

MONMOUTHSHIRE TOURIST ACCOMMODATION DEVELOPMENT OPPORTUNITIES

Final Report

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Monmouthshire County Council
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APPENDICES

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1. INTRODUCTION

1.1 Background to the Study

1.1.1. Monmouthshire County Council's new Destination Development Plan and Tourism Marketing Strategy focus largely on boosting staying visits to Monmouthshire in order to maximise the economic benefits from tourism growth in the county: staying visitors spend considerably more than day visitors and are thus the key focus for the County Council. Developing staying tourism will require the continued development and expansion of Monmouthshire's tourist accommodation supply.

1.1.2. The Monmouthshire Visitor Product Assessment undertaken in October and November 2011 by TEAM Tourism identified some strengths in Monmouthshire's tourist accommodation offer in terms of:

- The county's stock of 4 and 5 star self-catering properties;
- Some high quality hotels in the county and high quality B&Bs;
- The county's award winning 5 star restaurants with rooms;
- A good stock of touring caravan and camping sites.

1.1.3. The assessment also identified some weaknesses in terms of the quality of some of the county's hotels and inns and the lack of hotel accommodation in Monmouth and Chepstow and suggested that there are opportunities for the further development of Monmouthshire's tourist accommodation offer.

1.1.4. Improving and further developing the county's accommodation product to address current quality deficiencies and capitalise on the opportunities for developing new high quality accommodation businesses is identified as a product development priority for the next three years.

1.1.5. The Monmouthshire Destination Development Plan includes a Tourist Accommodation Development Programme, which identifies a need for research to assess tourist accommodation development opportunities in the county as a key first step. With funding support from Capital Region Tourism, Monmouthshire County Council has thus commissioned Hotel Solutions to undertake a programme of research to scope out what these opportunities could be and what sort of interventions may be needed from the County Council and its partners to fully capitalise on the opportunities.

1.2 Scope of the Research

1.2.1 The research has included the following key elements:

- A brief review of the planning policy and strategy context for tourist accommodation development in Monmouthshire.
- An analysis of the accommodation stock information currently held by Monmouthshire County Council.
- Internet research to gain an insight into the nature and quality of some of Monmouthshire's tourist accommodation businesses.
- A review of information provided by the County Council's Planning Department on planning applications for tourist accommodation development projects.
- A review of national accommodation development trends in the UK based on recent consultancy assignments that Hotel Solutions has completed for other UK destinations, including County Durham, Kent, East Sussex and Bedfordshire.
- Internet research to identify relevant examples of the types of tourist accommodation for which there could be development potential in Monmouthshire.

1.2.2 We had also intended to review available research information on tourist accommodation performance and market demand in Monmouthshire but were unable to identify any useable research to enable us to do so.

1.3 Structure of the Report

1.3.1. The report comprises an initial chapter setting out the current planning policy and strategic context for tourist accommodation development in Monmouthshire. This is followed by chapters on the following types of tourist accommodation:

- Hotels;
- Inns and Restaurants with Rooms;
- Guest Houses and B&Bs;
- Holiday Cottages
- Canal Boats
- Holiday Lodges and Holiday Lodge Parks
- Caravan Holiday Home Parks
- Touring Caravan & Camping Sites
- Luxury Camping
- Group and youth accommodation.

2.3.2 For each type of accommodation the chapters set out our analysis of the current and proposed future supply of accommodation in Monmouthshire; our assessment of national development trends; and our conclusions regarding the potential opportunities in Monmouthshire.

1.7.2. The final chapter of the report provides a summary of the identified tourist accommodation development opportunities in Monmouthshire and a list of suggested public sector interventions that could be undertaken to capitalise on the opportunities.

2. THE STRATEGIC, POLICY & MARKET FRAMEWORK

2.1. The Strategic Investment Policy Context

Visit Wales Investment Strategy – Tourism Sector Priorities

2.1.1. Visit Wales has drawn up a framework for the development of the tourism industry in Wales, 'Achieving Our Potential'. It sets out a vision for the industry, which will require an investment strategy to deliver. The purpose of the Tourism Investment Strategy is to prioritise investment in the tourism industry and identify work programmes for Visit Wales that will promote sustainable tourist development. The strategy runs to 2013, but is intended to be organic, regularly reviewed to adapt to and reflect changes in the market. Its conclusions have been based on investigating trends, the size and profile of the sectors, and historic investment in the industry.

2.1.2 The sector priorities relating to visitor accommodation include:

- Serviced accommodation
 - Investment in new and existing serviced accommodation linked to business tourism, activity tourism, golf courses, boutique & food related offers, Wales' coastal resorts, the Wales Coast Path, and Strategic Regeneration Areas;
 - A focus on destination hotel sites that can make a difference, including brands, boutique, spa and food related products;
 - A focus on hotels that build on Wales' distinctiveness and have a strong sense of place;
 - Bedroom standards to be at least 4 star for hotels; high 4/5 star for B&Bs, guest houses and restaurants with rooms;
 - Improvements to profitability and productivity.

- Self-catering
 - New development only where significant additional business can be generated. Schemes with links to growth target activity markets will be prioritised;
 - Other exceptional circumstances for new capacity include:
 - Extensions to existing complexes, where there are at least 3 units in place;
 - The addition of self-catering to existing broader businesses e.g. hotels;
 - Where proposals include exceptional leisure;
 - Where a unique outcome is proposed e.g. tree house accommodation;
 - Investments that can help improve occupancy and extend the season e.g. spas, leisure, central amenities at 4 and 5 star complexes;

- Caravan and camping
 - Support for camping and touring caravan parks linked to key activity, cultural and heritage products;
 - Improvements to visual layout of camping and touring caravan sites, especially in coastal and quality landscape settings;
 - Landscaping improvements to static caravan parks;
 - The achievement of at least 4 star standard on completion;
 - The purchase of yurts, tipis, wooden tents and vintage caravans as part of a hire fleet may be eligible.

2.1.2 Sixteen possible project investment options are identified: those with a visitor accommodation component are:

- Provision of new high quality hotel accommodation linked to business or golf tourism;
- Refurbishment/up-grading to a mid-market hotel
- Provision of a boutique hotel
- Creation of a new high quality B&B
- High quality refurbishment to a Guest House
- Development of central facilities at a self-catering complex
- Development of new self-catering units
- Provision of camping facilities
- Development of bunkhouse/activity centre

2.1.4 An analysis of types of project against market fit and economic benefit pulls out a 'top five' key investment priorities – high quality hotels linked to business & golf, boutique hotels and bunkhouse accommodation feature in this top 5.

Tourism Investment Support Scheme (TISS)

2.1.5 Financial assistance is available in Wales to eligible tourism operators and developers who undertake investment that is in line with the identified priorities under TISS (as identified in the national investment strategy above). New and existing businesses can apply. The focus is very much on projects that will stimulate increased demand from new and existing markets, improve the quality of the offer and develop distinctiveness, as well as encouraging investment in businesses and facilities with the potential for high growth and profitability that will add value to and not displace existing markets. Support of between £5000 and £500,000 may be available, usually up to 25% of eligible costs. Up to 25% this will normally be in the form of a grant. For larger investments the support may be repayable. The purchase of timber lodges and caravan holiday homes is not eligible.

2.2 Tourism Strategy for Monmouthshire

Monmouthshire Visitor Product Assessment

2.2.1 The Monmouthshire Visitor Product Assessment undertaken by TEAM Tourism in October and November 2011 as part of the process of developing the Monmouthshire Destination Development Plan identified the following strengths and weaknesses in Monmouthshire's tourist accommodation offer:

- A good stock of high quality self-catering accommodation – a lot of 4 and 5 star properties;
- Some good quality hotels;
- Some high quality B&Bs and farmhouse B&Bs;
- Some high quality pub accommodation and award winning restaurants with rooms;
- A good stock of touring caravan and camping sites;
- Only 40% of accommodation establishments are officially graded;
- A number of poor quality hotels and pub accommodation establishments - particularly in Monmouth, Chepstow, Abergavenny and Tintern ;
- No real luxury camping offer.

2.2.2 In terms of tourist accommodation product development requirements and opportunities the Assessment identified the following:

- A need for investment in a number of hotels and pub accommodation establishments.
- Opportunities for:
 - Boutique hotels – repositioning existing hotels and inns and possible conversion of suitable buildings where available;
 - Country house hotels given suitable properties for conversion;
 - Spa hotels – given suitable properties for conversion;
 - Good quality pub accommodation;
 - New B&Bs – need to be constantly encouraged given the churn factor in this sector;
 - Budget hotels in Monmouth, Chepstow and Abergavenny;

- o Golf hotels;
 - o Golf lodges;
 - o Fishing lodges;
 - o Holiday lodge parks – if suitably screened/ in woodland settings;
 - o Luxury camping;
 - o Campsites, camping pods, camping barns and hostels – linked to long distance walks and cycle routes + canoeing in the Wye Valley and adventure activities in the Brecon Beacons;
 - o Activity holiday centres – given suitable properties for conversion.
- Potential for good quality hotels to develop spa facilities;
 - Plans by British Waterways and the Forestry Commission for an eco-friendly log cabin accommodation project at Goytre Wharf.

Monmouthshire Destination Development Plan

2.2.3 The Monmouthshire Destination Development Plan 2012-2015 (TEAM, April 2012) seeks to establish a framework for public, private and voluntary sector partnership working to improve and develop Monmouthshire's visitor product. The area's strengths are identified as stunning landscape, high profile walking routes, facilities for outdoor activities (golf, fishing, canoeing), heritage sites (WHS, Tintern Abbey), an award winning food and drink offer, some strong festivals and events venues and good access.

2.2.4 One of the 7 Destination Development Programmes identified is for the development of the tourist accommodation sector, with the aim of pro-actively encouraging and supporting investment in the improvement and further development of the accommodation offer. Key tasks include:

- Preparation of materials to support investment promotion and inform the Council's planning and property teams, identifying opportunities and best practice examples;
- Identification of hotels and inns needing investment;
- Identifying sites and buildings for accommodation development;
- Accommodation development workshops;
- Targeted approaches to local, regional and national hotel and visitor accommodation developers and operators, property developers, pub companies, farmers, landowners, golf clubs and commercial property agents;
- Facilitation of funding for development;
- Quality awareness days to promote the uptake of quality grading.

Monmouthshire Brand & Destination Marketing Review

2.2.5 The Monmouthshire Brand & Destination Marketing Review undertaken by Arkenford and Yellow Railroad in March 2012 identifies the most potentially productive visitor market segments for Monmouthshire as:

- Walkers;
- 'Foodies' coming for short breaks;
- Families coming to undertake activities in the Forest of Dean and Brecon Beacons;
- Anglers (Usk and Wye Valleys).

2.2.6 In terms of their profile these markets are identified as older age groups and empty nesters (for the shoulder season) and families (for the main season).

2.2.7 Key Arkleisure segments for the county are identified as:

- Cosmopolitans;
- Discoverers;
- Functionals;
- Traditionals.

2.2.8 Discoverers, Functionals and Traditionals are segments that rate functionality over style as a purchase driver and look for good service and value for money. In terms of their accommodation requirements they are most likely to be looking for good quality, reasonably-price and traditional types of accommodation. Cosmopolitans are more confident and stylish and willing to try new things, so may be interested in more contemporary accommodation offers.

2.2.9 The recommended tourism marketing strategy for Monmouthshire is for the County Council to:

- Work with a newly established Monmouthshire Food Tourism Consortium to promote Monmouthshire as a 'foodie' destination using the strap line of 'Food Capital of Wales', and;
- Promote the relevant parts of the county under the 'Brecon Beacons' and 'Wye Valley & Forest of Dean' destination brands by supporting and working through Brecon Beacons Tourism and the Wye Valley & Forest of Dean Tourist Association.

Sustainable Tourism Strategy for the Brecon Beacons 2012-2016

2.2.10 The Sustainable Tourism Strategy for the Brecon Beacons 2012-2016, produced by The Tourism Company in 2011, includes a specific action point (6.6) relating to encouraging investment in new or improved tourist accommodation (and attractions and services) in line with market opportunities, gaps and sustainability principles. The proposed general approach is to seek continuous improvement in the quality of the Brecon Beacons accommodation offer in all aspects. This is seen as primarily taking place through investment in existing properties although some new provision is also envisaged, through conversions or appropriate new build. While no major gaps are identified, accommodation development opportunities are suggested as follows:

- More hotels and guest houses that offer a really high quality experience;
- New forms of environmentally friendly accommodation that provide a strong experience of nature e.g. high quality camping, small eco-units;
- General improvement in camping and caravan sites;
- Investment in facilities in accommodation to meet the needs of walkers, cyclists and other activities;
- Investment in environmental capital in accommodation e.g. levels of insulation, renewable energy sources, rainwater harvesting.

2.2.11 Actions to encourage investment include:

- Providing existing enterprises and enquirers with information about the range of financial assistance available;
- Supporting feasibility studies and pilot projects as appropriate;
- Providing any available relevant data and knowledge on markets to potential investors;
- Holding a workshop on tourism investment opportunities bringing together enterprises, landowners, funding bodies and planners.

2.2.12 The Strategy also includes an action point for developing the Brecon Beacons as the primary destination for horse riding in Wales, which includes an action about encouraging more accommodation to cater for horse riders.

2.2.13 The Strategy also includes support for the implementation of the Master Plan for Goytre Wharf, which we understand includes a proposed eco-friendly log cabin self-catering development.

Wye Valley AONB Sustainable Tourism Strategy 2011-2016

2.2.14 The Wye Valley AONB Sustainable Tourism Strategy 2011-2016 produced by The Tourism Company in 2012 includes a number of specific action points relating to tourist accommodation development in the AONB in terms of:

- Investigating gaps in accommodation, including camping, and facilities such as water points, to identify new opportunities for business or service development on long distance routes;
- Supporting accommodation businesses to become cycle-friendly;
- Seeking suitable sites for camping or other simple accommodation with easy access from the river for canoeists and other users;
- Encouraging more businesses in locations where riding is available to consider welcoming riders and horses.

2.2.15 The Strategy also includes a specific action programme for restoring Tintern as the 'jewel in the crown' of the Wye Valley. This focuses on reconnecting, refreshing and remodelling the village and its visitor experience. No specific comments or recommendations are made about its accommodation offer.

2.2.16 The Strategy also includes an action as part of the F4 action programme under 'Raising Quality' for promoting identified business opportunities and engaging with local developers about gaps in provision. This presumably includes accommodation investment opportunities.

South East Wales Strategic Tourism Framework

2.2.17 The South East Wales Strategic Tourism Framework produced in August 2008 by Blue Sail for Capital Region Tourism identified 'shifting demand towards higher quality accommodation' and 'still a significant level of relatively poor and indifferent quality accommodation' in the Region. The Framework makes a recommendation to 'stimulate business investment to improve quality and increase capacity in line with market demand' but makes no suggestions as to how this might be achieved.

Seven for Severnside

2.2.18 The 'Seven for Severnside' development plan for Severnside includes a 'Welcome to Severnside' project to maximise the area's strategic position as the entry point to Monmouthshire and Wales, improve the area's visitor offer and stimulate tourism service business and job creation. It focuses on:

- Capitalising on the Wales Coast Path;
- The development of Caldicot Castle & Country Park;
- The possible development of a Festival of the Coast;
- The possible development of a landmark arrival structure;
- Improvement of Magor Services.

2.2.19 The 'Welcome to Severnside' project also includes targeted business support aimed at existing and emerging visitor services businesses to raise awareness of opportunities and support funding applications for accommodation improvement.

Abergavenny Sustainable Tourism Action Plan

2.2.20 The Abergavenny Sustainable Tourism Action Plan was developed in July 2010 by consultant Alison Caffyn working with/through the Abergavenny & District Tourism Association with the support of the Collabor8 Programme and Brecon Beacons National Park. The Action Plan makes no reference to tourist accommodation development requirements in the town.

Wales Tourism Alliance – Visitor Survey 2012

2.2.21 The Wales Tourism Alliance's 2012 Visitor Survey, conducted by Wavehill and reported in November 2012, shows high quality accommodation as the second most important element of a break or holiday in Wales for visitors, after interesting and high quality attractions/events/places to visit. The survey also identified problems with accommodation as the most commonly cited area of visitor disappointment after the weather. 9.2% of visitors surveyed identified problems with accommodation as the thing that had disappointed them most about their trip to Wales, while 22.1% stated that their accommodation was the second worst thing that they had experienced on their trip. Key aspects of accommodation that visitors felt could be improved were:

- Better equipped holiday cottages
- Attention to detail
- Refurbishment/ updating – a key comment was that accommodation was tired/drab.

2.3 Monmouthshire Tourist Accommodation Planning Policy

Monmouthshire Unitary Development Plan

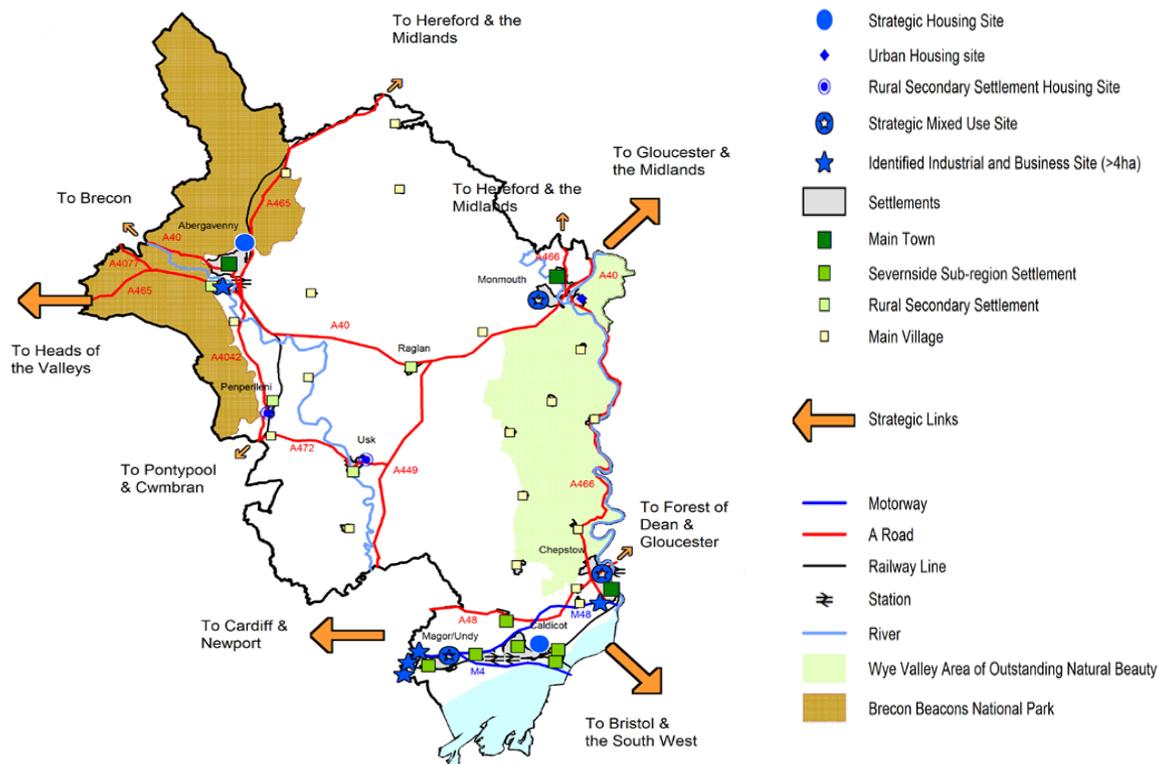
2.3.1. The Adopted Planning Policy document for Monmouthshire is the Unitary Development Plan (June 2006). This remains in place until the Local Development Plan is adopted. It includes a chapter on Tourism, emphasising economic benefits and the need to manage impact. It acknowledges Monmouthshire's position as gateway to Wales, its heritage, beautiful scenery, historic market towns and appeal to short break holiday markets. A shortage of visitor accommodation and a lack of range is identified. Policies include:

- T1 – Encouraging sustainable tourism - proposals with a negative impact will not be permitted, but those that improve access and enhance tourism assets and their settings will be;
- T2 – Visitor accommodation within settlements – is permissive of new hotels, inns, guesthouses and self-catering accommodation as well as extensions and up-grading. A site is identified for hotel development at Monmouth (Dixton). The need for new accommodation in Monmouth, Chepstow and Abergavenny is identified;
- T3 – Visitor accommodation outside settlements – opportunities are identified at 4 locations – Hendre Mansion, Portal Rd and Croft-y-Bwla at Monmouth, and Piercefield House at Chepstow. New build self-catering is permitted as ancillary to hotels and where buildings are re-used, allowing for minor extensions;
- T4 – New tourist facilities – is essentially about activity centres and attractions, again focused on re-using buildings in the countryside, and farm diversification. It is not clear whether an accommodation component would be permissible under this policy;
- T5 – Touring Caravan and Tented Camping Sites – focuses on controlling visual impact and does not permit permanent caravans or warden accommodation.

Monmouthshire Local Development Plan

2.3.2 Monmouthshire is currently in the process of preparing a replacement planning policy framework, the Monmouthshire Local Development Plan (Deposit Plan, September 2011). The key diagram below summarises the spatial strategy, with the focus for development on the main towns of Monmouth, Chepstow and Abergavenny, but some development related to regeneration activity at Severnside (Gateway to Wales) and an appropriate level of development in rural areas.

Monmouthshire Spatial Strategy - Key Diagram



2.3.3. Tourism is a key issue for Monmouthshire, and policies dealt with as part of promoting a sustainable economy. There are 3 proposed policies relating to the visitor economy covering touring caravan and tented camping sites, visitor accommodation outside settlements, and golf courses.

- Policy T1 – Touring Caravan and Tented Camping Sites
 - Concerns here focus on visual impact on landscape and limiting use to short term tourists;
 - The policy covers new sites and the extension of existing sites;
 - Permanently sited caravans are not permitted;
 - Supervision must be possible without permanent warden accommodation;
 - Traffic and access impact is also considered.

- Policy T2 – Visitor Accommodation outside Settlements
 - The rationale behind this policy is to ensure the development needed to make the county a competitive tourist destination is not at the expense of its environment, therefore requiring careful management in the countryside;
 - New build serviced and self-catering accommodation outside settlements as ancillary to established medium and large hotels;
 - Otherwise it will be limited to the re-use and conversion of existing buildings;
 - Exceptions include farm buildings for diversification and buildings not suitable for permanent residential conversion;
 - Occupancy conditions will apply to ensure short stay tourism use.

- Policy T3 – Golf Courses
 - This policy is also concerned with minimising landscape impact;
 - Clubhouses/associated facilities should ideally involve conversion of existing buildings with limited new development;
 - Consideration will be given to visitor accommodation though likely scale is not indicated.

2.3.4. We offer a number of comments on the policies as they stand:

- There is no specific permissive hotel policy that articulates what the Council would like to see and where, though presumably development in main settlements will be permitted;
- There is no hotel retention policy or policy seeking to retain other forms of visitor accommodation;
- Holiday parks i.e. static caravans are not covered by the current policies;
- Holiday lodge parks are also not covered, even though they may be let to holidaymakers and not owner occupied;
- Luxury camping is not specifically mentioned;
- Camping pods or wooden tents are not covered and presumably wouldn't be allowed under the current touring caravan/camping policy;
- Warden accommodation is often needed on sites for security and management reasons;
- There is no reference to the provision of amenities on caravan and self-catering complex sites, which would help extend the season;
- Pub accommodation isn't mentioned e.g. an extension to a rural pub to provide bedrooms;
- PGL style residential activity centres are not covered and may well not be permitted under these policies, unless they re-use an existing building, and additional build wouldn't appear to be supported;
- Small numbers of lodges associated with activities e.g. Fishing lodges may well not be covered e.g. if built off-site;
- Seasonal occupancy conditions can restrict the ability of owners to extend the season and respond to market demand for off-peak stays.

2.3.5 Site Allocation policies do include 4 tourism sites, identified for new visitor accommodation:

- Hendre Mansion, Monmouth – for new build hotel or conversion and new build self-catering;
- Piercefield House, Chepstow – for conversion to hotel and other serviced accommodation;
- Croft-y-Bwla, Monmouth – for new build hotel;
- Portal Road, Monmouth – for new build hotel.

Brecon Beacons National Park Local Development Plan

2.3.6 Within the Brecon Beacons National Park, the National Park Authority is the planning authority. The Local Development Plan, which covers the period 2007-2022, is at Draft Deposit stage. The special qualities of the Park and its conservation are their priority. In relation to tourism the objective is to support a sustainable tourism industry that contributes to the public's enjoyment of the National Park. Tourism is also seen as an important component in the local economy.

2.3.7 Policies seek to reflect the NPAs Sustainable Tourism Strategy (2007) which identifies tourism as one of the foremost means to foster social and economic well-being through boosting the economy with tourist spend, providing year round employment, helping sustain local facilities, and creating positive images of the Park.

- Policy SP14 – Sustainable Tourism – looks to enable proposals for sustainable tourism development which promote opportunities for the enjoyment and understanding of the Park;

- Policy 27 – New Build Tourist Accommodation – including hotels, hostels, guest houses
 - Permits developments on sites not suited for permanent housing, restricted by planning conditions to tourism use;
 - Permits development in settlements;
 - Permits development in the countryside in exceptional circumstances – farm based tourism and the conversion of rural buildings;

- Policy 28 – Non-Permanent Holiday Accommodation e.g. caravans, chalet complexes, yurts
 - Impact on the landscape especially in the winter is a key concern;
 - New sites for static holiday caravans and chalet complexes are considered only suitable in exceptional circumstances;
 - Low impact development such as yurts and tree houses will be more favourably considered;
 - Central facilities should ideally be provided by converting existing buildings;
 - Sites should be for tourism use only and with seasonal opening restrictions;
 - Supplementary guidance is to be prepared on the types of non-permanent accommodation that is acceptable;

- Policy 29 – New or Extended Sites for Touring Caravans, Campervans and Tents
 - These policies relate to permanent sites occupied by transitory accommodation;;
 - Seasonal occupancy conditions apply;
 - On site facilities should use existing buildings;
 - Sites must be well integrated into the landscape.

- Policy 30 – New or Extended Outdoor Activity Centres
 - New activity centres will need to be within a settlement, using an existing building, or if in the countryside to have no detrimental impact;
 - Activities will be managed via legal agreement.

2.4 Policy Constraints on Development

2.4.1 Monmouthshire is a largely rural county and has major landscape resources, including internationally and nationally designated landscapes and built heritage. These include:

- The Brecon Beacons National Park
- Wye Valley AONB
- Blaenavon Industrial World Heritage Site
- Four Special Landscape Areas that account for 55% of the county
- Extensive tracts of good quality agricultural land
- Major biodiversity and nature conservation resources e.g. SSSIs and Nature Reserves
- Built heritage and historic environment designations, including Conservation Areas, Scheduled Ancient Monuments, Historic Parks & Gardens

2.4.2 In addition, flooding affects the Gwent Levels and the flood plains of the Rivers Usk and Wye and their tributaries. There is also an area of Green Belt, between the settlements of Chepstow, Pwllmeyric and Mathern.

2.4.3 Clearly, Monmouthshire is a very sensitive area requiring careful management which will necessarily put some constraints on development. How to do so in a way that will enable the county also to foster tourism growth and enable its further development and associated economic and social benefits remains a key challenge.

3. HOTELS

3.1. Current Hotel Supply

3.1.1 There are 16 hotels in Monmouthshire with a total of 626 letting bedrooms and 1,650 bedspaces, accounting for 59% of the county's total supply of serviced accommodation (see Appendix 1).

MONMOUTHSHIRE – HOTEL SUPPLY – DECEMBER 2012

Standard/ Type	Hotels	Bedrooms	Bedspaces
4 star	2	169	338
3 star	7	287	875
2 star	2	40	84
Budget	2	86	264
Not graded	3	44	89
Total	16	626	1650

3.1.2 The county's current hotel stock comprises a mix of different standards of hotel. The county has one large branded 4 star golf hotel (the Marriott St Pierre) and one 4 star country house hotel (Llansantfraedd Court). It has seven 3 star hotels, spread across the county, two of which are members of the Best Western Hotels marketing consortium. Monmouthshire has two Travelodge branded budget hotels. There are no boutique hotels currently in Monmouthshire.

3.1.3 The county's hotels are predominantly small in scale – typically offering around 20-40 bedrooms. There are only two large hotels in Monmouthshire with more than 100 bedrooms – the Marriott St Pierre (148 bedrooms) and the Hampton by Hilton Newport East at Magor (127 bedrooms).

3.1.4 Only two hotels (the Marriott St Pierre and Best Western Cwrt Bleddyn at Llangybi) have leisure and spa facilities.

3.1.5 The county's hotels are spread across the county, predominantly in rural locations. There is no hotel in Monmouth, only two small hotels in Chepstow and only one hotel (The Angel) in Abergavenny.

3.1.6. Judging by Tripadvisor reviews it is evident that the quality of Monmouthshire's current hotel supply is highly variable. Seven of the county's hotels have received mainly Excellent and Very Good ratings: Glen-yr-Afon House and the Three Salmons in Usk; Hampton by Hilton Newport East; Marriott St Pierre; Llansantffraed Court; The Angel at Abergavenny and Llanwenarth Court. Four hotels are consistently receiving Poor and Terrible ratings and frequent comments about the need for investment. Both of Monmouthshire's Travelodges are first generation roadside budget hotels that do not appear to have seen much recent investment.

3.2. Recent and Proposed Changes in Hotel Supply

New Hotels

3.2.1 The newest hotel in Monmouthshire is the Hampton by Hilton Newport East at Magor, which opened in 2011, with 127 bedrooms. There have otherwise been no new hotel openings in the county in the last 5 years.

Hotel Extensions, Refurbishment and Rebranding

3.2.2 From a trawl of planning applications we understand that there have been no major extensions, refurbishments or re-branding of existing hotels. A number have however been granted permission for additional car parking (Glen-Yr-Afon House, Usk; Old Rectory at Tintern), for external amenity areas (Mayhill Hotel at Monmouth) and for internal and external improvements requiring listed buildings consent (Angel Hotel at Abergavenny).

3.2.3. Approvals through the TISS programme include £25,000 to the Glen-Yr-Afon House Hotel for bedroom up-grading. The Three Salmons Hotel at Usk has also expressed interest through the TISS programme in refurbishing 10 bedrooms.

Hotel Closures

3.2.3 The Chepstow Hotel in Chepstow closed in 2010. Following the demolition of the hotel the site has been redeveloped for the new build Two Rivers Marston's Inn, which opened in November 2012 with 23 bedrooms.

3.2.3. The Abbey hotel at Tintern has registered an application for change of use to 11 residential dwellings, which has not yet been determined.

- 3.2.3. An application by the Rogiet Hotel at Rogiet to demolish the hotel and build 3 dwellings was withdrawn in 2012.

Changes in Ownership/ Hotels for Sale

- 3.2.4. Cwrt Bleddyn Hotel & Spa at Llangybi has recently been sold to overseas investors by agents Christie & Co after its previous owners, Lester Hotels, went into administration in August 2012.
- 3.2.5. Llanwenarth Hotel near Abergavenny is currently being marketed for sale by agents Colliers International.

Planned and Proposed Hotel Development

- 3.2.6 There has long been talk of a hotel being developed on the Portal Road site in Monmouth, owned by the County Council. The site has previously been marketed for sale and has attracted interest from a number of hotel operators but so far a sale for a hotel scheme has not progressed.
- 3.2.7 Premier Inn has Monmouth, Chepstow and Abergavenny on its list of target locations for new budget hotels. Abergavenny was previously a target location for Travelodge but does not appear to be so currently, following the company's revised hotel development strategy in the wake of its financial restructuring. This requirement could however come back as the market improves.
- 3.2.8. Additional sites for hotel development supported by the Local Development Plan also represent hotel schemes that might come forward – these include Hendre Mansion and Croft-y-Bwla at Monmouth and Piercefield House at Chepstow.

3.3 National Hotel Development Trends

- 3.3.1 Current trends in UK hotel development are as follows:
- The continuing development of **budget hotels** across the country. Premier Inn typically opens 40 new hotels in the UK each year. Travelodge has continued to expand although has reduced its list of target locations and is offloading some hotels currently as a result of the company's current financial restructuring. Other budget brands (Days Inn, Ibis) have developed more

slowly, as have upper-tier budget brands (Holiday Inn Express, Hampton by Hilton and Ramada Encore). Boutique budget hotel brands (Sleeperz, Nite Nite, Citizen M, Z Hotels) have started to emerge in major cities such as London, Cardiff, Manchester and Liverpool.

- There has been a fair amount of activity in terms of **boutique hotel** development both by independent hoteliers and small boutique hotel chains such as ABode, Chapter and Bespoke. Some of the major hotel chains have also launched boutique hotel brands. Indigo Hotels (an InterContinental Hotels Group brand) is the most active of these, with new openings in 2012 in Birmingham, Liverpool and Newcastle. In smaller towns independent hoteliers have opened boutique hotels. Examples include:
 - Cotswold House Hotel & Spa, Chipping Campden www.cotswoldhouse.com
 - Feversham Arms & Verbena Spa, Helmesley, North Yorkshire www.fevershamarmshotel.com
 - The Methuen Arms, Corsham, Wiltshire www.themethuenarms.com
- There has been relatively little activity in the past 3 years in terms of the development of new **3 and 4 star hotels**, other than some openings in major cities.
- There have been a few **country house hotel** and **golf hotel** openings in locations such as Hampshire, Cheshire, Cornwall, Yorkshire, Gloucestershire and Berkshire and proposals coming forward in Kent, Surrey, Hertfordshire, Devon, Yorkshire and Scotland.
- Another trend has been the development of **hotels at leisure attractions** such as theme parks, racecourses and sports stadia e.g. Legoland Windsor, Alton Towers, Lingfield Park, Newbury Racecourse and Twickenham.
- The other key trend in the UK hotel sector has been the development of **hotel spas** at many country house hotels, which have enabled hotels to tap into the rapidly expanding UK spa breaks market.

3.4 Hotel Development Opportunities in Monmouthshire

3.4.1. The assessment of Monmouthshire's current hotel supply and national hotel development trends suggests that the opportunities for hotel development in Monmouthshire are most likely to be in terms of:

- The upgrading of existing hotels under existing or possibly more likely new owners.
- The addition of hotel spas at some of the county's 3 and 4 star hotels.
- The development of small boutique hotels in Monmouth, Chepstow and Abergavenny, most likely through the repositioning of existing hotels and inns, or possibly through the conversion of suitable properties if available and affordable.
- Budget hotel development in Monmouth, Chepstow and Abergavenny. Premier Inn¹ offers the best prospect for securing budget hotels for the three towns as they are already of the company's list of target locations. Travelodge has scaled back on its hotel development programme and no longer has any requirements for any locations in Monmouthshire. The hotel market in each of the towns is unlikely to be strong enough to support other budget hotel brands, such as Holiday Inn Express or Ibis. Premier Inn is however such a strong brand and can also attract referral business from its nearby hotels in Ross-on-Wye, Newport, Pontypool and Cwmbran to ensure good occupancies for new hotels in Monmouth, Chepstow and Abergavenny.
- Monmouthshire's towns are unlikely to be able to support the development of new-build full service 3 or 4 star hotels: their hotel markets are not sufficiently developed to support new-build hotels at these levels in the market. New-build budget hotel development is a much more realistic proposition for the county's towns.

¹ Whitbread plc's budget hotel brand – the largest and most rapidly developing budget hotel brand in the UK

- Premier Inn and Travelodge hotels generally achieve high occupancies and attract a wide cross-section of customers. These hotel brands benefit from strong customer awareness and loyalty, national marketing and central reservations systems. Their hotels can frequently attract additional business to an area through their brand strength and customer base and referral business from sister hotels. With limited food and beverage operations budget hotels usually generate business for local restaurants and bars. They create new employment, particularly for young people. Branded budget hotels can also have a beneficial effect in terms of helping to encourage investment in existing accommodation businesses and/or possibly forcing poor quality operations to exit the market.
- There could be scope for a hotel to be developed at Chepstow Racecourse.
- There could be potential for the development of hotel accommodation on some of the county's golf courses, particularly proprietary courses.
- There could also be scope for the development of further country house hotels in Monmouthshire, given suitable properties for conversion.

4. INNS & RESTAURANTS WITH ROOMS

4.1. Current Supply

Inns

4.1.1 There are 37 inns in Monmouthshire with a total of 278 letting bedrooms and 569 bedspaces, accounting for 20% of the county's total supply of serviced accommodation.

MONMOUTHSHIRE – CURRENT SUPPLY OF INNS – DECEMBER 2012

Standard/ Type	Inns	Bedrooms	Bedspaces
4 star	5	34	74
3 star	5	37	65
2 star	1	8	16
Not graded	26	199	414
Total	37	278	569

4.1.2 The majority of the county's inns are not graded and likely to be of varying quality. The county has five 4 star inns. The Inn at Penallt stands out as an inn that has received a high number of Excellent ratings on Tripadvisor.

4.1.3 There are concentrations of inns in Monmouth, Abergavenny and Usk. Inns account for the majority of Monmouth's supply of serviced accommodation the county's supply of inns is otherwise spread across the county.

MONMOUTHSHIRE – CURRENT SUPPLY OF INNS – KEY LOCATIONS - DECEMBER 2012

Location	Inns	Bedrooms	Bedspaces
Monmouth	6	65	127
Abergavenny	6	47	98
Usk	4	33	63
Chepstow	2	17	35
Llanthony	2	16	31
Tintern	2	11	22

4.1.4 Inns in the county range in size from 1 to 24 bedrooms, but most are small, typically with 4-10 bedrooms.

4.1.5 The majority of Monmouthshire’s inns are independently operated by their owners or tenants. Brains Inns and Hotels operate three inns in the county – Plas Derwen and the Lamb & Flag at Abergavenny and Punch House at Monmouth. The King’s Head in Monmouth is operated by Wetherspoon Hotels. The George at Chepstow is operated under The Bramwell Pub Company’s Smith & Jones brand, which includes 6 inns that offer accommodation.

Restaurants with Rooms

4.1.6 Monmouthshire has some real distinctiveness in its supply of award winning restaurants with rooms. The county has four 5 star restaurants with rooms and a further three 3 and 4 star graded restaurants with rooms.

MONMOUTHSHIRE – RESTAURANTS WITH ROOMS – DECEMBER 2012

Restaurant	Location	Grade	Accolades	Bedrooms
The Crown at Whitebrook	Whitebrook	5 star	3 AA Rosettes/ 1 Michelin star	8
The Bell at Skenfrith	Skenfrith	5 star	2 AA Rosettes	11
The Hardwick	Abergavenny	5 star	2 AA Rosettes	8
The Newbridge on Usk	Tredunnoch	5 star	2 AA Rosettes	6
Bistro Prego	Monmouth	4 star	1 AA Rosette	8
The Coach House	Monmouth	4 star		4
Afon Gwy Restaurant	Chepstow	3 star		4

4.2. Changes in Supply

New Inns

4.2.1 Our research has not involved a detailed assessment of recent and proposed changes in the supply of pub accommodation in Monmouthshire. From the research that we have undertaken however we have identified the following pub accommodation development projects that have recently been completed in the county.

- Marston’s Inns opened the new-build 23-bedroom Two Rivers inn on the site of the former Chepstow Hotel in Chepstow in November 2012.

Planned/ Proposed Inns and Restaurants with Rooms

4.2.2 In terms of proposals for the development of inns and restaurants with rooms our research has identified the following proposed schemes:

- Anchor Inn, Tintern (new café facilities supported by TISS, £44,000)
- Restaurant 1861 (planning permission for 6 guest rooms)
- Brains – site allocations proposal
- Green Dragon Inn, Monmouth (planning permission for 8 en suite bedrooms)
- Three Tuns, Chepstow (£12,000 under TISS for new 4 star serviced accommodation)

Changes in Ownership/ Inns for Sale

4.2.3 The following inns in Monmouthshire are currently being marketed for sale:

INNS FOR SALE IN MONMOUTHSHIRE – DECEMBER 2012

Inn	Location	Bedrooms	Agent
King's Head Hotel	Abergavenny	14	Sidney Phillips
Queen's Head	Monmouth	6	Sidney Phillips
Castle Inn	Usk	10	Sidney Phillips
Wye Valley Hotel	Tintern	8	Christie & Co
Hunter's Moon Inn	Llangattock Lingoed	5	Sidney Phillips

4.3. Pub Accommodation Development Trends

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

- There has been a growth in the conversion of pub premises to gastropubs with boutique guest bedrooms. This type of pub accommodation has developed most rapidly in South East England and the Cotswolds. Examples in Wales and nearby English counties include:
 - The Felin Fach Griffin Inn, Brecon www.felinfachgriffin.co.uk
 - The New White Inn, Llandovery www.newwhitelion.co.uk
 - The Wheatsheaf Inn, Northleach, Gloucestershire
www.cotswoldswheatsheaf.com
 - The Beckford Arms, Tisbury, Wiltshire www.beckfordarms.com
- A number of pub companies have developed branded portfolios of character 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 has continued to develop its new build Marston's Inns brand, with new openings recently in North Wales, Monmouthshire and Somerset.
- 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, Peach Pub Company across the Midlands.
- Some budget pub accommodation brands have developed e.g. Good Night Inns.

4.4. Sector Development Potential in Monmouthshire

- 4.4.1 There is likely to be a need and opportunity for the upgrading of existing inns in Monmouthshire, including the repositioning of some suitable inns as gastropubs with boutique bedrooms by existing or new owners.
- 4.4.2. There could be scope for the development of further pub accommodation in the county either through the utilisation of unused bedrooms above pub premises, the conversion of suitable outbuildings and/or possible development of new-build guest bedrooms. The addition of letting bedrooms can help to support the future viability of pubs through providing a new source of income. Care is needed however not to over encourage pub accommodation development in the county. Monmouthshire already has a good stock of inns and there is a danger of diluting the market for these and new pub accommodation businesses through too rapid an increase in supply.
- 4.4.3 There could be scope for the development of further high quality restaurants with rooms in the county, either through the development of letting bedrooms at existing restaurants and/or the development of entirely new restaurants with rooms businesses.
- 4.4.4 The development of further high quality restaurants with rooms and gastropubs with bedrooms would contribute to Monmouthshire's food tourism product and help to further strengthen the county's appeal as the 'Food Capital of Wales'.
- 4.4.5 There could be scope for the development of new-build pubs with accommodation at Monmouth and Abergavenny, as has happened in Chepstow with the opening of Marston's Inns' Two Rivers inn. This could be a suitable option for the Portal Road site in Monmouth. Whitbread is likely to want to develop a pub operation alongside any new Premier Inn budget hotels that it may progress at Monmouth, Chepstow or Abergavenny.
- 4.4.6 It will be difficult for Monmouthshire to attract the national inn brands as the county lacks the sort of larger coaching inns that pub companies are seeking for these brands. The county may however attract interest from smaller, regional pub companies e.g. Brains

5. GUESTHOUSE AND B&B ACCOMMODATION

5.1. Current Supply

5.1.1 Monmouthshire has a good supply of guest houses, B&Bs and farmhouse B&Bs. There are currently 70 such establishments in Monmouthshire with a total of 249 letting bedrooms and 523 bedspaces, accounting for 18% of the county's total supply of serviced accommodation.

MONMOUTHSHIRE – CURRENT SUPPLY OF GUEST HOUSES AND B&BS – BY TYPE DECEMBER 2012

Type	Estabs	Bedrooms	Bedspaces
Guest Houses	13	71	151
B&Bs	43	135	278
Farmhouse B&Bs	14	43	94
Total	70	249	523

5.1.2 41 establishments (59% of the total) are graded, mostly achieving 4 and 5 star ratings. Monmouthshire has ten 5 star guest houses and B&Bs. 29 establishments are not graded. They are likely to be of varying quality. Our internet research has identified some good quality non-graded establishments in the county. Others may not be of such a high standard. Monmouthshire does not appear to have any boutique guest houses and B&Bs at present.

MONMOUTHSHIRE – CURRENT SUPPLY OF GUEST HOUSES AND B&BS – BY STANDARD DECEMBER 2012

Standard	Estabs	Bedrooms	Bedspaces
5 star	10	35	74
4 star	22	91	198
3 star	8	30	65
2 star	0	0	0
1 star	1	3	6
Not graded	29	90	180
Total	70	249	523

5.1.3 Monmouthshire’s supply of guest houses and B&Bs is spread across the county. There are concentrations in Abergavenny, Chepstow, Llandogo and Pandy. Monmouth has only three small B&Bs with a total of 5 letting bedrooms. Tintern only has two guest houses/ B&Bs and Usk just one small guest house.

**MONMOUTHSHIRE – CURRENT SUPPLY OF GUEST HOUSES AND B&Bs
KEY LOCATIONS - DECEMBER 2012**

Location	Estabs	Bedrooms	Bedspaces
Abergavenny	8	38	71
Chepstow	5	20	37
Llandogo	5	17	39
Pandy	5	13	26

Recent Changes in Guesthouse and B&B Supply

5.1.5 Our research has not included a detailed audit of changes in the supply of guesthouses and B&Bs in Monmouthshire. We did however identify some guest houses that have recently ceased trading e.g. Highfield House in Abergavenny and it is likely that some new ones have opened. This is typical of the churn factor in this sector of the visitor accommodation market: people generally enter the sector pre-retirement and run a guesthouse or B&B for a period of around 10 years before retiring and either selling up or closing down.

5.1.2. B&B schemes that have come through the planning system and been approved include:

- Ysgubor-Lan, Raglan – Conversion of an out-building for B&B accommodation and an extension to provide a breakfast room
- Falls Cottage, Monmouth - change of use to B&B
- Tighnabruiaich, Llandogo – change of use to mixed residential use and B&B, which also attracted support through the TISS programme

5.2. Sector and Comparator Destination Development Trends

5.2.1 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.

5.2.2 An emerging trend in the South of England, Wales and some major historic cities (e.g. Bath, Chester, London and Edinburgh) is the development of boutique B&Bs, offering luxury, contemporarily designed guest accommodation, good quality locally sourced breakfasts and in some cases spa treatments. Examples in Wales include:

- Fronlas, Llandeilo www.fronlas.com
- Fynnon, Snowdonia www.fynnontownhouse.com
- West Usk Lighthouse, St Brides, Newport www.westusklighthouse.co.uk
- Ty Croeso, Crickhowell www.ty-croeso.co.uk

5.3 Sector Development Potential in Monmouthshire

5.3.1 There is a need to encourage the continual upgrading of existing guest houses and B&Bs and to encourage new operators to provide the highest quality of accommodation that they can, to meet constantly rising customer expectations.

5.3.2 There will be an ongoing need to encourage the opening of new guest houses and B&Bs to replace those that close. Care will however be needed to avoid the opening of too many new establishments and the danger therefore of the market for guest house and B&B accommodation being diluted, particularly at off-peak times.

5.3.3 There would appear to be a need for more B&B and guest house accommodation in Monmouth. There could also be scope for additional B&Bs and guest houses in Tintern and Usk.

5.3.4 There could be scope for the development of boutique B&Bs and guest houses in Monmouthshire to capitalise on the growing demand for this type of accommodation.

- 5.3.5 There could be scope for B&B for Horses establishments in the county - B&Bs that also provide stabling and pasture for horses. Further work will however be needed to identify whether there is a market and a sufficiently developed bridleway network in the county for horse riding holidays to be actively promoted here. The Brecon Beacons appear to be the strongest location for the development of this type of accommodation.
- 5.3.6 Given the importance of the walking market to Monmouthshire, there is scope to encourage B&B and guest house providers to develop walker friendly facilities and services e.g. drying rooms.
- 5.3.7 There may be a need to encourage some B&B or guest house provision along the Wales Coast Path, possibly at Magor, depending on the likely demand for accommodation from people walking the Path. Offa's Dyke Path and the Wye Valley and Usk Valley Walks appear to be well serviced in terms of B&B and guest house accommodation. There could however be capacity issues at peak times. This requires further investigation.

6. HOLIDAY COTTAGES

6.1. Current Supply

6.1.1 Monmouthshire has a good stock of holiday cottages. According to Monmouthshire County Council's records (supplemented by our own Internet research) there are currently 164 holiday cottage businesses in Monmouthshire, with a total of 221 letting units and 920 available bedspaces.

MONMOUTHSHIRE – CURRENT SUPPLY OF HOLIDAY COTTAGES – BY STANDARD DECEMBER 2012

Standard	Estabs	Units	Bedspaces
5 star	24	30	153
4 star	34	46	185
3 star	11	22	81
Mixed grades	4	11	39
Not graded	91	112	462
Total	164	221	920

6.1.2 73 holiday cottage businesses (44.5% of the total) are graded, predominantly receiving 4 and 5 star ratings. Monmouthshire has thirty two 5 star holiday cottages.

6.1.3 Holiday cottages in Monmouthshire are a mixture of residential cottages and other residential properties that are being let as holiday accommodation; barns and other farm buildings that have been converted to holiday cottages; and other buildings that have been converted to self-catering accommodation, such as a chapel, folly and windmill.

6.1.4 The majority of Monmouthshire's holiday cottages are single properties. The county also has a number of small holiday cottage complexes, typically with 2-4 cottages. It has only two larger holiday cottage complexes, each with 6 units – Steppes Farm at Rockfield, near Monmouth and Usk Country Cottages at Llangwym. The county has no large holiday cottage complexes, with 8-9+ units.

6.1.5 As far as we have been able to establish very few of Monmouthshire's holiday cottages and holiday cottage complexes currently offer leisure facilities such as swimming pools, tennis courts, gyms, games rooms or snooker rooms.

6.1.6 Most holiday cottages in the county are small units with 1-3 bedrooms. The county has very few 4 or 5-bedroomed holiday cottages that can sleep 8-10 people and very few large 'super' cottages that can cater for house parties and large family and friendship groups.

MONMOUTHSHIRE – 'SUPER COTTAGES' – DECEMBER 2012

Cottage	Location	Bedrooms	Bedspaces
Coach House, Rockfield Music Studio	Rockfield	7	16
Treowen	Wonastow	12	25
Wyelands Estate	Pwllmeyric	9	22

6.1.7 As far as we have been able to establish Monmouthshire has very few holiday cottages that have been adapted for disabled guests and wheelchair users.

Recent Changes in Supply

6.1.8 Our research has not involved a comprehensive audit of recent changes in the county's supply of holiday cottages. We suspect however that the county's supply has increased in recent years. From the research that we have undertaken we identified a number of recently opened self-catering barn conversions.

Holiday Cottage Development Proposals

6.1.9 Our research¹ has identified a significant number of self-catering holiday cottage development proposals in Monmouthshire. Many of these involve the conversion of barns and other agricultural outbuildings on farms and in the countryside:

- Abergavenny
 - Ivy Cottage (conversion to holiday let)
 - Barn Farm (redundant farm building to holiday let)
 - Gelli Farm (conversion to 2 cottages)
 - Bryn Garth Farm (conversion of outbuilding to holiday cottage)
 - Werndau Golf Course (barn conversion to 2 holiday lets)
 - Llanellen Court (barn conversion to holiday lets)
 - Glan Usk Farm (conversion of workshop to holiday cottage)

¹ Based on planning applications from which it is not clear what has been implemented

- Caerleon
 - Llansoar Mill (change of use to holiday let)
- Chepstow
 - Parsons Grove (leisure facilities/amenity building for holiday accommodation)
 - Old Rectory (refurbishment of cottage for holiday let)
 - Beaufort Cottage (change of use to holiday let)
- Coleford
 - Beaulieu Farm (farm buildings to 2 holiday cottages)
- Devauden
 - Yeovil House (conversion of stable to holiday let)
- Glascoed
 - The Potting Shed (conversion and extension to holiday cottage)
- Goytre
 - Poultry Farm (change of use to holiday let)
 - Plough Rd (conversion to holiday let)
 - Great House Farm (barn conversion to 2 holiday cottages)
- Itton
 - Fox and Hounds (outbuilding conversion to holiday let)
- Magor
 - Salisbury Farm (redundant farm building to holiday let)
- Monmouth
 - Ash Barn (convert outbuilding to holiday let)
 - Cider Mill (barn conversion to holiday let)
 - Upper Meend Farm (holiday unit)
 - Pentre Farm (redundant agricultural building to holiday let)
 - Beeches, Monmouth (conversion to holiday let)
 - Riverdale (garage conversion to holiday let)
 - Orchard Bungalow (new cottage for holiday use)
 - Lower Penyclawdd Farm (convert outbuilding to holiday let)
 - Green Lawns (convert garage to holiday let)
 - Church Farm (conversion to holiday let)
 - Upper Llantrothy Farm (barn conversion to holiday let)
 - Woodside House (conversion of outbuilding to holiday let)
 - Gethly Farm (barn conversion to holiday let)
 - Old Hendre Farm (conversion to holiday let plus stabling for guests' horses)
 - Tregaer Mill Barn (change of use from residential to holiday let)

- Pontypool
 - Blackthorne Meadow (conversion of stables to holiday let)
- Rockfield
 - Brynhyfryd (barn conversion to holiday let)
- Usk
 - Yew Tree Cottage (barn conversion to disabled holiday let)
 - Willsbrook House, Raglan (conversion to holiday let)
 - High House Farm, Raglan (barn conversion to 3 holiday lets)
 - Cefn-Y-Coed Farm, Raglan (stable conversion to holiday let)
 - Trostrey Court (conversion of workshop to 4 holiday units)
 - Glencourt Lodge (redundant farm buildings to 2 holiday lets)
 - Coed Poeth Barn, Tregaer (barn to holiday let)
- Whitebrook
 - Hillside House (conversion of stable to holiday let)

6.1.10 A further 6 schemes are registered with the Council and not yet determined

6.1.11 In addition, permission has been sought and approved for other small scale forms of self-catering provision, including:

- Trefaldu Farm, Monmouth – 3 timber holiday lodges for use with an existing fishery
- Pen-Y-Wyrlod Farm, Abergavenny – siting of a heritage caravan and a timber lodge for holiday use

6.1.12 There is also evidence of planning being sought to vary conditions attached to the occupancy of self-catering units:

- Llanellen Court Farm, Abergavenny – variation of conditions to allow 6 month tenancies in addition to holiday lets

6.2 Sector Development Trends

6.2.1 In terms of holiday cottage sector development trends housing market trends have a significant impact on **residential properties let as holiday accommodation**, which forms the largest proportion of the stock of holiday accommodation in the UK. The current downturn in the residential property market has resulted in a significant increase in the numbers of residential properties that have become available to rent as holiday accommodation. With lower house prices owners have become more interested in making their properties available as holiday lets than selling at a reduced price. The availability of buy-to-let mortgages on low interest rates has also fuelled growth in the supply of this type of self-catering accommodation.

6.2.2 The overall **quality** of the UK self-catering offer has improved significantly over the last 10-20 years. Customers are demanding ever higher quality and are prepared to pay for it. Many are now looking for standards of décor, furnishings, appliances and equipment that are at least as good as, if not better than, what they have at home. Customers are increasingly looking for self-catering accommodation that can deliver a 'wow' factor. Self-catering property owners are recognising that they can achieve increased lettings and higher prices if they offer high quality accommodation. The supply of 4 and 5 star self-catering accommodation has thus been increasing. Specific quality improvements in self-catering accommodation have included:

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

6.2.3. 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.

6.2.4. The **conversion of redundant farm buildings** to self-catering accommodation has been a key trend over the past 30 years, fuelled by the 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.

6.2.5. **Boutique self-catering** is an emerging product development trend, mirroring the development of boutique hotels, guest houses and B&Bs. This is stylish, chic self-catering accommodation that features contemporary interior design; luxury kitchens with high quality kitchen appliances and cooking gadgets; luxury en-suite bathrooms and bedrooms with feature baths; top quality beds and bed linen; and the latest TV, home entertainment and music systems. Such accommodation trades at the top end of the UK holiday market and typically commands premium prices. Examples include:

- The Peren, near Hay-on-Wye, Herefordshire (www.theperen.com)
- Windfall Cottage, Beckford, Gloucestershire (www.windfallcottage.com)
- Agra Cottage, Healey, near Ripon (www.selfcateringcottages.net)
- Merlin Hill, Kilburn
(<http://www.uniquehomestays.com/unique/details.asp?id=2088>)
- Rowton Manor, Cheshire
(<http://www.uniquehomestays.com/unique/details.asp?id=1560>)

6.2.6. Examples of letting agencies specialising in boutique self catering include:

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

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

- Marris Barn, Thorganby Hall, Lincolnshire (www.thorganbyhall.co.uk/marris-barn)
- The Hills, Lincoln (www.uniquehomestays.com/unique/details.asp?id=756)
- Tregulland in Cornwall (www.tregulland.co.uk)
- Treasury Barn at Ickham in Kent (www.mulberrycottages.com/cottage/map/?id=52477&pf=CT3&pl=1QN)
- Pedington Manor in Gloucestershire (www.bigcottage.com/Location-1103.html)
- Cliff Barns in Norfolk (www.cliffbarns.com)

6.2.8 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)
- Big Holiday House (www.bigholidayhouse.com)
- Group Accommodation (www.groupaccommodation.com)
- Big Cottages (www.big-cottages.com)
- The Big Cottage Company (www.bigcottage.com)

6.2.9 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:

- Mellwaters Barn, Monmouthshire (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)

6.3 Sector Development Potential in Monmouthshire

6.3.1 We have not been able to access any research data on holiday cottage occupancy in Monmouthshire to be able to ascertain whether there is market potential for additional holiday cottages in the county. On the basis of the planning applications that have come forward it looks likely that farmers will continue to convert redundant buildings into self-catering accommodation. It also seems likely that further residential property owners may decide to let their properties for holiday purposes while the residential property market remains depressed. The priority will be to encourage such new provision to develop to a high standard.

6.3.2 In terms of size of holiday cottage, there would appear to be a gap in Monmouthshire for 4-bedroom self-catering cottages that can accommodate two families or extended family parties.

6.3.2 Our analysis of the key development trends in the UK holiday cottage sector suggests the following potential opportunities in Monmouthshire:

- Scope possibly for the development of boutique holiday cottages – to capitalise on the growing demand for this style of self-catering holiday accommodation.
- Potential possibly for further ‘super cottages’ that can cater meet the increasing demand for large family and friendship get togethers, celebrations and house parties: there are only three self-catering properties in Monmouthshire that can currently meet the requirements of this market.
- Scope for a few ‘Access Exceptional’ holiday cottages to meet the needs of wheelchair users and their families looking for suitably adapted self-catering accommodation. This is a niche market however, so significant additional provision is not warranted.

7. CANAL BOATS

7.1. Current Supply

7.1.1 There are 4 canal holiday boat operations in Monmouthshire with a total of 38 holiday boats offering 195 bedspaces.

MONMOUTHSHIRE – CURRENT SUPPLY OF CANAL HOLIDAY BOATS – DECEMBER 2012

Operator	Location	Boats	Bedspaces	Grade
Beacon Park Boats	Llanfoist Wharf	15	62	5 star
Castle Narrowboats	Gilwern	9	49	n/a
Red Line Boats	Llanover	10	62	n/a
Road House Narrowboats	Gilwern	4	22	n/a

7.2. Sector Development Trends

7.2.1 We have no information on current development trends in the canal holiday boat sector. We would expect that the trends in this sector are likely to mirror those in other sectors i.e. a drive for higher standards of accommodation and the development of boutique canal holiday boats. There may well also be a trend towards more eco-friendly boats: we understand that Castle Narrowboats is the only company in the UK to offer electric narrowboats for its holidays on the Monmouthshire and Brecon Canal. Further research is required to fully understand the development trends and opportunities in this sector.

7.3. Sector Development Potential in Monmouthshire

7.3.1 In the absence of any research data on canal holiday boat occupancy in Monmouthshire, market demand for canal holidays in the county or development trends in the sector, we are unable to make any comments on the potential opportunities for developing Monmouthshire's canal holiday boat supply. This will require further research.

8. HOLIDAY LODGES & HOLIDAY LODGE PARKS

8.1 Current & Proposed Holiday Lodge/ Lodge Park Supply

Current Supply

- 8.1.1 As far as we have been able to establish there are no holiday lodges or holiday lodge parks in Monmouthshire at present.

Planned & Proposed Development

- 8.1.2 The Master Plan for Goytre Wharf includes a proposal for an eco-friendly log cabin accommodation development project. Just outside the county plans have been announced for the development of 10 luxury 5 star chalets and 40 luxury hill-top apartments at Celtic Manor.

8.2 Sector Development Trends

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

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

- The Dream Lodge Group (www.thedreamlodggroup.co.uk) – 8 sites in East Sussex, Essex, Norfolk, Cambridgeshire, Devon and Cornwall;
- Lodge Retreats – part of Bourne Leisure – 7 sites in Yorkshire, Northumberland, Dorset, Somerset and Wales;
- Forest Holidays – part of the Forestry Commission (www.forestholidays.co.uk/cabins) – 6 sites in Scotland, Wales, Gloucestershire and Nottinghamshire, with planning permission for a new site in Hampshire (60 cabins) and a proposal for a new site in Delamere Forest in Cheshire for 78 forest cabins;
- Natural Retreats (www.naturalretreats.co.uk) has developed eco lodge parks in the Yorkshire Dales and North Scotland;
- 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.

8.2.3 Examples of other recent and current holiday lodge park developments include:

- Penvale Lakes, Llangollen, Denbighshire (www.penvalelakes.com) ;
- West Tanfield Luxury Lodges, Yorkshire Dales (www.westtanfieldluxurylodges.com) – a development of 32 contemporary log cabin style lodges for holiday home ownership;
- 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/homes-to-buy/the-homes.aspx) – 22 architect-designed 5 star woodland self-catering homes developed alongside a boutique hotel and spa.

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

- Bron Eifion Lodges, Criccieth, Gwynedd (www.broneifion.com);
- Herons Brook, Narbeth, Pembrokeshire (www.heronsbrookretreat.com);
- 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.

8.2.5. 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)- 114 golf lodges alongside a clubhouse, leisure club and 31 bedroom hotel;
- Lakeside Lodge, Huntingdon, Cambridgeshire (www.lakeside-lodge.co.uk) – seven 2-storey timber lodges alongside a 64 bedroom hotel, health club and conference and banqueting suite;
- De Vere Luxury Lodges (www.devereluxurylodges.co.uk) – luxury golf lodges for sale or rent have been developed as part of De Vere's Belton Woods and Slaley Hall golf resorts in Lincolnshire and Northumberland.

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

- Natural Retreats' Yorkshire Dales eco lodge park development near Richmond (www.naturalretreats.co.uk/yorkshire-dales/self-catering-holidays.php);
- Brompton Lakes, Yorkshire (www.bromptonlakes.co.uk/log-cabins-yorkshire.asp);
- Mill Meadow Eco Homes, Somerset (www.millfieldecoprojects.co.uk);
- Rosehill Lodges, Cornwall (www.rosehilllodges.com);
- Wheatland Farm Eco Lodges, Devon (www.wheatlandfarm.co.uk);
- Cranmer Country Cottages, Norfolk (www.norfolk-luxury-cottages.co.uk);
- Ludlow Ecolog Cabins, Shropshire (www.ludlowecologcabins.co.uk).

8.2.7 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, Sherwood Forest 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)
- Bryn Meurig Bach, Powys, Wales (www.canopyandstars.co.uk/find-a-place/living-room/bryn-meurig-bach)
- The Treehouse at Harptree Court, near Bristol (www.harptreecourt.co.uk/treehouse.php)

8.3 Sector Development Potential in Monmouthshire

8.3.1 There is no reason to think that Monmouthshire should not be able to support the development of the type of woodland or lakeside holiday lodge parks that have opened in other parts of the country, given suitable sites and developer interest. The county is within reach of sizeable catchment populations that could be interested in holiday lodge ownership. Demand for lodge ownership has however slowed during the recession, so the potential in Monmouthshire may be longer term, once the economy and residential property markets recover. The potential in the short term may be more in terms of holiday lodge rentals.

8.3.2 The county may be able to support the development of eco lodges and eco lodge parks, for ownership and/or rental.

8.3.3 There may also be scope for the development of holiday lodges linked to specific outdoor activities e.g.

- Fishing lodges associated with existing or new fishing lakes.
- Golf lodges on golf courses either for rental, timeshare or outright purchase.
- Holiday lodges alongside horse riding stables.

8.3.4 Monmouthshire may also be able to support the development of self-catering treehouses.

9. CARAVAN HOLIDAY HOME PARKS

9.1 Current & Proposed Holiday Park Supply

9.1.1 As far as we have been able to establish there is only one very small caravan holiday home park in Monmouthshire – Kings Orchard Park at Monmouth, which has just 5 caravan holiday homes for hire. The Bridge Caravan Park at Dingestow also has 3 caravan holiday homes for hire. There otherwise do not appear to be any caravan holiday homes available in Monmouthshire, either for hire or ownership.

9.1.2 Our research has not identified any proposals for new caravan holiday home parks in Monmouthshire or the expansion of existing sites.

9.2 Sector Development Trends

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

9.2.2 The leading UK holiday park operators have all embarked on **long-term investment programmes** to capitalise on the current growth in demand and ensure that they are well placed when consumer confidence returns. 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 and in many cases is not keeping up with the changes in customer expectations. Some of the key improvements and investments that have been made include:

- 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.

- The introduction of luxury lodges to sites for sale and/or rental which are of a very high specification, with contemporary design and the latest technology. Park Leisure, for example, has just opened what it is calling the UK's first boutique holiday park – Oyster Bay at Goonhaven in North Cornwall. It will offer luxury caravan and lodge holiday homes, with contemporary design and the latest technology, 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.
- 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.
- 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.
- There has been something of a trend in recent years for holiday park operators to convert touring caravan and camping pitches to caravan holiday home plots as this is usually much more profitable for them.

9.2.3 Holiday park operators are continuing to develop **new holiday parks** and to look for sites for new development or the re-positioning and expansion of existing sites. The difficulty of obtaining planning permission for a new holiday park has generally constrained the development of new sites however. The majority of local authorities across the country have planning policies that resist the development of new holiday parks because of their visual impact on the landscape. Flood risk issues are also a major barrier to new holiday park development. These constraints on the development of new holiday parks have however been a key factor in the robustness of the sector as it has meant that market demand has generally exceeded supply in most parts of the country. New caravan holiday home parks are very capital intensive to develop due to the investment needed in site infrastructure, the development of leisure and entertainment facilities, holiday home plot development and the establishment of hire fleets.

9.2.4 Holiday parks often face pressure from residential use of holiday homes. Bona fide holiday park operators are generally keen to deter such use, but it can be difficult to control, although the planning system endeavours to regulate this.

9.3 Sector Development Potential in Monmouthshire

9.3.1 There could be scope for the development of caravan holiday home parks in Monmouthshire, given suitable sites that are adequately screened to meet planning requirements in terms of visual impact and holiday park operator interest. The county is within reach of sizeable catchment populations in South Wales, Bristol and the West Midlands that could be interested in caravan holiday home ownership in Monmouthshire.

9.3.2 While the County Council has no specific planning policies on caravan holiday home parks its policies on touring caravan and camping sites focus on controlling visual impact and do not permit permanent caravans, suggesting that the development of permanent caravan holiday home parks in the county is likely to be resisted under the current planning policy framework. The Brecon Beacons National Park Local Development Plan will allow new sites for static holiday caravans and chalet complexes but only in exceptional circumstances.

10. TOURING CARAVAN & CAMPING SITES

10.1 Current Supply

Touring Caravan & Camping Sites – Current Supply

10.1.1 According to Monmouthshire County Council’s accommodation stock records (supplemented by our own internet research) there are 38 touring caravan and/or camping sites in Monmouthshire with a combined total of 1,087 pitches.

MONMOUTHSHIRE – CURRENT SUPPLY OF TOURING CARAVAN & CAMPING SITES – DECEMBER 2012

Type of Site	Sites	Pitches
Touring Caravan & Camping Sites	16	842
Touring Caravan Sites	1	53
Campsites	6	112
Certificated Sites ¹	15	80
Total	38	1087

10.1.2 Touring caravan and camping sites in Monmouthshire range in size from 4 to 145 pitches. The county has a number of medium sized sites, with 30-60 pitches and four large sites with 80+ pitches – Glen Trothy Caravan Park at Mitchel Troy (145 pitches) , Bridge Caravan Park at Dingestow (120 pitches), Blossom Touring Park at Llantilio Pertholey(90 pitches) and Wernddu Campsite at Abergavenny (80 pitches).

10.1.3 Only four of Monmouthshire’s touring caravan and camping sites are currently graded. The county has two 5 star sites (Pont Kemys Caravan & Camping Park at Chainbridge and Pyscodlyn Caravan & Camping Park at Llanwenarth Citra); one 4 star site (Bridge Caravan Park) and one 2 star site (Pen-Y-Dre Farm at Llanfihangel Crucorney).

10.1.4 Monmouthshire has one naturist touring caravan and camping site – Western Sunfolk Naturist Site near Tintern.

¹ Small 5-van/pitch caravan and camping sites that are certificated by either the Caravan Club or the Camping and Caravanning Club, without the need for planning permission

10.1.5 The county's supply of touring caravan and camping sites is concentrated around Monmouth and Abergavenny. There is very little provision currently around Chepstow, in the Usk area or in the Severnside area.

10.1.6 The Caravan Club has a club site at Pandy (53 pitches). The Camping and Caravanning Club has no club sites in Monmouthshire but two large club sites in the Forest of Dean.

10.1.7 As far as we have been able to establish most of the touring caravan and camping sites in the county are open from March or April until October.

10.1.8 We have not undertaken research to identify whether any of the county's touring caravan and camping sites offer seasonal tourer pitches¹.

Touring Caravan & Camping Sites – Recent Changes in Supply

10.1.9. From our research, we are not aware of any changes to the county's touring caravanning and camping provision.

Touring Caravan & Camping Sites - Planned & Proposed Developments

10.1.10. Our research has identified one proposal in the planning system for the development of a touring caravan and camping site – Great Treadam Farm/Hogs Head pub at Llanvetherine – which is recommended for approval.

There was also an application in 2012 to develop a touring caravan park and facilities block at Tredegar Farm, Chepstow that was refused permission, and two applications to vary conditions relating to siting static caravans (Wernddu Caravan Park, Abergavenny, refused) and other occupancy conditions (Blossom Park Caravan Site at Abergavenny, withdrawn).

¹ Where touring caravan owners leave their caravans on a site for the season to use at weekends and for holidays throughout the season

Camping Pods

10.1.11 As far as we have been able to establish none of Monmouthshire's touring caravan and camping sites currently offer camping pods¹ and the county has no camping pod parks.

10.2 Sector Development Trends

Touring Caravan & Camping

10.2.1 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 a recent club site opening has been 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 Cheshire, Lincolnshire and Scotland (opening in 2012). The Caravan Club also opened an entirely new club site in Bridlington, East Yorkshire in 2011.

10.2.2 Both the Caravan Club and the Camping and Caravanning Club are investing substantially in improving their sites. The Caravan Club has so far invested over £90 million in site development and acquisition over the last 10 years, while the Camping and Caravanning Club embarked on a 5-year, £29 million investment programme in 2009 to position its site network amongst the best in the UK by 2015.

¹ Wooden 'tents' sleeping 2- 4 people

10.2.3 Many independent touring caravan and camping parks are also investing in improving and developing their sites and facilities. The sort 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;
- Investment in site infrastructure e.g. drainage, roads, lighting, signage, entrances;
- Improvements to landscaping and site layouts;
- Better quality, heated toilet and shower blocks;
- New laundry facilities;
- Leisure facilities e.g. games rooms, saunas, gyms, internet rooms;
- The development of children's play areas and improvements to existing play areas;
- Catering operations;
- On-site shops;
- Installation of Wi-Fi;
- Improved access and facilities for disabled guests;
- The introduction of luxury camping accommodation

10.2.4 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.

10.2.5 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.

Camping Pods

10.2.6 Camping pods were first introduced in the UK at the Eskdale Camping & Caravanning Club site in the Lake District in 2008. These are wooden tents 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. The Eskdale site has 10 pods priced at £42.75 per night. They have proved extremely popular and have even attracted demand during the winter. The Camping and Caravanning Club has now introduced camping pods at its club sites in Bellingham, Northumberland; Skye; Gulliver's Kingdom at Milton Keynes; and Thetford Forest, where it has introduced a jumbo pod sleeping up to 5 people. 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 recently introduced its first camping pods development at the Grinton Lodge youth hostel at Reeth in the Yorkshire Dales. In some locations camping pod parks have started to develop e.g. Einon Valley Camping Pods (www.einonvalleypods.co.uk).

10.3 Sector Development Potential in Monmouthshire

10.3.1 The priority in terms of touring caravan and camping site development in the county is most likely to be in terms of the upgrading, development and possible expansion of existing sites. Ongoing investment will be needed to ensure that sites meet customer expectations in terms of quality. The expansion of existing sites may make them more viable and allow investment in site facilities. The provision of hard standings for touring caravans and motorhomes will enable sites to extend their season and allow trading during periods of wet weather and into the winter months.

10.3.2 The Caravan Club could be interested in opening a second club site in Monmouthshire, either through the acquisition and development of an existing site or the development of an entirely new site. The Camping and Caravanning Club might also be interested in opening a club site in the county. Discussions with both clubs are needed to establish whether the county could be of interest to them and what their requirements would be in terms of sites and other support. Potential sites could include Chepstow Racecourse or Caldicot Castle & Country Park.

- 10.3.3 There may be scope for the development of some new small to medium-sized touring caravan and camping parks and small certificated sites, on farms or linked to rural pubs if they have suitable land. Much will depend on how existing sites are performing and the extent to which they are currently turning business away. This will require further research.
- 10.3.4 There could be potential for the provision of further seasonal tourer pitches at existing and/or new sites in the county. In other studies that we have undertaken we have identified strong demand for such pitches.
- 10.3.5 There is likely to be good potential for the provision of camping pods at some of the touring caravan and camping sites in the county, and potential possibly for the development of camping pod parks. Demand is rapidly increasing for this type of accommodation and there is no reason to think that it cannot be successful in Monmouthshire.
- 10.3.6 There may be scope to develop network of camping pods along the long distance walks in the county – Offa’s Dyke Path, Wye Valley Walk, Usk Valley Walk and Wales Coast Path.
- 10.3.7 There could be potential for the development of campsites for canoeists, anglers and walkers in the Wye Valley, subject to safety measures in relation to flood alerts.

11. LUXURY CAMPING

11.1 Current and Proposed Supply

11.1.1 Monmouthshire has three luxury camping operations at present:

- Hidden Valley Yurts at Llanishen, near Chepstow – 6 yurts;
- Gabriel's Yurt, Hatterrall Hill, near Pandy – one yurt;
- Blaentrophy Romany Caravan, near Pandy – one gypsy caravan.

11.1.2 Our research has not identified any luxury camping proposals in Monmouthshire at present.

11.2 Luxury Camping Development Trends

11.2.1 A recent trend in recent years since camping has become 'cool' has been the growth in demand for luxury camping or '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 camping pods, geodesic domes, gypsy caravans and retro caravans. 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 138 locations in the UK.

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

- **Feather Down Farms** (www.featherdown.co.uk) is a concept that has been operated in the UK since 2005 by the Feather Down Farm Days company as a seasonal luxury camping holiday option. Originally developed in Holland, the concept involves Feather Down Farm Days providing working farms with 5-10 fully equipped Feather Down tents for erection between Easter and October. The tents provide spacious, ready-to-use camping accommodation including beds, bedding, a toilet, wood-burning cooking stove, cool chest and cooking equipment. The farmer is responsible for providing a cold water supply to each tent and connection to a mains sewer or septic tank, together with the provision of a communal hot shower facility. Feather Down Farm Days runs a national marketing, advertising and PR campaign and provides a central booking system. The company now has 27 sites across the UK. Their development strategy has focused initially on locations that are within a 2 hour drive time of London, as this is their core market. These holidays require some affluence, at circa £1000 for the week, and they recognise that they are aiming at the educated city dweller wanting rural family 'experience' for themselves and their children.
- **Ready-pitched luxury camps:** Jolly Days Luxury Camping (www.jollydaysluxurycamping.co.uk) in North Yorkshire is a boutique campsite that offers the ultimate in luxury camping, with 5 large tented lodges with four poster beds, sofas and chandeliers, and 5 pairs of 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. Forest Tented Lodges (www.tentedlodges.co.uk) in Pembrokeshire is a cluster of safari-style tents that come with en-suite showers. Safari Britain at Firle in East Sussex (www.safaribritain.com) offers a camp of 9 canvas bell tents around a communal living tent for group bookings. Dandelion Hideaway (www.thedandelionhideaway.co.uk) in Leicestershire offers a number of canvas cottages.

- **Country House Hideout** (www.countryhousehideout.co.uk) is a new venture from the creator of Feather Down Farm Days, Dutchman Luite Moraal, and opened in England by Mark Gordon. The concept is that guests are invited to stay in the grounds of a private country estate in luxury tented encampments in the style of explorers from years gone by. Each encampment is located in its own private clearing, sleeping up to eight people in luxurious beds, with a plumbed-in toilet, bathing tent, cooking cart and discovery tent equipped with binoculars, microscope and telescope. Four sites have opened so far in the UK in the Scottish Borders, Essex, Shropshire and Lancashire.
- **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 include York Yurts (www.yorkyurts.com) and Hidden Valley Yurts in Monmouthshire (www.hiddenvalleyyurts.co.uk).
- **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-Doodle-Do (www.northumbrianwigwams.com) has 12 wooden wigwams sleeping 4/5 people. Each wigwam is fully insulated and has electric lighting and heating. Foam mattresses are provided. The site has a central shower and toilet block, kitchen for guests' use and licensed restaurant on site. Springhill Farm in Northumberland (www.springhill-farm.co.uk/wigwams) offers a number of wooden wigwams alongside self-catering cottages and a touring caravan and camping site.

- Other examples of luxury camping offers include:
 - **Geodesic domes** e.g. The Dome Garden (www.domegarden.co.uk) at Coleford in Gloucestershire has 6 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. Other examples are Ekopod (www.ekopod.co.uk) in Cornwall and Cosy Under Canvas at Hay-on-Wye (www.cosyundercanvas.co.uk).
 - **Gypsy caravans** e.g. Gypsy Caravan Breaks in Somerset (www.gypsyncaravanbreaks.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 10 vintage American Airstream and Spartan caravans for hire. Happy Days Retro in East Dorset (www.happydaysrv.co.uk) has 2 airstream caravans available for hire for holidays.
 - **Shepherds Huts** e.g. The Bluebell Shepherds Huts in the Brecon Beacons (www.cottage-holiday-wales.co.uk/bluebell-shepherds-huts-black-mountains), Herdy Huts in the Lake District (www.herdyhuts.co.uk) and Shepherds Huts South East (www.shepherdshuts-southeast.com) in Kent
 - **Tree camping** in hammocks suspended in trees e.g. Mighty Oak in Cornwall (www.mighty-oak.co.uk)

11.3 Sector Development Potential in Monmouthshire

11.3.1 There is no reason to think that luxury camping should not be successful in Monmouthshire. Such accommodation offers would have a good fit with the Monmouthshire visitor product and should perhaps be proactively encouraged as a priority.

12. GROUP AND YOUTH ACCOMMODATION

12.1 Current & Proposed Supply

Current Supply

12.1.1 Monmouthshire has 9 accommodation establishments that cater specifically for groups.

MONMOUTHSHIRE – CURRENT SUPPLY OF GROUP & YOUTH ACCOMMODATION – DECEMBER 2012

Type of Accommodation	Estabs	Bedspaces
Outdoor Education Centres	2	120
Group Accommodation	1	50
Backpacker Accommodation	1	30
Bunkhouse Accommodation	5	96
Total	9	296

12.1.2 The Gwent Outdoor Education Service operates two outdoor education centres in Monmouthshire – Hilston Park, near Monmouth and Gilwern Outdoor Education Centre, near Abergavenny.

12.1.3 Caer Llan at Lydart, near Monmouth, is a field studies centre that has diversified into catering for family and group celebrations, weddings and conferences.

12.1.4 The county's supply of group and youth accommodation is concentrated around Abergavenny and Monmouth.

12.1.5 Monmouthshire has no camping barns or hostels.

Planned & Proposed Development

12.1.6 Planning permission has been granted for the development of what is referred to as a 'backpackers hotel' in Chepstow.

12.2 Sector Development Potential in Monmouthshire

- 12.2.1 Without further research to understand the performance of existing group and youth accommodation businesses in Monmouthshire and the demand for such accommodation in the county, we are unable to comment conclusively on the potential for the development of this sector of the county's accommodation stock.
- 12.2.2 There may be scope for the development of camping barns, particularly along Offa's Dyke Path and the Wye Valley Walk and in the Brecon Beacons. This requires further investigation however.
- 12.2.3 There could be potential for the development of hostels in Abergavenny, Monmouth and Chepstow, given the current lack of such accommodation in the towns and the appeal of these areas for walking and other outdoor activities.
- 12.2.4 The economics of camping barn and hostel development can often be fairly marginal. Caution is needed if encouraging the development of such forms of accommodation therefore.
- 12.2.5. There could be potential for a children's activity holiday centre in Monmouthshire, given a suitable property and site. The specialist children's activity holiday centre sector is rapidly expanding in the UK and is identified as having good potential for further expansion¹. 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 through local authorities and charitable organisations.

¹ 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

12.2.6 The two main players in the sector are PGL and Kingswood. Both companies have been the subject of high profile acquisitions in the last 5 years. PGL was acquired by Holidaybreak plc in May 2007 for £100m. Kingswood was acquired by DJL Merchant Banking (a division of Credit Suisse Bank) in July 2008, also for £100m. Both companies have since nearly doubled in size and now handle around 500,000 children each year. PGL opened the former Windmill Hill Place Tennis Centre near Herstmonceux in East Sussex as a children's activity holiday centre in May 2009 following a £7m revamp. The centre now offers activity courses for school and youth groups, together with summer camps and family activity holidays during the summer. The centre can accommodate up to 450 guests in bunk -bedded accommodation and new 4-6 person en-suite lodges. Facilities include a sports hall, swimming pool, climbing tower and zip wires and a multi-sports area. Existing lakes are used for canoeing and raft building. The centre has created 130 jobs.

12.2.7 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 Condoval Hall in Shropshire in 2011.

13. CONCLUSIONS & RECOMMENDATIONS

13.1 Identified Accommodation Development Potential

13.1.1 Our research suggests market potential for the development of a wide range of different types of tourist accommodation in Monmouthshire, as well as an opportunity to improve the quality and/or re-position some of the existing accommodation stock. Given the sensitive nature of much of the county, in terms of landscape and built heritage, both the scale of any accommodation development and its potential visual and operational impact will clearly be issues to manage in encouraging, supporting, permitting and directing the right development to the optimum locations. Improving both the quality and the range of the tourist accommodation offer in Monmouthshire will be key to satisfying the requirements of the county's existing markets and those it is seeking to target and grow, with the overall aim of securing a sustainable tourism industry and maximising the economic and social benefits this can bring.

13.1.2 Developing and expanding the county's tourist accommodation supply in line with the identified market potential will make a significant contribution to boosting tourism in Monmouthshire by providing opportunities to attract additional staying visitors from existing and new markets with a greater and more varied accommodation supply. Without expansion and development of the county's tourist accommodation offer tourism growth is likely to be much more modest.

Market Potential by Accommodation Type

13.1.3. Hotels

- The upgrading of existing hotels under existing, or new owners.
- The addition of hotel spas at some of the county's 3 and 4 star hotels.
- The development of small boutique hotels in Monmouth, Chepstow and Abergavenny, through the repositioning of existing hotels and inns, or possibly through the conversion of suitable properties if available and affordable.
- Budget hotel development in Monmouth, Chepstow and Abergavenny.
- There could be scope for a hotel to be developed at Chepstow Racecourse.
- There could be potential for the development of hotel accommodation on some of the county's golf courses, particularly proprietary courses.
- There could also be scope for the development of further country house hotels in Monmouthshire, given suitable properties for conversion.

13.1.4. Inns & Restaurants with Rooms

- The upgrading of existing inns, including the repositioning of some suitable inns as gastropubs with boutique bedrooms by existing or new owners.
- The development of further pub accommodation in the county, through the utilisation of unused bedrooms above pub premises, the conversion of suitable outbuildings and/or possible development of new-build guest bedrooms. The addition of letting bedrooms can help to support the future viability of pubs through providing a new source of income. Care is needed however not to over encourage pub accommodation development in the county. Monmouthshire already has a good stock of inns and there is a danger of diluting the market for these and new pub accommodation businesses through too rapid an increase in supply.
- The development of further high quality restaurants with rooms, either through the development of letting bedrooms at existing restaurants and/or the development of entirely new restaurants with rooms businesses.
- The development of further high quality restaurants with rooms and gastropubs with bedrooms would contribute to Monmouthshire's food tourism product and help to further strengthen the county's appeal as the 'Food Capital of Wales'.
- Possible scope for the development of new-build pubs with accommodation at Monmouth and Abergavenny, as has happened in Chepstow with the opening of Marston's Inns' Two Rivers inn. This could be a suitable option for the Portal Road site in Monmouth. Whitbread is likely to want to develop a pub operation alongside any new Premier Inn budget hotels that it may progress at Monmouth, Chepstow or Abergavenny.
- It will be difficult for Monmouthshire to attract the national inn brands as the county lacks the sort of larger coaching inns that pub companies are seeking for these brands. The county may however attract interest from smaller, regional pub companies e.g. Brains.

13.1.5. Guest Houses & Bed & Breakfast Accommodation

- The continual upgrading of existing guest houses and B&Bs to provide the highest quality of accommodation they can, to meet constantly rising customer expectations.
- An ongoing need to encourage the opening of new guest houses and B&Bs to replace those that close.
- A need for more B&B and guest house accommodation in Monmouth. There could also be scope for additional B&Bs and guest houses in Tintern and Usk.
- Scope for the development of boutique B&Bs and guest houses in Monmouthshire to capitalise on the growing demand for this type of accommodation.
- Possible scope also for B&B for Horses establishments in the county - B&Bs that also provide stabling and pasture for horses, subject to further research on need and a sufficiently developed bridleway network for horse riding holidays to be actively promoted here. The Brecon Beacons appear to be the strongest location for the development of this type of accommodation.
- Given the importance of the walking market to Monmouthshire, there is scope to encourage B&B and guest house providers to develop walker friendly facilities and services e.g. drying rooms.
- The development of B&B or guest house provision along the Wales Coast Path, possibly at Magor, depending on the likely demand for accommodation from people walking the Path. Offa's Dyke Path and the Wye Valley and Usk Valley Walks appear to be well serviced in terms of B&B and guest house accommodation. There could however be capacity issues at peak times. This requires further investigation.

13.1.6. Holiday Cottages

- Encouraging an on-going supply of holiday cottages, the priority being to encourage such new provision to develop to a high standard.
- The development of 4-bedroom self-catering cottages that can accommodate two families or extended family parties, for which there would appear to be a gap.
- New provision that reflects key sector development trends including:
 - Boutique holiday cottages – to capitalise on the growing demand for this style of self-catering holiday accommodation.
 - ‘Super cottages’ that can meet the increasing demand for large family and friendship get togethers, celebrations and house parties: there are only three self-catering properties in Monmouthshire that can currently meet the requirements of this market.
 - ‘Access Exceptional’ holiday cottages to meet the needs of wheelchair users and their families looking for suitably adapted self-catering accommodation. This is a niche market however, so significant additional provision is not warranted.
 - The possible development of some self-catering treehouses in the county.

13.1.7. Holiday Lodges & Holiday Lodge Parks

- Woodland and lakeside holiday lodge parks of the type successfully developed in other parts of the country, given access to sizeable urban catchments and developers active in the market, subject to suitable sites being available. The potential is currently stronger for the holiday lodge rental market.
- Eco lodges and eco lodge parks, for ownership and/or rental.
- Holiday lodges linked to specific outdoor activities including fishing, golf and riding.

13.1.8. Caravan Holiday Home Parks

- There could be market potential for caravan holiday home parks in Monmouthshire given that the area has a strong catchment for holiday home ownership from Cardiff and Bristol and the West Midlands. Realising the potential would be dependent upon site availability and suitability, developer interest and compliance with planning policy (which could present a challenge in an environmentally sensitive county like Monmouthshire).

13.1.9 Touring Caravan & Camping Sites

- As a priority, the upgrading, development and possible expansion of existing sites, to ensure they meet customer expectations in terms of quality, help improve viability, and extend the season into the winter months and allow trading during periods of wet weather.
- The Caravan Club could be interested in opening a second club site in Monmouthshire, either through the acquisition and development of an existing site or the development of an entirely new site. The Camping and Caravanning Club might also be interested in opening a club site in the county. Discussions with both clubs are needed to establish whether the county could be of interest to them and what their requirements would be in terms of sites and other support. Potential sites could include Chepstow Racecourse or Caldicot Castle & Country Park.
- Possible scope for the development of some new small to medium-sized touring caravan and camping parks and small certificated sites, on farms or linked to rural pubs if they have suitable land. Much will depend on how existing sites are performing and the extent to which they are currently turning business away. This will require further research.
- Likely potential for the provision of further seasonal tourer pitches at existing and/or new sites in the county. In other studies that we have undertaken we have identified strong demand for such pitches.
- Good potential for the provision of camping pods at some of the touring caravan and camping sites in the county, and potential possibly for the development of camping pod parks. Demand is rapidly increasing for this type of accommodation and there is no reason to think that it cannot be successful in Monmouthshire.

- Scope to develop a network of camping pods along the long distance walks in the county – Offa’s Dyke Path, Wye Valley Walk, Usk Valley Walk and Wales Coast Path.
- Potential for the development of campsites for canoeists, anglers and walkers in the Wye Valley, subject to safety measures in relation to flood alerts.

13.1.10 **Luxury Camping**

- There is no reason to think that luxury camping should not be successful in Monmouthshire. Such accommodation offers would have a good fit with the Monmouthshire visitor product and should perhaps be proactively encouraged as a priority.

13.1.11 **Group & Youth Accommodation**

- Further research is needed on the performance of and demand for group and youth accommodation in Monmouthshire to comment conclusively on the potential for the development of this sector. The economics of camping barns and hostels can be fairly marginal and requires a cautious approach. However, market and sector trends would indicate there could be scope for the development of:
 - Camping barns, particularly along Offa’s Dyke Path and the Wye Valley Walk and in the Brecon Beacons.
 - Hostels in Abergavenny, Monmouth and Chepstow, given the current lack of such accommodation in the towns and the appeal of these areas for walking and other outdoor activities.
 - Children’s activity holiday centres, given a suitable property and site. This sector is rapidly expanding in the UK and is identified as having good potential for further growth, both by independents, multiple operators (PGL, Kingswood, JCA), charitable organisations and local authorities.

13.2 Potential Public Sector Interventions – Action Planning

13.2.1 In order to assist us in developing a clear Action Plan for capitalising on the identified accommodation development opportunities in Monmouthshire we held a brainstorming workshop in Monmouth on Friday 14 December 2012 with Monmouthshire County Council's Tourism, Planning Policy, Development Control, Estates and Economic Development officers, together with representatives from partner organisations. The discussions during the workshop identified the following priorities for action:

a) Informing the Planning Framework & Process

13.2.2 Planning policy and development control will ultimately determine most new tourist accommodation development in Monmouthshire, so ideally need to be in line with the market potential identified and the types of accommodation product that the County Council wishes to encourage. Three key areas for action were identified:

- The development of a **Supplementary Planning Document (SPD)** on tourist accommodation development in Monmouthshire. This would support and flesh out the policies in the Local Development Plan (which is at an advanced stage) and would enable the County Council to articulate the type of tourist accommodation it wishes to see developed in the county and where this can best be located, as well as clearly stating criteria relating to opening periods, occupancy conditions, evidence required to support applications, and retention criteria. There would be an opportunity in the SPD to articulate policies in relation to new and emerging forms of tourist accommodation, including low impact offers such as camping pods and luxury camping. The SPD could also consider whether there might be any circumstances or locations where more significant tourist accommodation development projects could be considered in Monmouthshire. Once adopted the SPD would be a material planning consideration in determining applications.

- Identifying sites and buildings that could be available, suitable and acceptable in planning terms for new tourist accommodation development will be key to capitalising on many of the identified opportunities for accommodation development in Monmouthshire. A programme of work focusing on **Tourist Accommodation Site Identification and Assessment** should therefore be considered as a priority. This would require the involvement of the County Council's Planning Policy, Development Control, Estates, Economic Development/Inward Investment and Tourism teams as a group to ensure that all angles are covered. The process would include:
 - A more detailed evaluation of the deliverability of the tourist accommodation development sites allocated in the LDP;
 - Identification and assessment of sites and buildings with potential that are in County Council ownership;
 - Consideration of sites with compatible uses, where accommodation could be developed, e.g. Hilston Park, Caldicot Castle & Country Park, Chepstow Racecourse, golf courses, vineyards, Humble by Nature rural skills centre – discussions with the owners and operators of such sites would be needed;
 - A review of properties on the market suitable for conversion or re-positioning, sourced through contact with commercial property agents;
 - Assessment of sites with past proposals for accommodation development e.g. Goytre Wharf;
 - Identification of possible development/ redevelopment sites in the key towns.

Depending on the sites identified and the type of accommodation development that they could be suitable for, there may be a need to undertake some research to test accommodation developer interest in Monmouthshire e.g. if sites are identified that could be suitable for a holiday lodge park or children's activity holiday centre it would be worth speaking to relevant accommodation companies to assess their potential interest in such sites.

- **Member Education** was also identified at the workshop as a valuable strand of work, to ensure that there is a full understanding of future accommodation development proposals coming forward for planning, and the benefits that they can bring. This might take the form of a training seminar/presentation, perhaps supported by some guidance materials.

b) Monmouthshire Tourist Accommodation Investment Prospectus

13.2.2 Current inward investment activity relating to tourist accommodation development is very reactive, and lacking in any local evidence base. There are no dedicated materials to hand out to development enquirers or similar online resource to direct them to. If the County Council is serious about attracting investment into Monmouthshire's tourist accommodation offer and capitalising on the opportunities that we have identified, it needs to have some sort of material that makes the case as to why accommodation operators should invest in the county. The production of a **Monmouthshire Tourist Accommodation Investment Prospectus** would meet this need. It should provide information on:

- Where the county is heading as a visitor destination - its strengths and growth potential;
- The Destination Development Plan and Marketing Strategy and how they are being progressed;
- The opportunities for tourist accommodation development in the county;
- Information on how the county's tourist accommodation offer has been developing – including new openings and proposed projects;
- Case studies of successful accommodation businesses in the county;
- Available advice and financial support;
- Key contacts.

13.2.3 The prospectus can most usefully be produced in a digital format that can be regularly updated as new information becomes available, easily printed off as required and distributed electronically.

13.2.4 The prospectus should be used pro-actively to make potential investors aware of the opportunities for them in Monmouthshire, through disseminating it to commercial property agents, landowners, property developers, pub companies, hotel companies and other accommodation operators. There may also be a case for some form of PR activity to gain coverage for the prospectus in the hospitality, leisure and property media.

c) Developing Quality Pub Accommodation and Restaurants with Rooms

13.2.5 Monmouthshire has a good supply of pubs and restaurants with rooms, and some high quality offers. The development of rooms associated with pubs/gastropubs and restaurants is a good and viable way to deliver high quality bedrooms on a small scale. Adding guest bedrooms can also help to make pubs and restaurants more commercially sustainable. A **Pub & Restaurant Accommodation Development Programme** would have good fit with Monmouthshire's aspiration to be the Food Capital of Wales, and could possibly tap into existing and future funding streams such as adventa's Food Tourism programme or future RDPE programmes. Elements of the programme might include:

- User-friendly **business development guidance** for pub and restaurant owners/tenants on the how and why behind rooms development, including key performance indicators and case studies to inform the business planning process;
- **Training** in accommodation development project planning, welcome skills, and marketing;
- **Targeting breweries and pub companies** to inform their pub development teams of the potential and benefits of tourist accommodation development;
- Working with **Pub Is The Hub** to develop some of the identified opportunities in Monmouthshire and explore other potential support available;
- **Exploring routes to funding** through the RDP, adventa, TISS, Finance Wales, banks, breweries, Centre for Business and Business in Focus.

13.2.6 It might be possible to broaden this pub/restaurant accommodation development programme to a wider strand of work that incorporates **accommodation linked to food** in the broadest sense. This would enable other/non-serviced forms of accommodation to be brought into the programme, as well as non-pub/restaurant sites. An example might be luxury camping on a vineyard. This might present more of an opportunity to access Food Tourism funding from adventa.

d) Developing Monmouthshire's Luxury Camping Offer

13.2.7 Luxury camping was identified in the brainstorming workshop as a priority for development in the county, accepting that it will be a largely seasonal form of accommodation. The low impact and high quality aspects of luxury camping have strong appeal and luxury camping can fit well with Monmouthshire's Food Tourism offer and aspirations where luxury camping operators promote and in some cases provide local food and drink products. A **Monmouthshire Luxury Camping Development Programme** might include the following:

- A **luxury camping development advice sheet** with guidance on the various types of accommodation this covers, the rationale and potential for development, the benefits and typical performance indicators, planning and legal requirements, sources of advice and suppliers;
- A **luxury camping exhibition** of the suppliers of bell tents, yurts, tipis, wigwams, camping pods etc., which would also present an opportunity for supply chain development as several manufacturers and suppliers of luxury camping products are based in Wales, including a yurt supplier (The Authentic Mongolian Yurt Company/ Hidden Valley Yurts) in Monmouthshire.
- **Training workshops** for people considering setting up a luxury camping operation covering issues such as planning, customer expectations, set up costs, running costs and marketing.

e) Accommodation to Support Walking Routes

13.2.8 Walking is an important part of the Monmouthshire offer, and the county incorporates parts of several long distance footpaths, including The Wales Coast Path, Offa's Dyke Path, the Wye Valley Walk and the Usk Valley Walk. Developing accommodation along these routes would help support and promote their use, both for walkers wanting to undertake long distance walking, and for others who might prefer to walk shorter routes taking in part of the long distance paths and loops off them. Accommodation development requirements and opportunities along the walking routes could be in terms of further B&Bs and guest houses, pub accommodation, hostels, bunkhouses, camping barns, camp sites, camping pods or ready erected tents. At present there is no information about how existing accommodation businesses along the walking routes are performing or what demand there could be for other forms of tourist accommodation. A **Monmouthshire Walking Routes Accommodation Development Programme** thus needs to start with research to better understand the market requirements for tourist accommodation along each walking route. Depending on the research findings the Programme might then include:

- Accommodation development workshops;
- Pilot projects e.g. along the lines of the 'Perfect Pitch' camp site project in the Vale of Glamorgan or possibly a camping pod/ ready erected tent network pilot project.

Some work is already being progressed on encouraging accommodation provision along the Wales Coast Path and the Usk Valley Walk through the RDPE 'Welcome to Monmouthshire' programme. There may also be scope to tap into other sources of funding e.g. Wye Valley AONB Sustainable Development Fund.

In most cases the issue of developing the accommodation offer along Monmouthshire's key walking routes will extend beyond the county's boundary. Discussions should therefore be held with partners along each route in order to devise meaningful programmes and pilot projects.

f) Underpinning Accommodation Development with Performance Research

13.2.9 Hotel Solutions' work on this study has identified a real gap in performance research across the tourist accommodation sector. What is available via Visit Wales is questionable in its accuracy and representativeness, given the small sample sizes and lack of local focus – indeed, the figures are extremely low and potentially both misleading and off-putting should any potential investor come across them. There would be real merit in filling some of these gaps through a research strand of work, focusing on product priorities. This might be a mixture of case study work and performance surveys. Initially the programme might focus on:

- Holiday cottage occupancy/lettings – to help establish what market potential there is for further holiday cottages to open in Monmouthshire.
- Canal boat occupancy – to help understand if there is any need for additional canal holiday boats on the Monmouthshire & Brecon Canal.
- Touring caravan and camping occupancy – to assist in identifying whether there is any need for additional touring caravan and camping provision in the county and assessing whether there is scope for existing sites to extend their operating season.
- Group and youth accommodation performance – to understand the market demand for these types of accommodation in the county.
- Case studies of successful boutique hotels, country house hotels, golf hotels, restaurants with rooms and gastropubs with boutique bedrooms – to help support the development/ further development of these forms of tourist accommodation in Monmouthshire.

g) Monitoring Tourist Accommodation Development and Investment

13.2.10 The success of the Tourist Accommodation Development Programme will need to be measured in terms of:

- The level of investment that has been stimulated and encouraged in existing tourist accommodation businesses in the county;
- The extent to which new tourist accommodation businesses have been encouraged and supported;
- The new jobs that have been created as a result.

13.2.11 The County Council will thus need to put in place some sort of system for collating and recording information on tourist accommodation investment and development in the county. The County Council updated its accommodation stock records in 2012. It will need to continually update these records as new information comes to light. There is also merit in compiling a more detailed narrative of investment in Monmouthshire's tourist accommodation offer by seeking to collect the following information on tourist accommodation development and investment projects as they come to light:

- The scope and level of investment that has been made;
- How the project was funded;
- What stimulated the project;
- Whether the project was encouraged and/or supported through the Tourist Accommodation Development Programme;
- The number of jobs created.

13.2.12 Such information will assist in evaluating the success of the Tourist Accommodation Development Programme. It can also be fed into the Tourist Accommodation Investment Prospectus and used in PR activity to raise awareness of how the county's tourist accommodation offer is developing.

13.3 Moving Forward – Next Steps

13.3.1 Section 13.2 has outlined a series of potential public sector interventions that can be undertaken to stimulate, encourage and support tourist accommodation development in Monmouthshire in line with the identified opportunities. These interventions have been compiled into a Monmouthshire Tourist Accommodation Development Action Plan, presented at Appendix 2. This comprises seven projects/programmes. The Action Plan sets out:

- The key tasks that need to be undertaken to progress each project/programme.
- Suggested lead and contributing officers.
- Indicative budgets over and above officer time – these mainly cover provision for consultancy support to progress projects if required but also cover other likely costs.
- Potential sources of funding.
- Suggested timescales.

13.3.2 The next step in taking the Action Plan forward will be for it to be circulated to all relevant MCC officers and personnel in partner organisations for their comments and a clear indication of whether they can:

- Commit to leading or contributing to projects – and what role that they envisage playing
- Contribute staff time and budget to projects.

13.3.3 Assuming that there is a good level of support for progressing the Action Plan there could be merit in establishing some form of Monmouthshire Tourist Accommodation Development Group to monitor and review progress. This could be simply in terms of periodically re-convening the December 14 brainstorming workshop participants. The views of the relevant officers/ personnel should be canvassed on this suggestion also.

13.3.4 Some of the proposed projects (or specific elements of projects/programmes) could be taken forward at a regional or national level e.g. guidance/advice sheets, case studies, training programmes, research projects, possibly with Monmouthshire acting as a pilot to be rolled out more widely. It will be vital therefore to consult CRT and VisitWales on the proposed Action Plan.

13.3.5 In terms of timescales it would be beneficial if as many projects/programmes as possible are progressed in 2013 in order to build on the momentum of the work that has been undertaken so far. Quick wins could be:

- The SPD;
- The Sites Assessment work;
- The Member Educational;
- The Tourist Accommodation Investment Prospectus
- The Luxury Camping Exhibition – and the Luxury Camping Development Advice Sheet
- The holiday cottage occupancy survey.

APPENDICES

APPENDIX 1

MONMOUTHSHIRE SERVICED ACCOMMODATION SUPPLY

**MONMOUTHSHIRE SERVICED ACCOMMODATION SUPPLY – BY TYPE
DECEMBER 2012**

Type Of Accommodation	Estabs	Letting Bedrooms	Letting Bedspaces
Hotels	16	626	1,650
Guest Houses	13	71	151
Restaurants With Rooms	7	49	102
B&B	43	135	278
Farmhouse B&B	14	43	94
Inn	37	278	569
Total	130	1,202	2,844

**MONMOUTHSHIRE SERVICED ACCOMMODATION SUPPLY – BY LOCATION
DECEMBER 2012**

Location	Estabs	Letting Bedrooms	Letting Bedspaces
Abergavenny Area	34	223	464
Abergavenny Town	15	126	261
Caldicot	5	25	48
Chepstow Area	19	261	548
Chepstow Town	10	76	165
Grosmont	3	8	16
Llandogo	5	14	33
Llanthony	3	19	37
Magor	2	170	594
Monmouth Area	25	183	461
Monmouth Town	11	82	176
Pandy	6	21	46
Raglan	2	20	39
Skenfrith	1	11	22
Tintern	6	62	128
Usk Area	19	185	408
Usk Town	7	87	171
Total	130	1,202	2,844

MONMOUTHSHIRE TOURIST ACCOMMODATION DEVELOPMENT ACTION PLAN – 2013-2014

Project	Key Tasks	Lead Officer	Contributing Officers	Indicative Budget ¹	Source of Funding	Timescales
Tourist Accommodation Development Supplementary Planning Document (SPD)	<ul style="list-style-type: none"> • Review Monmouthshire Tourist Accommodation Development Opportunities report – consider implications for planning policy • Review best practice from other parts of the country • Brainstorming workshop • Draft SPD • Consult on draft SPD • Finalise SPD 	MCC Planning Policy	MCC Development Control MCC Tourism MCC Estates Monmouthshire Enterprise Wye Valley AONB Unit	£2-3k	MCC CRT? VW?	Aim for draft SPD by May 2013?

¹ Includes possible consultancy support, printing costs, meeting costs and other project costs. These are indicative estimates only. More detailed costing and quotations are likely to be needed

Monmouthshire Tourist Accommodation Development Opportunities

Project	Key Tasks	Lead Officer	Contributing Officers	Indicative Budget	Source of Funding	Timescales
<p>Tourist Accommodation Sites Identification and Assessment</p>	<ul style="list-style-type: none"> • Compile list of potentially suitable sites for tourist accommodation development through: <ul style="list-style-type: none"> ○ Review of sites allocated in the LDP + site allocation representations for the new LDP ○ Review of MCC owned sites and buildings ○ Canvassing the interest of the owners of potentially suitable sites ○ A survey of commercial property agents ○ Review of known proposals for tourist accommodation projects ○ Other site search activity e.g. in the main towns • Assess the suitability of sites for tourist accommodation development in terms of: <ul style="list-style-type: none"> ○ Fit with market and operator requirements ○ Acceptability in planning terms • Survey relevant tourist accommodation operators/developers to assess their interest in progressing projects in Monmouthshire (for which potential sites have been identified) 	<p>MCC Estates?</p>	<p>MCC Tourism Monmouthshire Enterprise MCC Planning Policy MCC Development Control Wye Valley AONB Unit BBNPA</p>	<p>£5-7k</p>	<p>MCC CRT? VW?</p>	<p>By June 2013?</p>

Monmouthshire Tourist Accommodation Development Opportunities

Project	Key Tasks	Lead Officer	Contributing Officers	Indicative Budget	Source of Funding	Timescales
Elected Member Educational	<ul style="list-style-type: none"> • Presentation of the Tourist Accommodation Development Opportunities report to members 	MCC Tourism		£600	MCC	Progress as part of the process of developing the SPD
Monmouthshire Tourist Accommodation Investment Prospectus	<ul style="list-style-type: none"> • Draft Prospectus • Case studies of successful accommodation businesses in the county • Dissemination of the Prospectus • PR activity to promote the Prospectus 	Monmouthshire Enterprise	MCC Tourism	£1-2k	MCC CRT?	By June 2013
Pub & Restaurant Accommodation Development Programme	<ul style="list-style-type: none"> • Research and draft Pub & Restaurant Accommodation Development Guidance • Case studies of successful pub and restaurant accommodation operations • Develop and roll out training programme • Explore sources of funding support for pub and restaurant accommodation development 	adventa (Food Tourism)	MCC Tourism CRT Monmouthshire Enterprise	£5-10k	RDPE MCC CRT? VW? Pub is the Hub	<p>Aim to complete development work by Sept 2013 for launch and roll out of training programme Autumn/Winter 2013/14</p> <p>Alternatively work up as a project for inclusion in the next RDPE programme</p>

Monmouthshire Tourist Accommodation Development Opportunities

Project	Key Tasks	Lead Officer	Contributing Officers	Indicative Budget	Source of Funding	Timescales
Luxury Camping Development Programme	<ul style="list-style-type: none"> • Develop Luxury Camping Development Advice Sheet • Stage Luxury Camping Exhibition • Develop and roll out Luxury Camping training workshops 	MCC Tourism	CRT Wye Valley AONB Unit Monmouthshire Enterprise BBNPA	<ul style="list-style-type: none"> • £1k • £3-4k • £3-4k 	MCC CRT? VW? Wye Valley AONB Sustainable Development Fund? RDPE?	<p>Aim to hold Luxury Camping Exhibition in Spring 2013</p> <p>Develop training workshops by Sept 2013 for launch and roll out of training programme Autumn/Winter 2013/14</p> <p>Alternatively work up as a project for inclusion in the next RDPE programme</p>

Monmouthshire Tourist Accommodation Development Opportunities

Project	Key Tasks	Lead Officer	Contributing Officers	Indicative Budget	Source of Funding	Timescales
Walking Routes Accommodation Development Programme	<ul style="list-style-type: none"> • Consult with partners along walking routes to assess interest in collaborative projects • Research to identify market requirements for tourist accommodation along walking routes • Accommodation development training workshops along walking routes • Pilot camping/ luxury camping/ camping pod projects 	MCC Tourism Wye Valley AONB Unit (Wye Valley Walk)	MCC Countryside Monmouthshire Enterprise adventa CRT BBNPA	Per route: <ul style="list-style-type: none"> • £2-3k • £2-3k • £30-40k? 	'Welcome to Monmouthshire' RDPE programme CRT? CCW?	Progress 'Welcome to Monmouthshire' projects in 2013 Develop project for Wye Valley Walk in 2013 Possibly work up as projects for inclusion in the next RDPE programme

Monmouthshire Tourist Accommodation Development Opportunities

Project	Key Tasks	Lead Officer	Contributing Officers	Indicative Budget	Source of Funding	Timescales
Tourist Accommodation Performance Research Programme	<ul style="list-style-type: none"> • Holiday cottage occupancy/ lettings survey • Canal boat operator survey • Touring caravan and camping occupancy survey • Survey of group and youth accommodation operators • Case studies of successful boutique hotels, country house hotels, golf hotels, restaurants with rooms and gastropubs with boutique bedrooms (in Wales and England) 	MCC Tourism	Monmouthshire Enterprise	<ul style="list-style-type: none"> • £3-4k • £1.5k • £2-3k • £2k • £3k 	MCC VW? CRT?	Progress surveys in 2013 subject to budget availability
Tourist Accommodation Development and Investment Monitor	<ul style="list-style-type: none"> • Continuous updating of accommodation stock records • Ongoing compilation of Monmouthshire Tourist Accommodation Investment Monitor 	MCC Tourism	Monmouthshire Enterprise MCC Development Control	Staff time only		Ongoing