking for other land owners that it can work with to expand the brand.

- **Ready-pitched luxury camps:** Jolly Days Luxury Camping (www.jollydaysluxurycamping.co.uk) in North Yorkshire is a boutique campsite that offers the ultimate in luxury camping, with 8 large lodge tents with four poster beds, sofas and chandeliers, 7 vintage style tents and 7 bell tents. Shieling Holidays (www.shielingholidays.co.uk) on the Isle of Mull provides 16 fully equipped Shieling cottage tents, which take their name from the summer cottages that Highland shepherds traditionally use. The tents are equipped with proper beds and fully equipped kitchens and have electricity and gas heaters. Some also have shower and toilet facilities. Dandelion Hideaway (www.thedandelionhideaway.co.uk) in Leicestershire offers a number of canvas cottages. The Camping & Caravanning Club now offers Ready Camp glamping tents at 30 of its sites across the country (https://campingandcaravanningclub.co.uk/readycamp)

- **Yurts**, based on the Mongolian yurt, are wooden frame, insulated circular tents that are usually furnished with beds, wood burning stoves and kitchen equipment. The Bivouac (www.thebivouac.co.uk) on the Swinton Estate in the Yorkshire Dales has 8 yurts and six timber frame shacks. Each yurt sleeps 5 and comes with beds, bed linen, a terracotta cold store, wood burning stove and gas burner for outdoor cooking on a wooden veranda. Lincoln Yurts at Welton in Lincolnshire (www.lincolnyurts.com) offers 5 themed yurts that are fully equipped with beds, bedding, a gas stove, BBQ and decked seating area and supported by a bathroom cabin with a Jacuzzi bath. Other examples area Hidden Valley Yurts in Monmouthshire (www.hiddenvalleyyurts.co.uk), Yurtshire (www.yurtshire.co.uk) which has two yurt camps in North Yorkshire and one in Warwickshire, and Long Valley Yurts (www.luxury-yurt-holidays.co.uk), which has 4 sites in the Lake District and one in the Peak District.

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

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

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

- Other examples of luxury camping offers include:
  - **Geodesic domes** e.g. The Dome Garden (www.domegarden.co.uk) at Coleford in Gloucestershire has 10 geodesic ecodomes equipped with wood burning stoves, beds, private flushing toilets, a fully-equipped outside kitchen area with fridge and timber en-suite hot shower. Another example is Ekopod (www.ekopod.co.uk) in Cornwall.
  - **Persian alachigh tents** , similar to yurts e.g. Penhein Glamping near Chepstow in Monmouthshire (www.penhein.co.uk)
  - **Gypsy caravans** e.g. Gypsy Caravan Breaks in Somerset (www.gypsycaravanbreaks.co.uk) and Roulotte Retreat in the Scottish Borders (www.roulotteretreat.com), which has 4 French roulette gypsy caravans for hire.
  - **Retro caravans** e.g. Vintage Vacations on the Isle of Wight (www.vintagevacations.co.uk), which has a collection of 13 vintage American Airstream and Spartan caravans for hire; Happy Days Retro in East Dorset (www.happydaysrv.co.uk) with 4 airstream caravans available for hire for holidays; and Mad Dogs and Vintage Vans in Herefordshire (www.maddogsandvintagevans.co.uk), which has 4 vintage caravans.
  - **Shepherds Huts** e.g. Herdy Huts in the Lake District (www.herdyhuts.co.uk) and Shepherds Huts South East (www.shepherdshuts-southeast.com) in Kent.
  - **Safari Tents** e.g. Port Lympne Wild Animal Park in Kent (www.aspinallfoundation.org/short-breaks) has developed two safari tent encampments - Livingstone Lodge and Elephant Lodge overlooking the elephant paddocks, and the Camping and Caravanning Club has 4 safari tents for hire at its club site at Gulliver's Kingdom theme park at Milton Keynes and one at its club site at Teversal in Nottinghamshire. (www.campingandcaravanningclub.co.uk/ukcampsites/club-glamping/safari-tents/). Another example is A Little Bit of Rough at Uppingham in Rutland (www.alittlebitofrough.co.uk)

- **Medieval Glamping** e.g. Warwick Castle has 41 ready-to-bed medieval-themed tents and guests are served breakfast at medieval-styled tables in a banqueting tent. They are also offered medieval-themed evening entertainment, including archery, a jester's school and knight's school and medieval games (www.warwick-castle.com/accommodation/mediaeval-glamping-at-warwick-castle.aspx). Leeds Castle in Kent offers 8 striped canvas pavilions based on a medieval design as its Knight's Glamping site (www.leeds-castle.com/Accommodation/Knight%92s+Glamping)
- **Tree camping** in tents and structures suspended in trees e.g. Red Kite Tree Tent in Mid Wales (www.sheepskinlife.com/relax-at/red-kite-tree-tent), The Tree Tent at The Secret Campsite in East Sussex (www.thesecretcampsite.co.uk/secret-shelters), and Treehotel in Sweden (www.treehotel.se), which features 5 quirky, individually designed 'treerooms' and a tree sauna.

- **Bubble camping** in transparent inflatable tents was introduced in France in 2010 but has yet to come to the UK (www.bubblecabins.com)
- **VW camper van pop-up camps** e.g. Volkswagen Commercial Vehicles partnered with booking website LateRooms in 2014 to provide 6 VW California camper vans for hire on a nightly basis at Temple Island in Henley-on-Thames
- **Cargo pods**, converted from shipping containers have been introduced at the Lee Wick Farm glamping and touring site at St Osyth, near Clacton-on-Sea in Essex (www.leewickfarm.co.uk).

- **Converted train carriages** e.g. Long Hill Carriage at Cucklington in Somerset is a restored 1882 Great Western Railway carriage that provides a living space and kitchen alongside an en-suite double bedroom in an adjacent converted 1950s goods wagon (www.longhillcarriage.co.uk)
- **Converted lorries** e.g. Cedar Valley in the Meon Valley in Hampshire offers a converted horse lorry as a glamping unit sleeping 3 people, alongside safari tents, a yurt and a campsite (www.cedarvalley.co.uk/betty/about-betty)
- **Champing** (camping in a church) - the Churches Conservation Trust offers champing at four of its churches in Kent, Cambridgeshire and Northamptonshire. Guests enjoy a full breakfast delivered to the church in the morning, made using local produce. The Trust also arranges activities for champing guests, including walks, canoe trips, storytelling and meditation (www.visitchurches.org.uk/champing).

Youth Hostels

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

Luxury Hostels

A trend in major European and UK cities is the development of luxury hostels or 'poshtels'. These provide low-priced accommodation featuring stylish/hip interior design, en-suite bedrooms and dormitories with good quality beds, high quality food and beverage offers, free Wi-Fi, and relaxing lounge areas for socialising. A number of luxury hostel chains have started develop in the UK, including Euro Hostels (hostels in Edinburgh, Glasgow, Newcastle and Liverpool), European luxury hostel operators Generator and Wombat's (with a hostel each in London), Safestay (hostels in London, Edinburgh and York), and St Christopher's Inns (hostels in London, Edinburgh, Bath, Cardiff and Newquay). Amsterdam-based The Student Hotel is planning to open hostels in the UK in cities such as London Edinburgh and Brighton. A number of independent luxury hostels have opened in some cities, including Smart City Hostel (Edinburgh), The Safehouse Hostel (Cardiff), Igloo Hybrid (Nottingham), Clink (London), and The Dictionary (London Shoreditch). In Leeds, the Art Hostel opened in 2016. It features individual artist-designed bedrooms and dormitories, and a workspace where visiting artists create new work, which guests and the general public can engage with.

Children's Activity Holiday Centres

The children's activity holiday centre sector is rapidly expanding in the UK and is identified as having good potential for further expansion[9]. The sector is made up of many different operators, from those with multiple centres across several countries to smaller, family-run independents. Centres range in size from 50 to 900 beds and are operated largely by the private sector but also by local authorities and charitable organisations.

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

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

a multi-sports area. Existing lakes are used for canoeing and raft building. The centre has created 130 jobs. PGL also opened a new holiday centre at Liddington, near Swindon in 2010 through the conversion of the former Liddington Hotel. It can accommodate up to 1,000 children and employs 250 staff. Kingswood is currently looking for a site for a new centre in the Oxfordshire/Berkshire/Buckinghamshire/Wiltshire area/

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

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

Wellness Retreats

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

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

APPENDIX 13

PUBLIC SECTOR FUNDING OF HOTEL DEVELOPMENT SCHEMES IN THE UK

1. Introduction

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

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

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

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

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

2. Local Authority Borrowing at Preferential Interest Rates

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

Travelodge Partnerships with Local Authorities

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

Pullman Hotel, Liverpool

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

Crowne Plaza Newcastle

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

Hilton Ageas Bowl, Hampshire

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

Lancashire County Cricket Club 4 Star Hotel

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

Stockport Exchange

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

3. Grants for Hotel Projects

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

Welsh Government Tourism Investment Support Scheme (TISS)

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

Highlands & Islands Enterprise

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

Titanic Hotel, Liverpool

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

Premier Inn Blackburn

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

Hampton by Hilton Humberside Airport

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

Belfast Titanic Hotel

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

Buxton Crescent Hotel

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

4. Local Authority Freehold Purchase

Aloft Liverpool

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